

PRESS RELEASE

Paris, 22 January 2014

12TH AFIPA BAROMETER ON SELFCARE PRODUCTS:

AN IMBALANCED AND CONTRASTED SITUATION FOR PRODUCTS IN THE SELFCARE MARKET

Reflecting AFIPA's shift towards selfcare products (medicines, medical devices and self-medication food supplements)¹, AFIPA (the French Federation of the Pharmaceutical Industry for Responsible Self-Medication) has for the first time published the 2013 figures for this market. Carried out by Celtipharm, the 12th Barometer shows **an imbalance between self-medication drugs on the one hand and medical devices and food supplements on sale in pharmacies on the other.**

Total sales of self-medication drugs, at retail price and including VAT, amounted to "2.123 billion in 2013, a 3% decline compared to 2012. In contrast, medical devices and food supplements experienced more favourable conditions, with an increase in sales of 4.3% and 6.2% respectively.

Self-medication drugs: a declining and weakened market

The 12th Self-Medication Barometer 2013, carried out on the Celtipharm Xpr-SO® panel of 3,004 pharmacies representative of French pharmacies overall, shows that **medicines sold without a prescription experienced a decline of 3% in 2013 in sales value, representing a market of over €2 billion.** Having experienced significant dynamism and continuous growth to date, the self-medication drugs market experienced its **first involution in five years**, as the result of a difficult economic environment. All segments of this market were impacted in the same manner, undergoing a sharp decline in sales.

Despite this situation, **the price of self-medication drugs has continued to drop in constant euros for the past 6 years² and the price differentials between pharmacies have also been reduced.** At the same time, free access has confirmed its positive effect on prices: pharmacies with a specific free access area have been able to practise more dynamic pricing than others.

Self-medication medical devices and food supplements: dynamic and growing markets

In contrast to self-medication drugs, medical devices and food supplements sold in pharmacies are experiencing **positive and significant growth**, with a 4.3% increase in over the counter sales value for medical devices and a 6.2% increase for food supplements. **The various segments in these markets reflect a similar dynamism overall** with, for example, a 12.3% increase for vitamins and minerals in the food supplements sector.

¹ The selfcare products represented by Afipa are aimed at individuals who wish to play a role in their own health care or well-being, generally speaking with the advice of a health care professional. They include medicines for which a medical prescription is optional and which are not reimbursed, medical devices (for which a prescription is optional or unnecessary and which are not reimbursed) and food supplements (available without a prescription).

² Growth of 6 points in the index of prices for non-reimbursed OTC medicines, compared to an increase of 8.6 points in the consumer price index (INSEE).

TOP 10 pharmas in the self-medication market in 2013

(By sales value in " : retail price including VAT)

1. Sanofi
2. Boiron
3. Johnson & Johnson Santé Beauté
4. BMS-UPSA
5. Bayer Santé Familiale
6. Pierre Fabre
7. Reckitt Benckiser Healthcare
8. Cooper
9. Boehringer Ingelheim France
10. Merck Médication Familiale SAS

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A stagnating selfcare market

Thanks to the results achieved by self-medication medical devices and food supplements, **the selfcare products market was stable with a turnover of €3.351 billion in 2013.**

Support for the self-medication drugs market is crucial

While medical devices and food supplements sold in pharmacies have emerged from the current economic situation unscathed, the situation for the self-medication drugs market is quite different and raises concern.

For Pascal Brossard, AFIPA Chairman: *This setback for self-medication drugs represents a real danger for the organisation and efficiency of the health care system, both in terms of cost for the French social security system and in terms of an increased workload for GPs. As a result, support from the authorities and the rapid launch of concrete actions, in particular through the work of the sector's Strategic Council, are necessary and critical, now more than ever. Expanding the list of products available under self-medication, improved patient information, and adequate training of health care professionals have emerged as the priorities in ensuring the development of responsible self-medication and in allowing France to catch up with the rest of Europe.*

Why is AFIPA shifting its representation towards selfcare products?

Self-medication drugs, medical devices and food supplements sold in pharmacies all offer individuals a range of possibilities in treating symptoms or improving their well-being. For example, it is possible to treat a cough with a drug, a food supplement or a self-medication medical device.

The evolution of AFIPA's representation towards such health care specialities therefore addresses a real and growing need from patient-consumers.

AFIPA, a Public Health actor, is the professional body that represents the industry responsible for producing and marketing health care products on sale in pharmacies without a prescription (medicines, medical devices and food supplements used in self-medication).

ABBOTT, ALMIRALL, BAYER HEALTHCARE SAS FRANCE, BOEHRINGER INGELHEIM, BOIRON, BOUCHARA RECORDATI, BRISTOL-MYERS SQUIBB . DIVISION UPSA, DERMOPHIL INDIEN, DIEPHARMEX, EXPANSCIENCE, GALDERMA, GENEVRIER, GIFRER BARBEZAT, GSK SGP, HEPATOUM, HRA PHARMA, JOHNSON&JOHNSON SANTE BEAUTE FRANCE, LABCATAL, LEHNING, MAYOLI SPINDLER, MERCK MEDICATION FAMILIALE, NEGMA LERADS, NOVARTIS SANTE FAMILIALE, NUTRITION ET SANTE, OMEGA PHARMA, PFIZER SANTE FAMILIALE, PIERRE FABRE SANTE, PROCTER & GAMBLE PHARMACEUTICALS FR, RECKITT BENCKISER, ROTTAPHARM MADAUS, SANOFI-AVENTIS FRANCE, SEMES S.A, TONIPHARM, URGO, WELEDA, ZAMBON FRANCE.

www.afipa.org

Self-medication: Medicinal products for self-medication are defined as those which do not require a medical prescription and which are produced, distributed and sold primarily with the intention that they will be used by consumers on their own initiative and responsibility, when they consider such a use appropriate (WHO 2000 definition).

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