

SELF-MEDICATION: FRANCE STILL NOT IN LINE WITH EUROPEAN POLICY

4th EUROPEAN SELF-MEDICATION OBSERVATORY, 2016 AND 16th BAROMÈTER OF SELFCARE PRODUCTS, 2017

Following the publication of the latest results regarding selfcare and self-medication products, Afipa takes a strong stand against incoherent measures which go against the interest of the patients, and asks to meet the Minister of Health.

4th EUROPEAN SELF-MEDICATION OBSERVATORY – 2016 (1) FRANCE LAGGING BEHIND, CAUSING PATIENTS TO MISS OPPORTUNITIES

Similarly to past Observatory publications, the self-medication market share in France is still one of the smallest in Europe.

The development dynamics regarding self-medication in France have dramatically slowed down since 2010: only one national switch occurred between 2012 and 2014, versus 6 in 2010.

Analysing the European switches (a process which makes medication accessible over the counter) has shown discrepancies ranging from 6 years⁽²⁾ to 14 years⁽³⁾ compared with pioneer countries.

The analysis has also shown that, based on the scope of switched molecules in at least one of the 8 countries in the survey, 92 molecules could be made available over the counter in France for pathologies such as migraine or allergies; this would enable patients to quickly access efficient treatment, with pharmacist advice.

And yet, the prices of self-medication products in France – which is regulated by competition between pharmacies – is among the lowest in Europe. In 2017, the OTC pricing trend in France was even lower than the consumer price index.

2 INDISPENSABLE CONDITIONS TO PROPERLY CONTROL SELF-MEDICATION: WE NEED TO SUPPORT AND INFORM THE PATIENTS:

Although certain aspects may be country-specific, all European systems face the same healthcare challenges: the issues are economic or demographic, or relate to the accessibility of care.

The European Commission is fully aware of these issues, and considers self-medication as a possible regulation tool.

This initiative has led to the publication of a report on the promotion of responsible self-medication in Europe⁽⁴⁾.

Certain countries such as the United Kingdom or Sweden have grasped the full interest of self-medication as a tool to regulate the healthcare chain, and are already implementing prevention actions based on this approach.

Self-medication results (value)

- Self-medication market share stable in France: 12.9% in 2016 (13% in 2015) versus 23.5% on average in Europe.
- Average price 4.74€ in France versus 5.81€ in Europe.

UNITED KINGDOM



STAY WELL
THIS WINTER

A multi-channel campaign (television, radio and social media) launched by the British healthcare authorities to encourage patients to seek advice from a pharmacist to deal with winter illnesses.

SWEDEN



Deployment of specific tools by the medicine industrials and pharmacist representatives in order to geo-position epidemics and thereby launch very local awareness operations (information and advice on winter illnesses).

16th BAROMÈTER OF SELFCARE PRODUCTS – 2017 (5)

PHARMACIES ARE ABLE TO MAINTAIN THEIR ACTIVITY THANKS TO SELFCARE

Selfcare today represents nearly 11% of the total sales of pharmacies; the market is undergoing structural growth, in line with the transformation trend of our healthcare consumption.

Certain selfcare products – especially medical devices and food supplements – which are not dependent on seasonal health issues (those dealing with sleep, relaxation, etc) compensate for the decrease in medical prescriptions over the past year.

Regarding self-medication medicines – a sector which is globally decreasing - 2 segments show a decrease because of this year's less severe winter illnesses (a later gastro-enteritis period and lighter seasonal allergies): respiratory issues (-8.4%) and pain killers (-4.1%). These numbers show how season-dependent selfcare products may be, and illustrate how reasonably these products are used by the French people.

During the last quarter of 2017, certain medicines containing codeine or dextromethorphan were switched back to the prescription medicine category: this impacted the sales of the self-medication medicines, which decreased by 28% and 47% respectively, compared to the last quarter of 2016.

Food supplements show the largest increase of the selfcare market.

Selfcare results in France :

- Total sales 3.9 billion €, representing a 0.8% increase of which :
- Self-medication sales: - 3.7% in value, reaching 2 240 M€
- Medical device sales: +3.5%, reaching 845 M€
- Food supplement sales: +12.1%, reaching 825 M€

Pharmacies results in 2017:

- Total sales of pharmacies: 36.2 M€
- Selfcare share of the total sales of pharmacies: 10.8%
- Decrease in the share of prescriptions (-0.4%, reaching 29.1 M€)

WHAT IS SELFCARE ?

Selfcare is a behaviour by which individuals deal with their own minor health issues and well-being. Responsible self-medication is a component of selfcare..

For Afipa, selfcare is associated with 3 categories of products, available over the counter and in pharmacies: self-medication medicines, medical devices and food supplements.

WHAT IS SELF-MEDICATION ?

Self-medication is a behaviour by which individuals deal with their own illness by taking self-medication medicine which is authorised, over-the-counter, safe and efficient in the use conditions indicated, with pharmacist advice (World Health Organization definition, year 2000).

FRANCE STILL NOT IN LINE

AFIPA SOUNDS THE ALARM

Whereas in other European countries, governments are promoting the development of self-medication and launching education campaigns, in France, no such measures have ever been taken by the public authorities.

Our country is lacking a strong will to promote a real self-medication policy, in spite of the National Health Strategy defined for 2017-2022, which places prevention and promotion of health at top-priority level. Without such a political will and support, France will continue to lag behind.

Afipa notes the detrimental lack of tangible measures and incoherent technical decisions, in contradiction with the evolution of society, which go against the interest of the patients and show a total lack of knowledge of the self-medication sector (ban on advertising and switches back to prescription medicine).

Although it is fully relevant to use self-medication as a way of regulating the healthcare chain and reducing the workload of saturated medical practices (59% of the GPs consider that the development of responsible self-medication would enable them to reduce congestion in their waiting rooms)⁽⁶⁾ our French healthcare system is still not in line with the measures taken in other European countries.

EXCERPT OF AFIPA'S LETTER TO AGNÈS BUZYN, MINISTER OF SOLIDARITIES AND HEALTH, DATED 2 OCTOBER 2017

The development of responsible, citizen self-medication is perfectly in line with the first two objectives of the National Health Strategy: prevention and promotion of health. In addition, it addresses territorial and financial inequalities regarding access to healthcare. Afipa proposes a model which places self-medication as the first step of the healthcare process, enabling individuals to be active players of their own healthcare.

It is therefore crucial to launch a major general public awareness campaign at national level, focused on explaining the appropriate reflexes regarding healthcare and, in particular, self-medication.

This prevention action can only take place with strong pharmacist support, in particular via the pharmaceutical record which reinforces and controls the proper use of medicines.

Furthermore, responsible self-medication is a credible, efficient way of improving access to healthcare for all, and of limiting the dramatic impact of expanding medical deserts.

COMMON SENSE HAS BEEN LEFT ASIDE

And yet, there are in France easily-implementable solutions and measures to develop responsible self-medication. Here are those proposed by Afipa:

- Integration of selfcare as first step of the healthcare process for minor health issues
- Systematic indication of self-medication medicines in the pharmaceutical record
- Definition of a protocol regarding pharmacist advice, acknowledging the essential role of the pharmacist' support in the healthcare process
- Acknowledgment of the brand as a security factor enabling patients to self-medicate
- Education measures regarding responsible self-medication, acknowledging the patient's role as an active player of his own healthcare
- Development of a healthcare offer via switches in line with the other European countries
- Following the letter sent by Afipa to the Minister of Health (see right), the federation requests to meet the minister, in order to discuss a real policy to promote the right of each individual to be an active player of his own healthcare.

Afipa is therefore calling upon the government, the healthcare professionals and the patients to demonstrate common sense and responsibility, in order to place responsible self-medication as first step of the healthcare process. We hope that in 2018, self-medication will be properly taken into consideration and that its potential will be fully exploited. The federation calls upon Minister Agnès Buzyn to make this change in line with the new National Health Strategy.

Afipa is the professional federation representing the companies which produce and commercialise healthcare products available over the counter in pharmacies (self-medication medicine, medical devices and food supplements)

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1- Survey conducted in 2016 in the following countries : Germany, Belgium, Spain, France, Italy, the Netherlands, the United Kingdom, Sweden.

2- Source : AESGP. ex. 1992 switch of ketoconazole in Germany vs 1998 in France.

3- Source : AESGP. 1992 : switch of loratadine in Sweden vs 2006 in France.

4- Report of the working group on promoting good governance of non-prescription drugs in Europe.

5- Survey conducted in 2017 over 10 328 pharmacies representing the pharmacies in France mainland.

6- « Les Français, les médecins généralistes et l'automédication responsable » The French people, the General Practitioners and Responsible Self-Medication, Ipsos survey for Afipa - December 2015.