

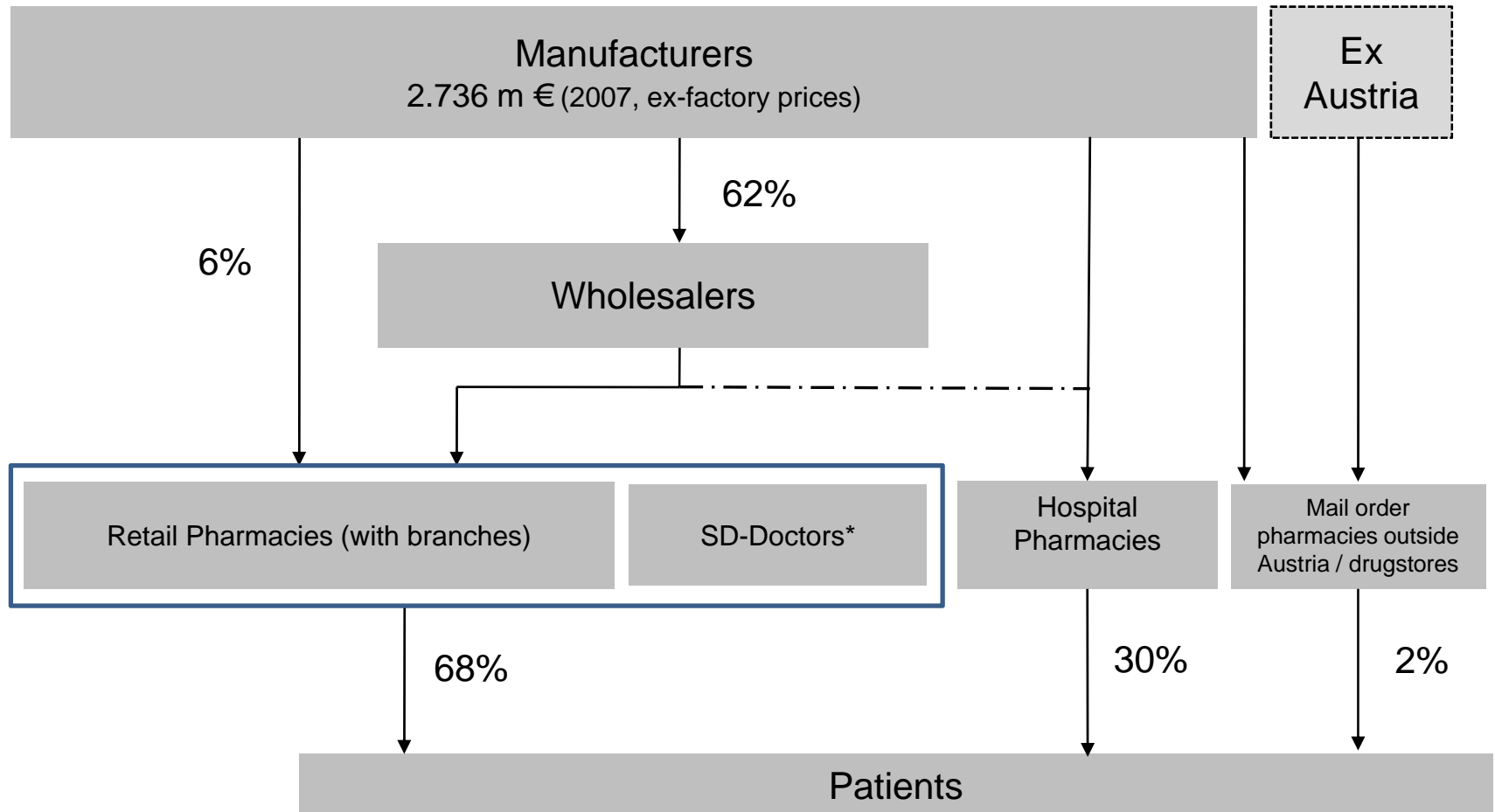
A map of Europe with most countries colored in light yellow. Austria is highlighted in a bright pink color. The surrounding oceans and seas are colored in a light blue. The map shows the outline of Europe, including the British Isles, Scandinavia, and the Mediterranean region.

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# European Pharmaceutical Distribution Fact Book

**Country Sample Austria**

August 2009



\* Self Dispensing Doctors

## VAT

**10%**

since January 1<sup>st</sup>, 2009

## Pharmacy margin

**29,8%**

19,16 % reimbursement market

## Wholesaler margin

**9,0% total market**

9,4% reimbursement market

- pharmacies are remunerated via a statutory regressive mark up scheme applicable to all pharmaceuticals
- Since 1 January 2004 there are two different schemes applied:
  - one scheme using reduced mark ups for “privileged customers” (sickness funds, the State, the Austrian Länder or communities)
  - a basic scheme for “private customers”, on which an additional flat “private customer mark up” of 15% is added

- Wholesalers are remunerated via a statutory regressive mark up scheme applicable to all pharmaceuticals
- From 1 January 2004, there are different mark up schemes for pharmaceuticals included in the yellow or green boxes of the EKO (positive list) and for all other pharmaceuticals
  - Red box: newly launched pharmaceuticals and pharmaceuticals that apply for reimbursement
  - Yellow box: pharmaceuticals fulfilling certain criteria (e.g. specific disease or age group)
  - Green box: pharmaceuticals qualifying for automatic reimbursement

... 68 % of pharmaceuticals are sold through pharmacies or branch pharmacies and self-dispensing doctors

	2000	2001	2002	2003	2004	2005	2006	2007	2008
<b>Pharmacies</b>	1.106	1.133	1.147	1.160	1.182	1.191	1.184	1.200	1.233
<b>SD Doctors</b>	987	998	982	993	989	992	992	978	962
<b>Hospital pharmacies*</b>	5	5	5	5	5	5	5	5	5

\* dispensing directly to patients

## Pharmacy Chains

Multiple ownership of pharmacies is not allowed in Austria, but a pharmacist may open one branch pharmacy, which practices under the supervision of a main pharmacy

## Pharmacy ownership

The right to own a retail pharmacy in Austria is statutorily reserved to pharmacists with a university degree.

## Internet Mail Order

Internet pharmacies are not permitted in Austria, but private consumers are allowed to order at mail-order pharmacies outside Austria.

## Drugstores/supermarket

Drugstores and supermarkets are only allowed to sell a very restricted range of non-pharmacy OTC pharmaceuticals

## Direct sales

Direct sales of pharmaceuticals from manufacturers to pharmacies were around 5,8% in 2007.

## Rebates

Rebates (in cash) from wholesalers to pharmacies are quite common in Austria, whereas rebates from manufacturers to pharmacies are not. The situation is different for hospitals of which around 99% get cash rebates from the manufacturers.



**Kwizda**

Kwizda Pharmahandel GmbH



**JACOBY**

Range of Services

Full-line wholesaler  
Pharma logistics  
Pharmacy support services

Full-line wholesaler  
Pharma logistics  
Pharmacy support services

Full-line wholesaler  
Pharma logistics  
Pharmacy support Services

Full-line wholesaler  
Pharmacy support services

Revenue

956 Mio € (2007)

430 Mio. € (2007)

326 Mio € (2007)

154 Mio. € (2007)

Market share

44%

20%

15%

7%

Profit margin\*

3,65%

1,15%

1,14%

2,14%

# employees / outlets

960 (2007) / 7 (2008)

350 (2007) / 5 (2008)

167 (2008) / 4 (2008)

> 150 (2007) / 3 (2008)

Ownership

100% Celesio AG

Family owned

100 % Phoenix Group

Family owned

\* before tax

**Wholesaler revenue: 2,2 bn € (2007)**

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<b>European Pharmaceutical Distribution Fact Book Total Report</b>	<b>1000,00 €</b>
<b>European Pharmaceutical Distribution Fact Book Country Profile – France (6 pages )</b> European Standard Pharmaceutical Distribution Chain European Pharmaceutical Distribution Channel Shares (data 2007) Country Profile - France Pharmaceutical Distribution Chain Pharmaceutical Margins and Taxes Pharmaceutical Wholesaler Landscape (OCP, Alliance Healthcare, CERP / data 2007) Pharmaceutical Retail Landscape	<b>250,00 €</b>
<b>European Pharmaceutical Distribution Fact Book Country Profile – Germany (6 pages )</b> European Standard Pharmaceutical Distribution Chain European Pharmaceutical Distribution Channel Shares (data 2007) Country Profile - Germany Pharmaceutical Distribution Chain Pharmaceutical Margins and Taxes Pharmaceutical Wholesaler Landscape (Phoenix, ANZAG, GEHE, Sanacorp / data 2007) Pharmaceutical Retail Landscape	<b>250,00 €</b>

Pricing & Options <i>continued</i>	
<p><b>European Pharmaceutical Distribution Fact Book</b>  <b>Country Profile – Italy</b> (<i>6 pages</i> )                      European Standard Pharmaceutical Distribution Chain                      European Pharmaceutical Distribution Channel Shares (data 2007)                      Country Profile - Italy                      Pharmaceutical Distribution Chain                      Pharmaceutical Margins and Taxes                      Pharmaceutical Wholesaler Landscape (Comifar, Farmintesa, Alliance Healthcare, Unico / data 2007)                      Pharmaceutical Retail Landscape</p>	<p><b>250,00 €</b></p>
<p><b>European Pharmaceutical Distribution Fact Book</b>  <b>Country Profile - United Kingdom</b> (<i>6 pages</i> )                      European Standard Pharmaceutical Distribution Chain                      European Pharmaceutical Distribution Channel Shares (data 2007)                      Country Profile - United Kingdom                      Pharmaceutical Distribution Chain                      Pharmaceutical Margins and Taxes                      Pharmaceutical Wholesaler Landscape (AAH, Alliance Healthcare, Phoenix / data 2007)                      Pharmaceutical Retail Landscape</p>	<p><b>250,00 €</b></p>

<b>Pricing &amp; Options</b> continued	
<p><b>European Pharmaceutical Distribution Fact Book</b> <b>Company Profiles</b> (10 pages) European Pharmaceutical Wholesaler Market Shares (Top 3) Company Profiles: Phoenix Group – AllianceBoots - Celesio AG</p>	<p><b>250,00 €</b></p>
<p><b>Bespoke profiles for other European countries can be done by request.</b></p> <p>Inquiries: Rita Weissenberger or Petra Graschi i2k Services GmbH Bocksdornstraße 27 80935 Munich Germany T.: ++ 49-700-425425425 Email: reports@i2k-services.com For further information please refer to: <a href="http://www.i2k-services.com/12.html">http://www.i2k-services.com/12.html</a></p>	