



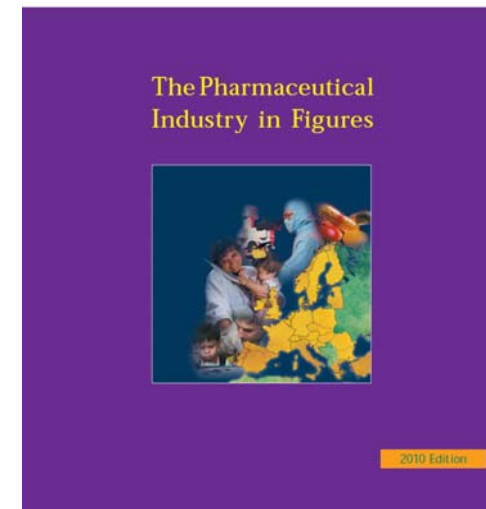
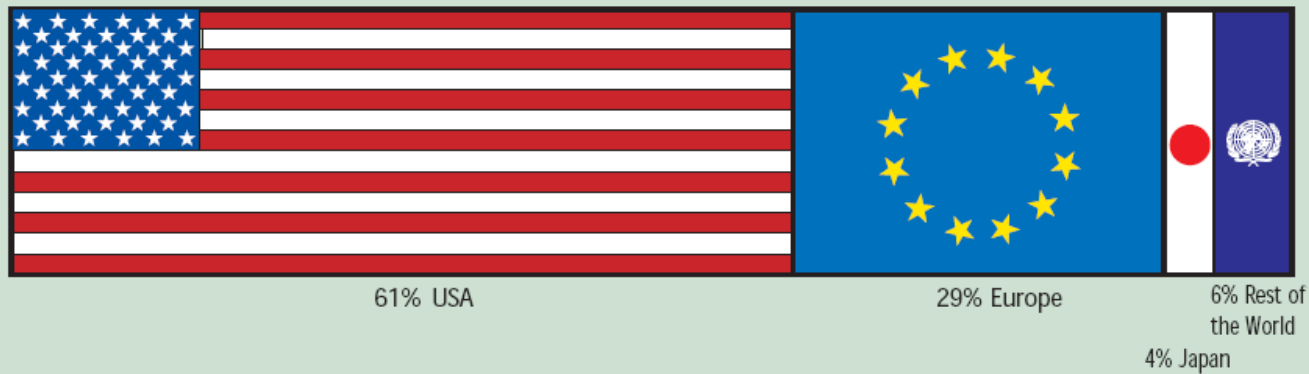
Prise en Charge de nouvelles problématiques Pour être dans l'anticipation

Formation en Filiale : de l'influence du Corporate ...

Thierry Marquet

Médecin Formateur Consultant, Président d'Honneur de l'AFIP

**GEOGRAPHICAL BREAKDOWN (BY MAIN MARKETS) OF SALES OF NEW MEDICINES
LAUNCHED DURING THE PERIOD 2005-2009**



La Pharma : une concentration des centres décisionnaires

« *Think global, act local* »



Corporate

Décision

**Plateforme
Europe**

Filiale

Conviction

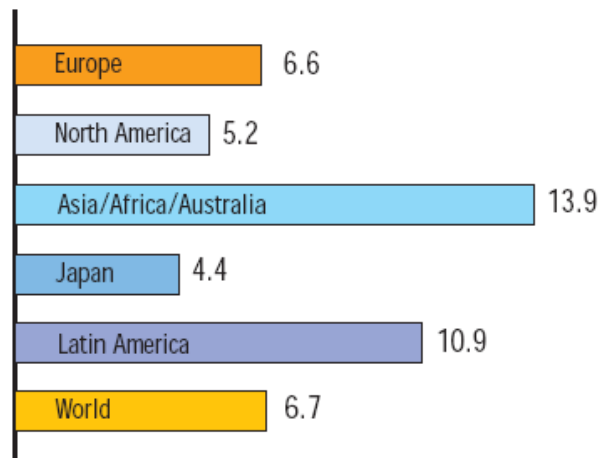
La Pharma : une concentration des centres décisionnaires



« Think global, act local ... »

« Think global, act local »

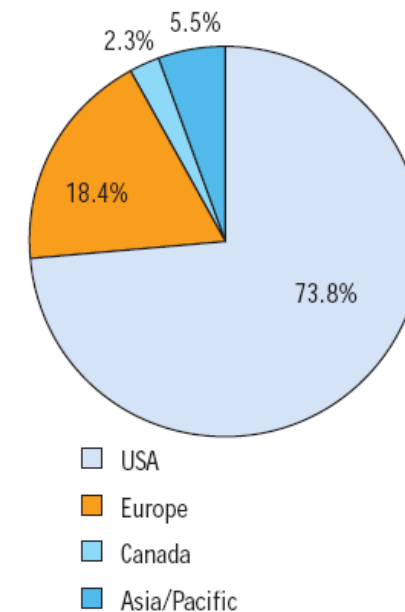
GLOBAL PHARMACEUTICAL MARKET BY REGION
AVERAGE GROWTH RATE FOR THE PERIOD 2004-2009 (%)



Source: IMS Health Market Prognosis, March 2010

Note: IMS audited and unaudited markets, constant average growth rates (constant US \$)

SHARE OF GLOBAL BIOTECHNOLOGY REVENUES, PUBLIC COMPANIES (2008)



Source: Ernst & Young, 'Beyond Borders, Global Biotechnology Report 2009' (data relate only to publicly traded companies)



www.afip-formateurs.com

L'Enjeu : l'attractivité de la France !

Le club des formateurs des industries de santé

« *Think global, act local* »



INTERNATIONAL
TRADE
ADMINISTRATION



University of Texas at Austin
International Drug Development
Conference

February 22-27, 2010
Austin, Texas

Topic: Challenges Related to Globalization for the
Pharmaceutical Industry

Jeffrey Gren, Director
Office of Health and Consumer Goods
U.S. Department of Commerce

Summary and Conclusions

- Pharmaceutical industry has become globalized and complex in recent years
- Industry changes provide opportunities as well as challenges
- Challenges require a coordinated and global approach

« *Think global, act local* »

Table 2. Leading world pharmaceutical markets in 2005

Position	Markets	Value in billion \$
1.	USA	248
2.	Japan	67
3.	Germany	29
4.	France	26
5.	United Kingdom	17
6.	Italy	16
7.	Canada	14
8.	Spain	12
9.	Brazil	9
10.	Mexico	8

Source: own estimation, according to World Review 2005

« Think global, act local »

Globalization of the Pharmaceutical Industry: Top 10 Pharmaceutical Markets 2008

	Sales US\$BN	Market Share %
Pfizer (incl. Wyeth)	63.2	United States
GSK	43.0	United Kingdom
Sanofi-Aventis	38.7	France
Merck (incl. SP)	37.8	United States
Novartis	36.0	Switzerland
Astra-Zeneca	31.6	United Kingdom
Roche (incl. Genentech)	31.5	Switzerland
J&J	24.6	United States
Eli Lilly	19.3	United States
Bristol-Meyers Squibb	17.7	United States

(Source: IMS 2008)

« *Think global, act local* »

Global Pharmaceutical Market Growth to 2012 (US\$ Constant)

Mature Markets 2007-2012	
USA	3-6%
Japan	1-4%
France	3-6%
Germany	3-6%
Italy	2-5%
UK	2-5%
Spain	5-8%
Canada	5-8%

Source: IMS Health Market Diagnosis

« *Think global, act local* »

Global Pharmaceutical Market Growth to 2012 (US\$ Constant)

Emerging Markets 2007-2012	
China	18-21%
Brazil	8-11%
Turkey	13-16%
Russia	16-19%
India	11-14%
Korea	8-11%
Mexico	6-9%

Source: IMS Health Market Diagnosis



April 9, 2008

India's pharmaceutical industry on course for globalisation

Booming sales. India is gaining in importance as a manufacturer of pharmaceuticals. Between 1996 and 2006, nominal sales of pharmaceuticals were up 9% per annum and thus expanded much faster than the global pharmaceutical market as a whole (+7% p.a.). Demand in India is growing markedly due to rising population figures, the increasing number of old people and the development of incomes. As a production location, the country is benefiting from its wage cost advantages over western competitors also when it comes to producing medicines.

India has discovered the world market. Since the end of the 1980s India has been exporting more pharmaceuticals than it imports. Over the last ten years the export surplus has widened from EUR 370 m to EUR 2 bn. At 32% in 2006, the export ratio was about twice as high as in 1996 and will likely rise further in the coming years (Germany: 55% at present).



**World Health Organization
Essential Drugs and Medicines Policy**

- Montée en puissance des Formations centralisées
 - Marketing produit centralisé (Europe/Corporate)
 - E-Learning & FAD +++ (développement de boîtes presta Internationales)
 - Déclinaison filiale de la Formation « Traduction »
 - Produit : « training Binder »
 - Techniques de Communication & de Promotion
 - Environnement Santé / Health Eco = espace de souveraineté en filiale ...?
 - France = Gouvernance Hôpital / Loi HPST / Education & Accompagnement Thérapeutique / Prévention & Santé Publique

Quid de la moulinette Réglementaire ... ?

- Charte VM (idem Code EFPIA & Charte IFPMA)
- Certif Qualité VM non Iso ...
- E-Learning & CNIL ...



Quid de la moulinette « Légale » ... ?

- DIF, OPCA, CIF, VAE, Plan Sénior, 2483 ...
- Work Council Union requirements = Comité d'Entreprise & plan de formation ...



Comment, malgré tout rester dans une dynamique collaborative avec le Global ???

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PARTICIPATION DES EMPLOYEURS AU DÉVELOPPEMENT DE LA FORMATION PROFESSIONNELLE CONTINUE (Employeurs ayant au moins dix salariés)

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International
Federation of
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Associations



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Welcome to the IFPMA
Representing the R&D pharmaceutical industry, including the biotech and vaccine sectors



Photo: Eisai Co., Ltd.

Tokyo, 20 September 2010

[+] earlier items

IFPMA President's Article on Industry Contributions to UN Millennium Development Goals Published

[Online article](#) (website)

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