A change of government, tightening IP legislation and high levels of consumer confidence have boosted the market in Poland.
Introduction

Poland is a landlocked country in Eastern Europe. It is bordered by Russia to the northeast, the Baltic States (Lithuania, Latvia, and Estonia) and东欧 to the east, Germany and the Czech Republic to the south, Slovakia to the southwest, Ukraine to the northwest, and Belarus to the north. It is the fifth most populous country in Europe. The capital of Poland is Warsaw.

The healthcare system in Poland is an important part of the country's economy. The government is responsible for the majority of healthcare in Poland. The National Health Fund (NFZ) is the main payer for healthcare in Poland. It pays for healthcare services provided to residents of Poland and to permanent residents of another country registered in Poland.

Healthcare funding

The healthcare system in Poland is financed through a combination of public and private sources. The NFZ is the main provider of healthcare services in Poland. It funds healthcare services through general budget funds and state budget funds. Health insurance contributions are a significant source of revenue for the NFZ. Health insurance contributions are paid by employers, employees, and self-employed individuals. These contributions are tax-deductible for employers and employees. The NFZ reimburses healthcare providers for services provided to eligible beneficiaries.

Healthcare providers

Healthcare providers in Poland are predominantly private. There are over 10,000 private clinics and hospitals in Poland. These providers are registered with the NFZ and are eligible to receive payments for services provided to eligible beneficiaries. The NFZ reimburses healthcare providers for services provided to eligible beneficiaries.

The healthcare sector

The healthcare sector in Poland is experiencing significant growth. The healthcare sector is one of the fastest growing sectors in Poland. The healthcare sector is expected to continue to grow in the coming years. The healthcare sector is driven by an aging population, an increasing demand for healthcare services, and an improved healthcare infrastructure.

The healthcare market

The healthcare market in Poland is expected to continue to grow in the coming years. The healthcare market is driven by an aging population, an increasing demand for healthcare services, and an improved healthcare infrastructure. The healthcare market is expected to continue to grow in the coming years.

The healthcare system

The healthcare system in Poland is a public and private system. The healthcare system is financed through a combination of public and private sources. The NFZ is the main provider of healthcare services in Poland. It funds healthcare services through general budget funds and state budget funds. Health insurance contributions are a significant source of revenue for the NFZ. Health insurance contributions are paid by employers, employees, and self-employed individuals. These contributions are tax-deductible for employers and employees. The NFZ reimburses healthcare providers for services provided to eligible beneficiaries.

Healthcare providers

Healthcare providers in Poland are predominantly private. There are over 10,000 private clinics and hospitals in Poland. These providers are registered with the NFZ and are eligible to receive payments for services provided to eligible beneficiaries. The NFZ reimburses healthcare providers for services provided to eligible beneficiaries.

The healthcare sector

The healthcare sector in Poland is experiencing significant growth. The healthcare sector is one of the fastest growing sectors in Poland. The healthcare sector is expected to continue to grow in the coming years. The healthcare sector is driven by an aging population, an increasing demand for healthcare services, and an improved healthcare infrastructure.

The healthcare market

The healthcare market in Poland is expected to continue to grow in the coming years. The healthcare market is driven by an aging population, an increasing demand for healthcare services, and an improved healthcare infrastructure. The healthcare market is expected to continue to grow in the coming years.

The healthcare system

The healthcare system in Poland is a public and private system. The healthcare system is financed through a combination of public and private sources. The NFZ is the main provider of healthcare services in Poland. It funds healthcare services through general budget funds and state budget funds. Health insurance contributions are a significant source of revenue for the NFZ. Health insurance contributions are paid by employers, employees, and self-employed individuals. These contributions are tax-deductible for employers and employees. The NFZ reimburses healthcare providers for services provided to eligible beneficiaries.

Healthcare providers

Healthcare providers in Poland are predominantly private. There are over 10,000 private clinics and hospitals in Poland. These providers are registered with the NFZ and are eligible to receive payments for services provided to eligible beneficiaries. The NFZ reimburses healthcare providers for services provided to eligible beneficiaries.

The healthcare sector

The healthcare sector in Poland is experiencing significant growth. The healthcare sector is one of the fastest growing sectors in Poland. The healthcare sector is expected to continue to grow in the coming years. The healthcare sector is driven by an aging population, an increasing demand for healthcare services, and an improved healthcare infrastructure.

The healthcare market

The healthcare market in Poland is expected to continue to grow in the coming years. The healthcare market is driven by an aging population, an increasing demand for healthcare services, and an improved healthcare infrastructure. The healthcare market is expected to continue to grow in the coming years.

The healthcare system

The healthcare system in Poland is a public and private system. The healthcare system is financed through a combination of public and private sources. The NFZ is the main provider of healthcare services in Poland. It funds healthcare services through general budget funds and state budget funds. Health insurance contributions are a significant source of revenue for the NFZ. Health insurance contributions are paid by employers, employees, and self-employed individuals. These contributions are tax-deductible for employers and employees. The NFZ reimburses healthcare providers for services provided to eligible beneficiaries.

Healthcare providers

Healthcare providers in Poland are predominantly private. There are over 10,000 private clinics and hospitals in Poland. These providers are registered with the NFZ and are eligible to receive payments for services provided to eligible beneficiaries. The NFZ reimburses healthcare providers for services provided to eligible beneficiaries.

The healthcare sector

The healthcare sector in Poland is experiencing significant growth. The healthcare sector is one of the fastest growing sectors in Poland. The healthcare sector is expected to continue to grow in the coming years. The healthcare sector is driven by an aging population, an increasing demand for healthcare services, and an improved healthcare infrastructure.

The healthcare market

The healthcare market in Poland is expected to continue to grow in the coming years. The healthcare market is driven by an aging population, an increasing demand for healthcare services, and an improved healthcare infrastructure. The healthcare market is expected to continue to grow in the coming years.
Based on data received from 42 hospitals regime, according to market research and a heavily pro-generic and pro-domestic by long delays for reimbursement approval regulatory environment is characterised it difficult for companies to innovate. The developed reimbursement system make negative market conditions and poorly into line with EU legislation. amends pharma regulations bringing them regulatory environment in Poland, as it is expected to improve significantly the equipment and technologies.

While the private healthcare market has expanded, its development has been hampered by poor regulation and low. Moreover, a number of hospitals were privately owned, and competition attempt to rectify this early 2009. Low levels of enforcement, the government resumed the Act on Additional Health Insurers, which is expected to come into force in 2010. Low levels, private healthcare insurers would not be able to compete with the NFZ before 2012.

Although the private medical insurance market has expanded, is still below expectation. According to OSNSS data, the number of corporate private healthcare market enjoyed rapid growth in 2008 (13 per cent), with the or expected growth in 2009. The rate of growth is expected to slow in 2009. Many have already pay compulsory health insurance. Private healthcare well as state budget in the future.

The success in implementing the National IPR on the list is largely dependent upon its trade partners. Poland's future inclusion protection and enforcement status of US Report Watch List, which reviews the IPR persistent IPR issues.

To limit such infringements, transparency is currently causing controversy as it is not satisfying. The team for Coordinating Implementation of the Plan for 2008-2010 issued by the Action Plan for 2008-2010. The Office for Compliance and Communication Works is responsible for combating negative market conditions.

Despite a trend for market expansion, intellectual property rights (IPR) too are negative market conditions. IPR developed reimbursement system is a problem in the Polish market. In 2009, according to PMR, developed reimbursement system has remained on the Special Pharma industry.

The scope of the agency, which has increased, that the investigated products are out of and recommendation on how to reduce market opportunities.

There are also issues around patent expiry, intellectual property rights and exclusivity of data; reports that local generics are often registered before original patents expire. Hundreds of products areย inherited before original patents expire.

The Private Healthcare Market is expected to grow by 7 per cent in 2009. The rate of growth is forecast to slow in 2010 as a result of the recession, as is the number of corporate private healthcare insurers.

The rate of growth is forecast to slow in 2010 as a result of the recession, as is the number of corporate private healthcare insurers.

The Office of Health Technology Assessment (AOTM) was founded in 2005. The Agency for Health Technology and Assessment (AOTM) was founded in 2005.

The scope of the agency, which has increased, that the investigated products are out of and recommendation on how to reduce market opportunities.

There are also issues around patent expiry, intellectual property rights and exclusivity of data; reports that local generics are often registered before original patents expire. Hundreds of products areย inherited before original patents expire. Hundreds of products areย inherited before original patents expire.

The Private Healthcare Market is expected to grow by 7 per cent in 2009. The rate of growth is forecast to slow in 2010 as a result of the recession, as is the number of corporate private healthcare insurers.

The rate of growth is forecast to slow in 2010 as a result of the recession, as is the number of corporate private healthcare insurers.

The Office of Health Technology Assessment (AOTM) was founded in 2005.

The scope of the agency, which has increased, that the investigated products are out of and recommendation on how to reduce market opportunities.

There are also issues around patent expiry, intellectual property rights and exclusivity of data; reports that local generics are often registered before original patents expire. Hundreds of products areย inherited before original patents expire. Hundreds of products areย inherited before original patents expire.

The Private Healthcare Market is expected to grow by 7 per cent in 2009. The rate of growth is forecast to slow in 2010 as a result of the recession, as is the number of corporate private healthcare insurers.

The rate of growth is forecast to slow in 2010 as a result of the recession, as is the number of corporate private healthcare insurers.

The Office of Health Technology Assessment (AOTM) was founded in 2005.

The scope of the agency, which has increased, that the investigated products are out of and recommendation on how to reduce market opportunities.

There are also issues around patent expiry, intellectual property rights and exclusivity of data; reports that local generics are often registered before original patents expire. Hundreds of products areย inherited before original patents expire. Hundreds of products areย inherited before original patents expire.

The Private Healthcare Market is expected to grow by 7 per cent in 2009. The rate of growth is forecast to slow in 2010 as a result of the recession, as is the number of corporate private healthcare insurers.

The rate of growth is forecast to slow in 2010 as a result of the recession, as is the number of corporate private healthcare insurers.
### MARKET GROWTH AND GROWTH

Poland’s pharmaceutical market enjoyed impressive growth in 2008 and continued to rise in 2009, according to PharmaExpert. The higher disposable income across the middle class with disposable income, according to Datamonitor, is a key driver of growth in the market. Consumers are becoming more health-conscious and are willing to spend a greater proportion of their income on healthcare, even when generic drugs are available. The increase in health-related spending suggests that the growth will continue into 2010.

#### Key Drivers of Growth

- **Adoption of more expensive novel pharmaceuticals by doctors:** This trend is driven by the adoption of new, more expensive, innovative drugs by doctors, leading to higher prescription rates and increased sales.
- **Rising wages:** As wages rise, consumers are able to purchase more expensive healthcare products and services.
- **Greater patient awareness of health issues:** Patients are becoming more aware of the need for preventative care, leading to increased purchases of over-the-counter (OTC) products and supplements.
- **Growth of western lifestyles and culture:** The adoption of western lifestyles and culture is leading to an increase in demand for products such as dietary supplements and cosmetics.

### 2009 Reimbursement Budgets

- **Total reimbursement in 2009:** PLN 5.7bn (€1.3bn)
- **Year-on-year change:** +12.3 per cent

### Future Growth

- **Poland's pharmaceutical market:** Remains buoyant, with growth forecasted to continue at a slower rate with forecasts varying between 2.9 per cent and 7.2 per cent annually. Future growth is likely to be driven by the adoption of more expensive novel pharmaceuticals by doctors, leading to higher prescription rates and increased sales in the OTC sector.

### Market Value

<table>
<thead>
<tr>
<th>Year</th>
<th>Pharmacy Rx (PLNbn)</th>
<th>Total Pharmacy (PLNbn)</th>
<th>Total OTC Market (PLNbn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>16.2</td>
<td>24.1</td>
<td>72.0</td>
</tr>
<tr>
<td>2003</td>
<td>17.1</td>
<td>24.9</td>
<td>77.0</td>
</tr>
<tr>
<td>2004</td>
<td>18.9</td>
<td>25.7</td>
<td>80.0</td>
</tr>
<tr>
<td>2005</td>
<td>19.5</td>
<td>26.4</td>
<td>82.0</td>
</tr>
<tr>
<td>2006</td>
<td>20.9</td>
<td>27.0</td>
<td>84.0</td>
</tr>
<tr>
<td>2007</td>
<td>21.6</td>
<td>27.9</td>
<td>86.0</td>
</tr>
<tr>
<td>2008</td>
<td>24.1</td>
<td>28.4</td>
<td>88.0</td>
</tr>
</tbody>
</table>

*Source: PMR Publications, PharmaExpert, 2009*
DOMESTIC PHARMACEUTICAL PRODUCTION

The economic downturn has signalled a significant role in the European drug-containment market. An increase in pharmaceutical exports from Poland, increasing its share of drug sales in the EU, has led to an even greater demand for its exports. However, a stronger year-on-year growth was forecast for 2011.

Pharmaceutical exports in 2007 reached €1bn (around €3.6bn), exceeding US$6bn. However, Russia was the key driver in this trend, following a change of government in 2008. Poland has a production share of 1.7 per cent of the value of Polish pharmaceutical exports. The total value of pharmaceuticals exported in 2008 was 28 per cent of the value of imports, whereas in 2007, it was only 23 per cent. The Polish government has also taken steps to increase the value of imports.

The leading pharma companies in Poland in 2008 were Novartis, GlaxoSmithKline (GSK) and Polpharma, according to Datamonitor. Polpharma is the largest domestic manufacturer of drug and active pharmaceutical ingredients (APIs). Novartis topped the list with a 5.1 per cent share of pharmaceutical sales. The company’s sales in Poland reached 23 per cent of Novartis’ worldwide sales. The company’s sales in Poland doubled in 2008, reaching €60m. GlaxoSmithKline (GSK) was second in the Polish market with a 5.1 per cent share of pharmaceutical sales. It is the largest investor in Central and Eastern Europe, having invested €1bn in its Polish operations. GSK’s sales in Poland reached €354m in 2008.

The Polish generics market is one of the most developed in Europe, with a significant role in the European market. The country is likely to continue to play a key role in the European market in the future. The Polish generics market is one of the most developed in Europe, with a significant role in the European market. The country is likely to continue to play a key role in the European market in the future.

The strength of the generic market is attributed to limited availability of branded pharmaceuticals prior to the fall of Communism in 1989, and short periods for access to the market. The Polish government has also taken steps to increase the value of imports. The Polish government has also taken steps to increase the value of imports. The Polish government has also taken steps to increase the value of imports. The Polish government has also taken steps to increase the value of imports.
### OPERATING COMPANIES AND MARKET DEVELOPMENT CONTINUED

The Polish pharmaceutical industry has undergone multiple changes in recent years. The government has a direct role in the industry, with the state-owned companies having a significant influence. According to Research and Markets, some of the state-owned companies have been sold to private interests, but others remain state-owned.

### PHARMACEUTICAL MARKETING

With increased consumer wealth fueling higher OTC sales, pharmaceutical companies are looking for new ways to market their products. One example is a direct-to-consumer approach, which has been gaining popularity in recent years.

### OLIGARCHY OF THE PHARMACEUTICAL INDUSTRY

The Polish pharmaceutical industry has undergone multiple changes in recent years. The state seeks to increase transparency, and officials must now be recorded as such. The state has also led to opportunities for companies looking for contract manufacturing opportunities.

### THE GOVERNMENT STRATEGY FOR 2009-11

The government strategy for 2009-11 includes the introduction of new regulations to limit the use of OTC products. The government also plans to focus on improving the distribution and storage of products, as well as on computerisation of patient records and prescriptions.

### PATIENT ACCESS TO MEDICATIONS

Increased consumer wealth is fueling higher OTC sales. Pharmaceutical companies are looking for new ways to market their products, such as online distribution.

### BUSINESS OUTLOOK

The business outlook for the Polish pharmaceutical industry remains challenging. However, there are upsides for companies looking for business opportunities, such as online distribution and contract manufacturing.

---

### Table: Top 10 Drug Manufacturers, 2007-2008

<table>
<thead>
<tr>
<th>Company</th>
<th>Sales, 2007 ($m)</th>
<th>2008 ($m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Novartis</td>
<td>395</td>
<td>540</td>
</tr>
<tr>
<td>GlaxoSmithKline</td>
<td>342</td>
<td>375</td>
</tr>
<tr>
<td>Sanofi-aventis</td>
<td>322</td>
<td>330</td>
</tr>
<tr>
<td>Roche</td>
<td>294</td>
<td>300</td>
</tr>
<tr>
<td>Servier</td>
<td>288</td>
<td>300</td>
</tr>
<tr>
<td>Sanofi-Aventis</td>
<td>259</td>
<td>294</td>
</tr>
<tr>
<td>Johnson &amp; Johnson</td>
<td>227</td>
<td>200</td>
</tr>
<tr>
<td>Pfizer</td>
<td>190</td>
<td>234</td>
</tr>
<tr>
<td>Bayer</td>
<td>167</td>
<td>180</td>
</tr>
<tr>
<td>Merck &amp; Co</td>
<td>127</td>
<td>125</td>
</tr>
</tbody>
</table>

*Full-year sales 2008 are estimated based on double the actual value of Q1 and Q2 2008 sales.*