

PERCEPTION OF PARALLEL TRADE OF PHARMACEUTICALS IN POLAND – RESULTS OF NATIONAL MARKET RESEARCH



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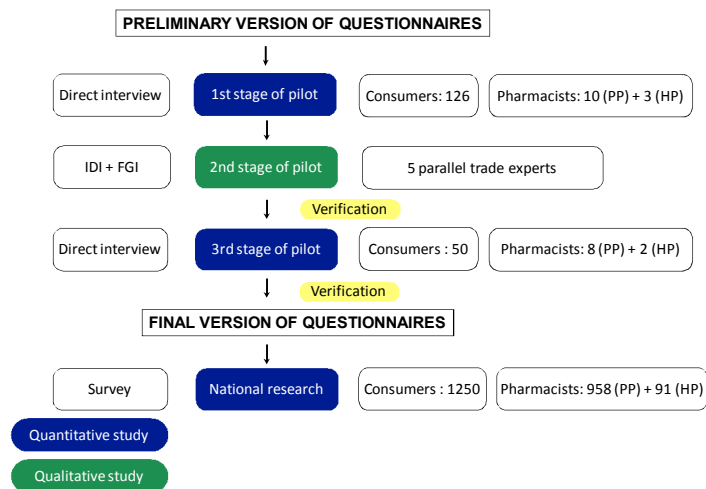
OBJECTIVES:

Conduct qualitative and quantitative surveys and evaluate the perception of parallel trade (PT) of pharmaceuticals among pharmacists and consumers in Poland; learn about experiences concerning parallel trade phenomenon; develop and verify hypotheses concerning potential parallel trade risks and opportunities.

METHODS:

Individual in-depth interview (IDI) and focus group interview (FGI) with parallel trade experts, direct interviews and auditorium/e-mail/internet/postal surveys among pharmacists (28/27 questions for public pharmacies (PP)/hospital pharmacies (HP) respectively) and consumers (13 questions).

Figure 1. Methodologies used in the study.

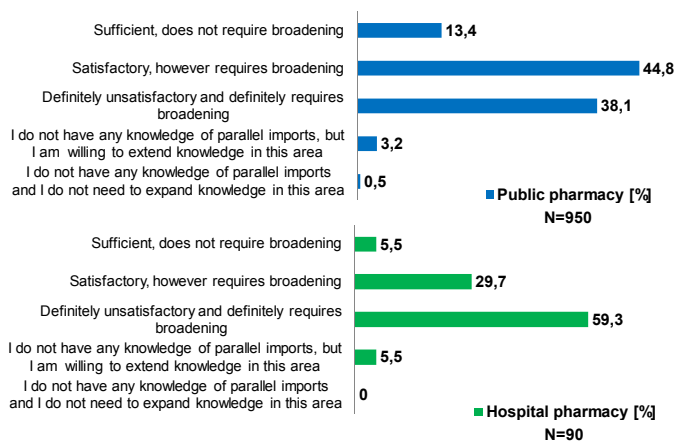


RESULTS:

The survey was conducted between May and October 2011 among public pharmacies (N=958) and hospital pharmacies (N=91).

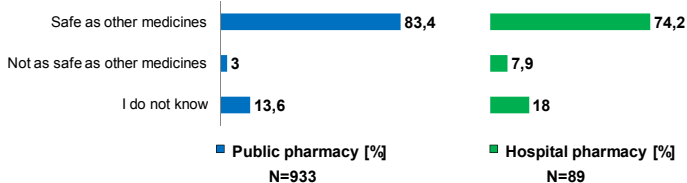
38.1 % public pharmacies and 59.3% hospital pharmacies confirmed that the level of their knowledge of parallel trade is definitely unsatisfactory and requires substantial broadening.

Figure 2. Do you think that your knowledge of parallel imports in Poland is:



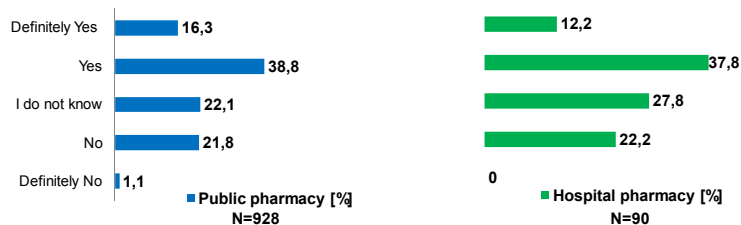
The majority of pharmacists believe medicines from parallel trade to be as safe as other medicines (83.4 %/74.2% public pharmacies/hospital pharmacies respectively).

Figure 3. Do you think that the parallel import of medicines is:



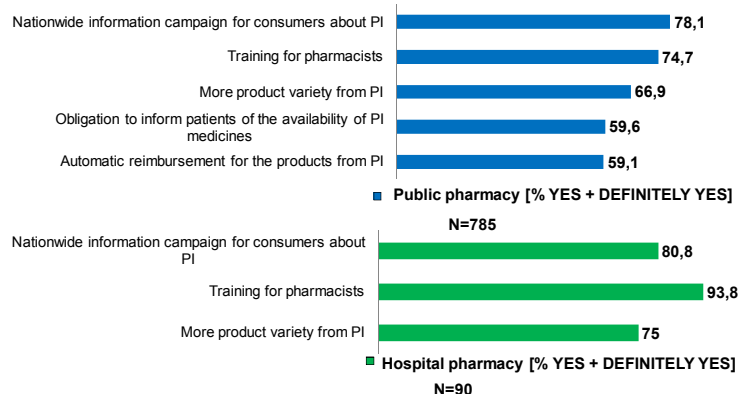
Almost 40% of pharmacists agree that the introduction of parallel trade medicines has increased competitive pressure and contributed to a decrease in the prices of medicines registered using other regulatory procedures.

Figure 3. Do you think that the introduction of medicines from parallel import contributed to price decrease of medicines registered using other procedures as a result of competitive pressure?



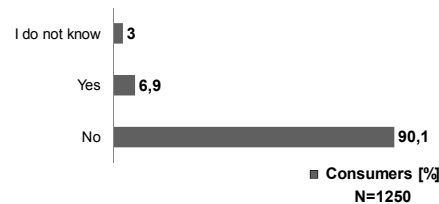
Pharmacists indicated that the most desired solutions which would support the parallel trade development in Poland are a nationwide information campaign concerning parallel trade and training for pharmacists on the legal and economic aspects.

Figure 5. The most widely approved legal/organisational/financial solutions which would support the development of parallel imports are:



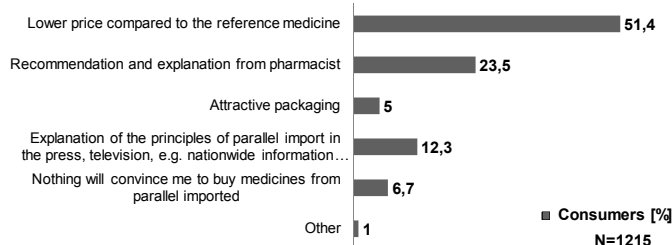
The survey among consumers revealed that 90% of respondents had not ever heard about parallel trade.

Figure 6. Have you ever heard about medicines from parallel import which are sold in black and white packaging or with stickers in Polish?



51% of consumers indicated that lower price is the most important factor in convincing them to purchase parallel trade medicines.

Figure 7. What would most convince you to a purchase of medicine from parallel import?



CONCLUSIONS:

Pharmacists have limited knowledge about parallel trade. There is a strong need for training directed at pharmacists. The hospital market is still under-explored in Poland and therefore represents a very attractive opportunity for the parallel trade development. Only 10% of consumers are familiar with the parallel trade concept which reveals the urgent need for a nationwide campaign to highlight the issue of parallel trade. Product price is the most important incentive for consumers that in convincing them to purchase parallel trade products.

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