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# The French Pharma Market 2020 – 2025 Strategic Implications for Pharma Companies

# "A rigorous analysis of the facts to support the strategic thinking of pharmaceutical companies"

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#### Mapping of key stakeholders PARLIAMENT **PAYERS** Introduces bill: (draft laws) in Votes on laws GOVERNMENT DECISION funds MAKERS LINCAM **ANSM** HAS Stakeholder behavioral trends: Policy makers & Pavers PRO\ 2020 - 2025 Trends **Driving factors Implications** SUF Global cost optimization Healthcare costs and economic turmoil Increase of the CSG (e.g., +0.9% in 2021) induced by the Covid-19 outbreak and possibility to introduce new taxes to CONS should increase healthcare expenditure reduce dependency on social . Increase of the ONDAM in the range of as a percentage of GDP from ~11.2% in contributions and thus, on the +4.5% p.a. by 2025, compared to +2.4% 2019 to 13.3% in 2025 and widen the on average between 2015 and 2020 National Health Insurance Fund deficit Redesign of the healthcare system 78% of healthcare expenditure are - Shift from hospital to home care Research of new funding mechanisms to funded by the National Health Improve hospital / open care markets ensure a better sustainability of the Insurance Fund; whose 90% of revenues coordination healthcare system are generated by social contributions Improve patient journey efficiency - Set up a new framework for funding € 19 B investment have been budgeted Reorg Drugs sales forecast by segment (2015 – 2020 – 2025) to im CAGR4 CAGR 2015-2020 2020-2025 Redu Total Market +1 5% +1 0% 29 1 Healt 27 0 8.8 Hospital sales +2 4% +2.2% 25 7.9 7.0 20 +21.6% Generics +2.5% 15 1.2 -2 9% -n 2% +1.6% +0.6% 10 atent-protected 13.6 13.1 +1.3% -0.5% 5 specific drugs 2015 2020 2025 20.0 21.2 21.8 ◀ Retail sales +1.1% +0.6%

### Contents

### Introduction

Global pharma market 2020 - 2025

- 1. The French healthcare system
  - 1.1. Key stakeholders
  - 1.2. Recent reforms
  - 1.3. Healthcare expenditure
- 2. The French pharmaceutical market
  - 2.1. Evolution of drugs sales
  - 2.2. Evolution of pharma companies' sales
  - 2.3. Future market trends
- 3. Strategic priorities for pharma companies
  - 3.1. Policy makers & Payers
  - 3.2. Physicians
  - 3.3. Pharmacists
  - 3.4. Patients & PAGs
  - 3.5. Pharma competitors

## **Executive Summary**

Strategic implications for pharma companies with a special focus on Covid-19 crisis effect

## Glossary

See detailed summary on www.smart-pharma.com/library