Welcome to the latest edition of The Market Partner, which highlights what is new at Zuellig Pharma and in healthcare throughout Asia.

In this issue, our Feature Story looks at the effects of the rising prevalence of non-communicable diseases and the absence of patient-centric public prevention and disease management programs. This has given private healthcare players an opportunity to step up and create more immediate solutions.

OTC specialist Nicholas Hall & Company analyzes key trends and developments in Asia Pacific’s consumer healthcare market in 2015, covering Rx-to-OTC switch activity, mergers and acquisitions, and regulatory harmonization.

Meanwhile, a Spotlight article takes a look at our in-house PharmaLink Academy that provides our sales managers with the right tools and training to effectively develop their sales force and provide successful commercialization services for our clients.

In addition, I am delighted to bring you a selection of other news about Zuellig Pharma from around the region. This issue includes the renewal of our long-standing regional partnership with GlaxoSmithKline, the launch of the innovative eZCooler cold chain packaging system in Vietnam, and the GSDP certification of our warehouse in Phnom Penh, Cambodia.

I wish you a happy holiday season and continued success in 2016.

John Davison
Chief Executive Officer
Zuellig Pharma
Zuellig Pharma renews major regional contract with GSK

Zuellig Pharma, Asia’s leading healthcare services provider, and GSK, one of the world’s leading research-based pharmaceutical companies, have re-committed to their current distribution partnership in Asia worth over US$1 billion in annual sales. The agreement, which covers 10 key markets across North and Southeast Asia, paves the way for the two companies to explore new areas of partnership and innovation in Zuellig Pharma’s core distribution service, as well as its fast-evolving new areas of healthcare solutions.

Discussions between the two companies are underway to flesh out details of several key strategic initiatives, notably ways to enhance market reach and patient access, cold-chain innovation to enhance GSK’s end-to-end vaccine management, data analytics to explore new ways in which data can be leveraged to further empower how GSK interacts with and serves its customers and patients and various other areas of digital technology to bring to bear Zuellig Pharma’s cutting edge e-commerce platform eZRx.

“We are confident that Zuellig Pharma will continue to invest in and develop its distribution capabilities, as well as keep quality and compliance very high on its list of priorities, which is of key importance to GlaxoSmithKline,” said Ms. Jo LeCouilliard, GSK Senior Vice President & General Manager Asia-Pacific.

“GSK and Zuellig Pharma have been partners for decades in some of the Asian markets. The renewed partnership is proof of the trust and on-going mutual respect both companies have for one another and once again confirms Zuellig Pharma’s position as Asia’s leading healthcare services provider,” said John Davison, Zuellig Pharma CEO. “We are totally committed to making continued improvements in quality, technology & overall in-market capabilities, providing innovative & comprehensive services to support GSK’s growth in the years to come.” he added.

Cambodia warehouse receives GSDP certification

Zuellig Pharma Cambodia received GSDP certification for its warehouse on October 27, 2015, following an intensive audit from BSI Group, an independent third party services provider. Such certification is Zuellig Pharma’s regional quality assurance gold standard for storage and distribution. It is a key milestone in Zuellig Pharma Cambodia’s drive for commercial and introducing operational excellence, and international standards in the Cambodian market place.

The six-month project was led by Ms. Monica Pech, Quality Assurance and Regulatory Manager, Ms. Simean Chay, Operations Manager, and Mr. Bastien Cochez, Quality Project Manager. Implemented warehouse upgrades included tripling of pallet places, and reviewing and developing standard operating procedures. The additional capacity and strong quality management system provide a firm foundation for expansion in the fast-growing Cambodian market.
Taiwan celebrity draws attention to diabetic management

On the eve of World Diabetes Care Day, YesChain, Zuellig Pharma’s community pharmacy chain in Taiwan, invited Taiwan celebrity Mr. Yong Lea to be “store manager for a day” at its flagship Nan Men Pharmacy. The event was one of the key customer programs to launch the Life+ Diabetes Management Mobile App and pharmacist one-on-one diabetes care services. The singer and actor is popular among older customers and was able to draw attention to the importance of treatment adherence and consistent health monitoring among those suffering from chronic illnesses, such as diabetes.

Mr. Yong assisted more than 50 customers with a body mass index (BMI) measurement and provided tips on how diabetes sufferers can manage daily activities. Customers downloaded the Life+ Diabetes Management Mobile app to explore the convenient online service offering.

The one-day store manager event was widely covered on television and by online media. YesChain donated 1% of the store sales revenue on that day to the Yilan Association of Diabetes Supporters, the co-organizer of the event.

Zuellig Pharma Vietnam advances cold chain packaging

Zuellig Pharma Vietnam has enhanced its pharmaceutical delivery service, becoming the first company in Vietnam to introduce a reusable cold chain packaging system for temperature-sensitive shipments.

eZCooler (also known as BioThermal Credo® and produced by Pelican in the US) ensures the integrity of temperature-sensitive products during transport while minimizing the impact on the environment. It is designed to comply with stricter manufacturing and health authority guidelines, and increase customer satisfaction and patient safety. Following a pilot run, Zuellig Pharma Vietnam plans to officially launch eZCooler in Hanoi and Ho Chi Minh City in mid-January 2016.

The initiative is part of Zuellig Pharma Vietnam’s commitment to continuously improve its services to clients, and to make high-quality, safe medicines available to Vietnamese patients.

eZCooler will be progressively rolled out across the Zuellig Pharma network, with a focus on markets with long and hazardous supply chains where last-mile distribution is particularly important.
Korea staff support “Pink Ribbon” and other community activities

Zuellig Pharma Korea staff once again participated in the Pink Ribbon breast cancer awareness campaign in October, taking part in the “Pink Ribbon Love Marathon”. Employees have been involved in the annual campaign since 2012. The company also distributed 100,000 copies of breast cancer self-examination cards for customers visiting pharmacies.

Staff members at Zuellig Pharma Korea branch offices contribute to various other corporate social responsibility programs, including helping at an orphanage, visiting an elderly people’s home, and working as volunteers at community events. Such activities are part of the company’s vision of “Bringing Health to the Community”.

Hong Kong and Macau employees show their community spirit

Zuellig Pharma Hong Kong and Lei Va staff members have taken part in a variety of corporate social responsibility activities in the second half of 2015.

In July, Hong Kong employees organized the Hong Chi Charity Bazaar. The event featured handmade products and was held on behalf of Hong Chi Association, a non-profit organization to assist people with intellectual disabilities in developing their potential to the full.

In October, Zuellig Pharma Hong Kong sponsored the Hong Kong Climbathon on behalf of Hong Chi. In the fun challenge, mixed four-member teams had to run up to the 29th floor of the Central Plaza building in Wan Chai, a total of 644 steps. Each person was expected to run six to eight floors.

Also in October, staff held the annual Zuellig Pharma “Pink Day” in support of the Hong Kong Cancer Fund. On October 23, more than 120 employees in Hong Kong and Macau wore pink to show their support for Breast Cancer Awareness Month, an annual global campaign.
in the news | COMPANY DEVELOPMENTS

Stepping up for fund-raising challenge in Singapore

September saw Zuellig Pharma Singapore and Zuellig Pharma Specialty Solutions Group participate in "The September Challenge – 10,000 STEPS A DAY" charity event, organized by the Cerebral Palsy Alliance Singapore (CPAS). The quest involved walking 10,000 steps per day during the month, motivating employees to join an exciting health initiative to improve their fitness and at the same time raise funds for CPAS.

Zuellig Pharma Singapore has worked on other fund-raisers with CPAS over the past two years, namely a Donation Drive in 2013 and Spare Your Change Campaign in 2014. Money raised in the "Steptember" campaign will be put toward essential programs and services, including rehabilitation equipment, medical expenses and caregiver support programs, for people with cerebral palsy and multiple disabilities.

APL sales visit program provides practical insights to students

In mid-November, PT Anugerah Pharmindo Lestari (APL), Zuellig Pharma's subsidiary in Indonesia, hosted 37 undergraduate students from Prasetiya Mulya Business School on a two-day sales visit with its sales force.

The program aimed to equip students with an overall understanding of the pharmaceutical distribution process and expose them to daily sales discipline and activities. The sales visit was a credit requirement and formed part of the students' sales management course.

At the end of the visit, students presented their observations and findings to APL's sales management. The feedback indicated that they valued the practical experience and opportunity to go beyond textbook learning.

Staff participants of "The Steptember Challenge" fitness quest and fund-raiser.

Raising funds for Cerebral Palsy Alliance Singapore.

Business school students during a warehouse tour at APL.
People to watch

The new Market Partner talents who are responding to the demands of our ever-expanding businesses

Regional

Mr. Fauzi Wahab has been appointed VP, Human Resources. Fauzi brings to the company more than 20 years of human resources leadership experience, predominantly in Asia and the Middle East. His most recent role, based in Singapore, was Regional General Manager Human Resources, Asia, Middle East & Africa for Fonterra, a multinational dairy company headquartered in New Zealand. His role covered the full range of human resources activities, from developing human resources strategy for the whole region to executing country-specific initiatives.

Ms. Sandy Ho has been promoted to Director, Commercial and Operations, Patient Solutions. In this new role, Sandy will take responsibility for all operational and commercial aspects of the Patient Solutions business across the region. In her previous position of Regional Commercial Manager, Patient Solutions, Sandy has been a driving force in shaping the Patient Solutions business over the past three years. With her strong commercial and operational background, she is well placed to help to shape the next phase of integrated offerings while ensuring that operational capability is aligned with business growth and development. She reports to Ms. Clare Dally, Regional Head, Patient Solutions.

Ms. Koh Ji Ting has joined Zuellig Pharma as Regional Compliance Manager. Ji Ting previously worked at American Express in Singapore, where she covered various countries in Asia-Pacific, and at Marina Bay Sands. Before moving into compliance, Ji Ting was an auditor with KPMG. Ji Ting graduated from Nanyang Technological University in Singapore with honors. Her qualifications include Chartered Accountant, Certified Anti-Money Laundering Specialist (ACAMS) and Anti-Bribery Specialist (TRACE). Ji Ting reports to Mr. Timothy Hui, General Counsel.

OTC-specific services showcased in Thailand

Zuellig Pharma Thailand organized a well-received OTC event in August 2015 to promote the company’s comprehensive services, introduce the latest eZRx technology, and provide drugstore owners with up-to-date information about 13-digit taxation regulations and tax planning. The event comprised a conference and Q&A session in the morning and a Distribution Center site visit in the afternoon.

Tender analysis boosts competitive edge

In September 2015, Zuellig Pharma Vietnam launched Tender Insights, a new online analysis tool, showing tender prices and quota development trends over the years, based on publicly available tender-winning data.

Tender Insights is available through the company’s Tender Web, a portal that provides market intelligence and automates the tender submission workflow.

The analysis tool includes:
- Tender price and quota analysis by therapeutic class
- Tender price and quota analysis by molecule
- Tender price and quota analysis by specific hospital
- Tender detail results

Through Tender Insights, Zuellig Pharma clients can effectively forecast quota and price developments, helping to provide a competitive advantage.

eZRx makes online ordering easy in Vietnam

In August 2015, Zuellig Pharma Vietnam rolled out eZRx, its new internet-based, multi-functional B2B ordering platform, in cooperation with local partner Sang Pharma. eZRx is available to all retail customers in Vietnam, enabling them to place orders online. Over a three-month period following the launch, 2,500 customers nationwide made frequent use of the platform. One key benefit is eZRx’s intuitive interface, making it easy for customers with less online experience to use. Additional functionality includes product information, real-time price, stock availability, promotion programs and order history. The platform was originally developed by Zuellig Pharma Korea.
new role, she will work on logistics data analysis, inventory control, warehouse operations management and process improvement. She reports to Mr. Chapman Lam, Director of Operations.

Malaysia

Zuellig Pharma Malaysia has appointed Mr. Melvin Ho as Associate Director, Medical Device Department. Melvin has more than 14 years’ experience in supply chain management, ranging from sourcing, procurement, warehousing, logistics and production planning. He has worked for British American Tobacco and Schlumberger, and his most recent role was Service Operations Manager for the Asia Region at Sidel Distribution Malaysia Sdn Bhd. Melvin will head the Medical Device Department and oversee the operations of Customer Care Centers. He reports to Mr. Graham Simpson, Operations Director.

Ms. Lim Sok Keng has been promoted to Senior Manager, Warehouse. Sok Keng will be responsible for goods receiving, put away, picking, transportation, returns and inventory management. She was previously Principal and Customer Service Manager. She reports to Mr. Graham Simpson, Operations Director.

Ms. Ooi Yen Yen has become Sales Manager, Ethical Channel, Commercialization. She has 14 years’ experience in the pharmaceutical field. Prior to this post, she was Sales Manager at MSD. She has also worked at Sun Pharmaceuticals and Pfizer, handling product development. She reports to Mr. Teh June Keat, Head of Sales & Marketing, Ethical Channel, Commercialization.

Hong Kong

Zuellig Pharma Hong Kong is pleased to announce that Mr. Andi Umbricht has been appointed Chief Executive. Andi will work closely with the senior management team to ensure successful delivery of the annual business plan, strategic projects and outstanding services to clients and customers. He will oversee all business functions of Zuellig Pharma Hong Kong and Lei Va in Macau. Andi brings 20 years of healthcare distribution, supply chain and commercial management experience to this role. For the past three years he has been Chief Operating Officer at Zuellig Pharma Hong Kong. Prior to that, he held the position of Director, Pharma, National Pharmaceutical Distribution at Cardinal Health China, based in Shanghai. Andi’s experience spans multiple locations – Vietnam, Taiwan and China – and multiple positions for Zuellig Pharma, including Senior Director – Commercial Operations, Vice President – Sales & Marketing, National Collection Manager, and Operations Manager. He reports to Mr. Tom Vanmolkot, SVP North Asia/Medical Devices & Diagnostics.

Ms. Josephine Ng has been appointed Business Development Manager at PharmaLink in Hong Kong. Josephine’s previous experience encompasses pharmaceutical sales and marketing, brand management and business development for various multinational companies such as MSD and Johnson & Johnson. She will be responsible for the implementation and progress of strategic business goals. Josephine will also oversee the development of key projects and the successful closure of business deals. She reports to Mr. Daymond Lee, Director, PharmaLink.

Ms. Peggy Zie has become Operations Support Manager at Zuellig Pharma Hong Kong. Peggy has extensive experience in supply chain planning, process control and operations management with various multinational corporations. In her new role, she will work on logistics data analysis, inventory control, warehouse operations management and process improvement. She reports to Mr. Chapman Lam, Director of Operations.

Ms. Emmery Cheong has joined the company as National Sales Manager, Consumer Healthcare, Commercialization. Emmery has worked in the sales area for global companies for more than 12 years, with her experience ranging from pharmaceuticals to fast-moving consumer goods. She has previously worked for Auric Pacific, F&N Dairies, Pfizer, C.K. Tang Limited and Wyeth. She reports to the Head of Commercialization.

Ms. Connie Wong has joined the company as Quality Manager, Quality Department. Connie has close to 10 years in the quality arena, including working with Unilever, Tesco, and GlaxoSmithKline. Connie’s main focus has been operational quality systems in a manufacturing environment while her most recent role provided exposure to quality audit management, ensuring compliance to set standards. She reports to Ms. Foo Ai Lin, Quality Director.

Ms. Naniwati Md Jani has also been appointed Quality Manager, Quality Department. She has more than 15 years’ experience in quality management, with previous posts at Pharmaniaga Manufacturing and LifeScience as well as Inno Biologics, all in a manufacturing environment overseeing and managing quality matters. Her most recent role was Quality Assurance Manager at Upha Pharmaceutical Manufacturing. She reports to Ms. Foo Ai Lin, Quality Director.

Correction
Ms. Norulazami Abu Bakar (Ms. Norulazami) was appointed Principal Services Senior Manager not Principal Services Manager as reported in Issue 67 of The Market Partner.
Taiwan

Ms. Susan Chang has become Operations Manager at Zuellig Pharma Taiwan. Prior to joining Zuellig Pharma, Susan was a Betferon Patient Care Services Specialist at Bayer Taiwan. Susan brings 13 years of nursing and patient education experience to help the development and implementation of Patient Solutions services. She reports to Ms. Lily Lan, Head of Patient Solutions.

Zuellig Pharma Taiwan is pleased to announce that Mr. William Chiu has been appointed Quality Assurance Director. Prior to joining the company, William was Vice Director of United Biomedical, Inc. William has 10 years of pharmaceutical regulatory and quality compliance experience. At Zuellig Pharma, he will help the development and implementation of quality management. He reports to Mr. Brett Marshall, Regional Quality Assurance Director.

Thailand

Zuellig Pharma Thailand is pleased to announce the appointment of Mr. Louis-Georges Lassonnery as Chief Executive, Zuellig Pharma Thailand, from January 1, 2016. Louis-Georges joins the company from Novartis, where he was most recently Strategic Project Manager of the Asia Middle East Africa Region at the company’s Swiss headquarters. Prior to that, he was Chief Operating Officer of the Pharma Division in Algeria in 2014 and General Manager of the Group in Vietnam from 2010-2013. Before Louis-Georges joined Novartis, he spent 11 years with Servier, working in Korea and the Netherlands, among other countries.

Louis-Georges started his career in France in mergers and acquisitions at BDO International, an audit firm. He then worked for French chemical group SNPE as a Corporate Finance Global Officer, participating in projects in Japan, Thailand, UK and the US. Louis-Georges has a Doctor of Pharmacy degree from Université Claude Bernard Lyon 1 in France.

He also has an MBA from École de Management de Lyon (now EMLYON Business School). He reports to Mr. Yves Hermes, Vice President Thailand & Indochina.

Khun Satit Pantakitpaiboon has been appointed Credit Control and Database Manager at Zuellig Pharma Thailand, with responsibility for customer credit and overseeing the accuracy of the customer and product databases. He has a solid background in the pharmaceutical business and previously worked at Zuellig Pharma as Business Unit Director before joining MSD and Roche Diagnostics. He reports to Khun Pucknalin Bulakul, Chief Operating Officer.

Khun Wiponrat Adjimatera has joined the company as Product Manager attached to the Commercialization Division. She has 10 years’ experience in both ethical and OTC channels at pharmaceutical and healthcare companies such as Alcon Laboratories, Novo Nordisk, MSD, Silom Medical, and Berli Jucker. She reports to Khun Chanchai Thamromdee, Vice President Commercialization etc.

Khun Thonlaya Paetangsee has been appointed Principal Services Manager. She comes on board with almost 10 years’ experience in customer support and services from DHL Express, DuPont, and Sidel. She reports to the Vice President Logistics and Principal Services.

Khun Niltnai Prakobpanich has rejoined the company as Facility and Security Manager, with responsibilities covering facility management, security management, health, safety and environment management, total temperature validation, and governmental liaison in the area. He has more than 10 years’ experience in facility engineering and maintenance from Adisa Group, Jones Lang LaSalle, and Zuellig Pharma (2011-2014). He reports to the Vice President Logistics and Principal Services.

Khun Umaporn Kanitset has been appointed Compensation and Benefit Manager. Khun Umaporn has worked in human resources for 17 years, taking up roles with Marks and Spencer, Minor Food, Bluewave E-Trade, and the Petroleum Authority of Thailand Exploration and Production Services. She reports to Khun Natdanai Manothai, Vice President Human Resources.

Khun Worawach Satianpanit has been appointed Brand Manager attached to Sales and Marketing, Multiline 1 Department. He comes on board with over 10 years’ experience in pharmaceuticals from MSD. He reports to Khun Picht Promlikithchak, Business Unit Director BU 1.

Khun Montira Palakawong Na Ayutthaya has joined the Medical Devices and Diagnostics Division as Business Manager, responsible for orthopedic clients Zimmer and Stryker. She has previously worked in order management, marketing and sales operation planning, and supply chain management for companies such as Unilever and Smith & Nephew. She reports to Khun Jinda Charoenpiboonsin, Vice President Medical Devices.

Khun Khwanruede Anunbunpakij has been appointed Logistic Manager – Outbound (Animal Health). She is responsible for storage, replenishment, picking, packing, invoicing, and labeling of animal health products as well as clinical trial management. She has 15 years’ experience in customer services, logistics and warehouse management at global companies, including Slumberland and DHL Supply Chain. She reports to the Vice President Logistics and Principal Services.

Khun Theeta Phakkaphuttichapan has joined Zuellig Pharma as Principal Services Manager. She has worked in Thailand and overseas in accounting, general affairs, and business support for KPMG, Charoen Pokphand Foods, Asahi Holding, DKSH, and others. She reports to the Vice President Logistics and Principal Services.

Khun Thidarat Wangthatawakorn has been appointed Customer Service Support Manager, responsible for ensuring that customers’ orders are effectively and accurately processed in a timely manner. She has 10 years’ experience in documentation, logistics coordination, customer handling and management at Damco. She reports to Khun Salsaya Kanchanaphatthanakul, Customer Services Manager.
Reinforcing coaching capabilities

The right tools and training are essential for first line managers to effectively develop their sales force

By PharmaLink Academy

In a commercial business, where one of the company's primary resources is its field force, it is important to ensure that the people with the right talent and potential are in place and are equipped to grow with the organization. When representatives form the majority of the field force, the role of the first line manager in developing people is critical. Hence, Zuellig Pharma Commercialization strives to ensure that its first line managers are well trained and tools are in place to help them to perform this role.

Training programs for first line managers (and the rest of the field force) are developed in-house as far as is feasible to ensure maximum relevance to the business and correct implementation on the job. One key Zuellig Pharma initiative is the 6 Leadership Elements Program, a series of training courses that equips first line managers with the appropriate approach, methods and tools to deal with day-to-day staff development in a pharmaceutical sales environment. One of the most important and widely used elements of leadership is coaching. Sometimes coaching may be confused with other areas, in particular training. The difference is training builds knowledge and a foundation for skills while coaching presupposes that skills have already been taught and learned, and aims to develop such know-how to a required level.

A coach must therefore ensure that the sales representative has already received the appropriate training as there is no point providing coaching for a skill that the sales representative does not possess.

The main challenge for an organization is to enable first line managers to coach effectively and efficiently. They need to have complete understanding of why, when, where, what and how to coach. Enough coaching time must be spent in the field and afforded to sales representatives. In addition, relevant and high-quality coaching exercises must be conducted and efficient tools employed. Zuellig Pharma Commercialization’s 6 Leadership Elements Coaching Toolkit, includes a useful summary of a coach’s role.

There is emphasis on the fact that coaching is not a one-time, one-shot activity. Several coaching sessions and follow-throughs are needed, coupled with regular performance tracking and monitoring, to ascertain improvement and the elimination of gaps.

To ensure follow-throughs, the Zuellig Pharma Commercialization team set up an Automated In-field Coaching Facility through e-PORTE, its electronic territory management system, in 2015. The tool is accessible via device app and web, making it much easier for first line managers to coach with confidence.

The automated tool offers all the functionality of its paper-based counterpart, has been developed to suit business requirements, and is specifically tailored to hone sales representatives’ selling skills via 4Ps Selling, Zuellig Pharma Commercialization’s proprietary selling process. It provides summaries of coaching agreements and skills ratings, and an archive of coaching sessions. Coaching discussions are sealed, with an acknowledgement by the representative that the coaching report submitted by the first line manager has been discussed and agreed upon.

Coaching by all 90-plus first line managers and second line managers across the region is also tracked each month.

To continually develop first line manager coaching capabilities, Zuellig Pharma Commercialization recently launched the 6 Leadership Elements Coaching Calibration Program. This equips first line managers with a Behaviorally Anchored Rating Scale (BARS) to guide them in coaching selling skills. The aim is to provide maximum objectivity in evaluating sales representatives’ selling performance, and to clarify the first line manager’s coaching input and scoring of a sales representative’s selling skills.

These BARs provide a guide to questions that can be asked to identify skill gaps during coaching. They can also serve as a memory aid for sales representatives during self-coaching sessions. All initiatives, training and tools are continually reviewed, challenged, improved and implemented for the sales force and Zuellig Pharma Commercialization to ensure commercial excellence across the region.
OTC year in review

Key developments in Asia-Pacific’s consumer healthcare market in 2015 point the way to the year ahead

By Nicola Allan, Editor, OTC INSIGHT Asia-Pacific • nicola.allan@nicholashall.com

Top 10 OTC trends in detail

Rx-to-OTC switch

After the ground-breaking approval for non-Rx availability of sildenafil erectile dysfunction treatment Silvasta (Douglas Pharmaceuticals) in New Zealand in 2014, this year was disappointing in terms of switch. The reclassification of oral contraceptives in Australia and New Zealand has (so far) been denied and there was little to report in Japan, usually an active switch market. One exception in Japan was the reclassification of topical loxoprofen plasters (50mg and 100mg) and gel (1%) for pain relief from Rx to instruction-required drug (pharmacist-only OTC, online sales banned). Topical OTCs containing this ingredient are yet to launch. Taiwan approved several switches in the categories of allergy remedies, antacids and antifungals, and others.

Mergers and acquisitions

Following the megadeals of 2014 (for example, Bayer’s purchase of Merck Consumer Care and GlaxoSmithKline’s consumer health joint venture with Novartis), 2015 was much quieter for mergers and acquisitions. One of the biggest deals to affect Asia-Pacific was Chinese infant care specialist Biostime’s acquisition of an 83% stake in Australian vitamins, minerals and supplements marketer Swisse Wellness for A$1.39 billion (US$1 billion) in September 2015. This deal bodes well for both parties as Australian vitamins, minerals and supplements brands are booming in China.

Chinese shoppers

Consumers in China were keen to buy OTC and vitamins, minerals and supplements made in other Asia-Pacific markets, owing to frequent safety scares regarding locally produced brands. Australian brands benefited from this trend, with Blackmores – launched in China in 2012 – reporting that Chinese tourist and entrepreneurs...
in Australia had been buying the brand to send home to relatives and sell via online retailers. The company is also expanding its direct presence in China through an expanded partnership with JD.com. Swisse reported a similar trend and is set to benefit further following its acquisition by Biosteel.

Meanwhile, Japanese drugstores made the most of the consumption tax exemption for tourists, introduced in October 2014, by tailoring their stores and OTC product selections to suit Chinese consumers.

E-pharmacy
The most notable online pharmacy developments took place in China and India. In China, e-commerce players and drugstore chains took forward online pharmacy businesses and other services enabling consumers to access healthcare products quickly and remotely. Such developments were primarily to make the most of impending legalization of Rx medicine sales, but OTC products will benefit from the technological upgrades too. In India, e-pharmacy services were launched but unclear regulations and strong opposition from chemist stores provided challenges for online retailers.

Sexual and intimate health
Non-Rx availability of Silvasta proved successful and the brand won three marketing awards at the New Zealand Self-Medication Industry’s Annual Conference in October 2015. The reclassification of oral contraceptives in New Zealand has yet to be approved but the Medicines Classification Committee is reconsidering its decision regarding whether or not to allow non-Rx availability. In South Korea, the end of a government-funded review on emergency hormonal contraceptives is expected to re-ignite discussion on whether these products should be switched from Rx to OTC. Feminine intimate care opened up. Sanofi is trialing Lactacyd in Japan. Launches and advertising and promotion also raised awareness of intimate care products in Australia. The Stork conception aid was launched in Australia by local distributor Biccari Holdings for Rinovum Women’s Health in August 2015.

Incentives for VMS launches
One of the most active categories of new product development continued to be vitamins, minerals and supplements, owing partly to easier registration in some countries compared to medicated brands. Japanese marketers, such as FancI, have rolled out supplements in the “food with nutrient function claims” category since April 2015 when new regulations were introduced. The regulations allowed food supplements to be supported by nutrient claims as long as scientific evidence of the claim had been provided to the Consumer Affairs Agency. Regulations also eased in South Korea, where functional food has been available for consumers to purchase via vending machines since March 2015.

Meanwhile, Indonesian marketers made the most of demand for jamu (herbal) medicines by investing in evidence-based research for their products. Natural products are being launched regionally beyond the vitamins, minerals and supplements category (for example, in cough, cold and allergies) as alternatives to allopathic ingredients that are subject to misuse concerns, such as dextromethorphan and pseudoephedrine. Australian vitamins, minerals and supplements brands are also expanding overseas. Swisse, already popular in China, was launched in Singapore and the UK. Blackmores formed a joint venture with Kalbe to introduce the brand in Indonesia in 2016.

Regulatory harmonization
Efforts to establish a joint therapeutic products regulator, the Australia New Zealand Therapeutic Products Agency (ANZTPA), were scrapped in November 2014 following a review of progress and assessment of the costs and benefits of proceeding. At the time, it was stated that each country would proceed with its own regulatory reform program. Since then, the New Zealand government has begun working on a new regulatory regime to regulate therapeutic products, which will replace

Full integration of the ASEAN Economic Community is slated for end-2015 but may not be realized due to challenges in cross-border business and member countries struggling to meet regulatory requirements in time. The aim of the ASEAN Economic Community is to promote free movement of labor, trade and capital. In terms of OTCs, it could result in easier launch pathways for marketers wishing to take their products into different countries.

PPI developments in Australia
OTC proton pump inhibitors (PPIs) have been available in Australia since 2008 when pantoprazole switched and Nycomed (now Takeda) launched Somac Heartburn Relief. Switches of rabeprazole, lansoprazole, omeprazole and esomeprazole followed but OTC PPIs continue to rank behind traditional antacids. This is mainly due to their Schedule 3 (pharmacist-only) status, which – until recently – prohibited consumer advertising and promotion.

This is set to change as S3 esomeprazole was permitted to be advertised to consumers effective October 2015 (and S3 PPIs lansoprazole, omeprazole, rabeprazole and pantoprazole look likely to follow suit). In addition, a S2 entry (pharmacy-only, advertisable) was created for pantoprazole (up to seven days supply) and a recommendation issued to create a S2 entry for esomeprazole in packs of up to seven days supply, effective February 2016. The changes for esomeprazole could pave the way for the launch of Pfizer’s Nexium 24HR Once Daily Dosing, which was added to the Australian Register of Therapeutic Goods (ARTG) in December 2014.

Pricing
The price of OTC medicines was a hot topic in several countries in 2015. In China, government-enforced price caps for most medicines were removed in June 2015. In the past, price caps made some brands economically unviable to manufacture, leading to shortages. The new policy aims to address this by allowing healthcare companies to play a more important role in price-setting.

Meanwhile, the Indian government is reviewing Drug Price Control Order 2013 – which brought all 348 essential medicines under price control in May 2013 – to improve efficiency and rectify implementation issues. Marketers, including RB, have argued that price controls make profit so low or non-existent for some brands that there is no incentive for companies to invest in marketing and raise awareness of their health benefits.

In Australia, it was announced that 17 OTC formulations – including paracetamol 500mg and 665mg tablets and aspirin 100mg tablets – would be removed from the Pharmaceutical Benefits Scheme in January 2016. This will generate annual government savings of A$87 million (US$63.1 million), which will be invested in new medicines. The cuts will also benefit patients, who sometimes pay two to three times the retail price of common medicines when buying them through a prescription.

Economic challenges in Southeast Asia
Underdeveloped categories mean Southeast Asian markets have the potential for high OTC growth. However, recent economic challenges have taken their toll on consumers’ spending habits. As such, OTC growth is being held back. A rise of 30% for fuel in Indonesia hit the pockets of local residents while some marketers were forced to implement price increases to cover the cost of higher transport costs.

In Thailand, political instability and depressed economic conditions led to flat GDP and increased household debt, which in turn translated into lower consumption of healthcare products, according to industry experts.

In China, the economy may appear to be booming, with more than US$1 billion in sales recorded in the first eight minutes of Singles Day (an online shopping event held annually on November 11). This is not the case. According to data released in November 2015, industrial output grew slower than expected in October (+5.6%), though retail sales did pick up, rising by 11%.
The private healthcare sector is stepping up to meet the challenge of the fast-growing number of non-communicable disease diagnoses

A 2013 report from World Vision International noted that from 1990-2012, non-communicable diseases consistently received the least amount of funding of all areas of worldwide health, with an allocation of only 0.8% of global development assistance for health. A 2013 report from World Vision International noted that from 1990-2012, non-communicable diseases consistently received the least amount of funding of all areas of worldwide health, with an allocation of only 0.8% of global development assistance for health. With the majority of such global development assistance directed toward prevention, treatment, and eradication of communicable diseases, findings from the United States' Centers for Disease Control and Prevention (CDC) are not a surprise. In a 2013 article, "The New Global Health", communicable diseases were noted to be on the decline, comprising an estimated 19% of deaths worldwide in 2010. Since 1990, aggregate deaths from communicable diseases (in conjunction with maternal, neonatal, and nutritional morbidity) had decreased by 14%. For the most part, it would appear that monetary assistance has proved effective in combating the spread of infectious illnesses. While targeted, disease-specific efforts, such as the fight against tuberculosis, have been largely successful, the CDC suggested that gains in only some areas of communicable disease eradication showed lingering weaknesses in implementation and integration of organized global health approaches. For example, some outreach and
prevention methods have been slow to mobilize, or coordination between various health channels at national and global levels have been ineffectual. The result has been that fatalities from certain infectious diseases, such as HIV/AIDS and malaria, have continued to increase throughout the past two and a half decades despite overall declines in the spread of communicable diseases.

Given that these are systemic issues, such failures apply equally to approaches for combating non-communicable diseases. Although a focus on reducing or eradicating communicable diseases remains necessary, the prevalence of non-communicable diseases globally also requires immediate attention.

Low to middle-income countries are especially vulnerable, with 80% of all non-communicable disease-related deaths occurring in these populations. The continued growth of non-communicable disease diagnoses over the past 25 years correlates with increases in urbanization, air pollution, physical inactivity, excessive alcohol and tobacco use, and unhealthy diets made up of processed foods, trans fats, and other additives. Some of these trends indicate positive outcomes, such as increased GDP, easier access to nutrition, and longer life spans. Other contributing factors reveal a more sinister scenario.

The rise in non-communicable diseases shows a widespread lack of access to on-going healthcare, poor understanding of personal chronic disease management, shortages of medical professionals and specialists with the knowledge to treat complex chronic illnesses, and the absence of effective universal healthcare. Long-term treatment for diseases, such as cancer, can also be expensive, creating yet another barrier. Writing for the online World Economic Forum Agenda section, Dr. Harald Nusser, Global Head Novartis Access, pointed out: “Chronic illnesses… push millions of people below the poverty line every year as their health problems affect their ability to work and add new costs to already tight household budgets.”

In Asian countries in particular, where there is a significantly large population of aging individuals combined with inconsistent access to medical services and treatment, especially for rural and socioeconomically disadvantaged demographics, the burden of chronic illness is even more marked. In China, for example, non-communicable diseases comprise more than 80% of the country’s diagnoses.

In fact, 60% of the world’s diabetes sufferers can be found in Asia, as well as half of those suffering from cancer worldwide, with the latter demographic expected to grow beyond 10.5 million cases by 2030. In addition to an aging population, contributions such as the rampant spread of Hepatitis B in many Asian countries helps to explain why a majority of liver cancer occurrences, the second leading cause of cancer death globally, are found in this part of the world.

Much like infectious-disease initiatives that have targeted the reduction of specific communicable diseases over past decades, health services for cancer and other non-communicable diseases in Asian countries and elsewhere in the world require a purposeful management strategy that incorporates prevention, early detection, and consistent, affordable access to care. However, despite the prevalence of non-communicable diseases, most Asian nations, including China, do not give this new pandemic much priority in terms of disease control. Management mostly comes at regional and local governmental levels, leaving private healthcare providers and NGOs to fill the remaining gaps, especially regarding the availability of quality primary care.

A Canadian Medical Association Journal article, “Poverty and Chronic Diseases in Asia: Challenges and Opportunities”, noted while “a substantial number of adult deaths still result from tuberculosis and AIDS” both in Asia and globally, “the Disease Control Priorities Project reviewed over 300 health interventions and found proven, feasible, affordable, and cost-effective interventions that can reduce the risk of premature death from chronic diseases in middle age.” Managing non-communicable diseases early has positive side effects such as a reduction in poverty, particularly among at-risk populations.

Communicable and non-communicable disease management both deserve attention to ensure health outcomes around the world continue to improve. To develop more effective and efficient approaches, the CDC has suggested that similar to other aspects of global health, combating chronic illnesses is multidisciplinary, encompasses many elements besides development, and requires coordination of multiple parties, rather than direction by one organization or discipline.

**Private sector support and Zuellig Pharma’s Patient Solutions**

In a 2015 report, “The Shifting Landscape of Healthcare in Asia-Pacific”, the Economist Intelligence Unit designated the lack of access to patient-centered healthcare systems as the major challenge facing non-communicable disease management today. Most healthcare systems were developed for, and are still best-suited to, acute care,” the report explained, before noting that none of the healthcare systems it studied across five Asia-Pacific countries met the ideal standards for this type of system. Elements of such a system include: accessibility to better-managed, less sporadic care; a meaningful focus on cost-effective prevention of non-communicable diseases; a level of patient support that educates and empowers individuals to effectively manage their conditions; and system integration that allows for genuinely customized, flexible care.

In the absence of such broad support at the national level, private healthcare providers have been given room to step up and create more immediate solutions to combat the effects of the rising number of cases involving non-communicable diseases. In an effort to fill this gap, Zuellig Pharma has
established Asia’s leading broad-spectrum patient support service through its Patient Solutions program.

One of the most critical tools for tackling the burden of non-communicable diseases is the development and implementation of patient-centered healthcare solutions based on the Chronic Care Model. The CDC has described the model as using “a systematic approach to restructuring medical care to create partnerships between health systems and communities”24. Based on six key elements that focus on informed and supportive on-going care, the model is “internationally accepted as the main strategic response to the challenges of chronic disease”, according to a *Canadian Family Physician* article by Dr. Carmel Martin, Associate Professor of Family Medicine at the Northern Ontario School of Medicine.25

To successfully achieve improved health outcomes and non-communicable disease reduction, disease prevention and management programs should not only focus on education and adherence to treatment, as indicated by the Chronic Care Model, but also elevate the care approach to consider a patient’s entire disease journey. This requires consideration of an individual’s behavior and attitudes, the cultural value placed on chronic care, and external contributing factors. A truly integrative approach requires partnerships between many players, including healthcare providers, pharmaceutical companies, governments, medical aid NGOs, and other key stakeholders, working in collaboration toward sustainable lifestyle improvement and engaged health management.

To that end, Patient Solutions focuses on disease prevention and patient education relating to non-communicable diseases across multiple therapeutic areas including cardiology, diabetes and respiratory conditions. Zuellig Pharma works hand in hand with both local and multinational pharmaceutical companies to jointly create customized disease-management plans, raise awareness of behavioral changes that may limit or delay disease onset, provide accurate counseling and coaching, and address the accessibility and affordability of treatments for chronic illnesses. Localizing its services, Zuellig Pharma carefully considers local economies, legal and regulatory frameworks, universal healthcare benefits, and other factors impacting patient care in order to deliver an effective, end-to-end, patient-centric care experience.

However, the most significant factor affecting chronic disease outcomes is adherence to management and treatment programs. World Health Organization data (most recently from 2003) has shown medical adherence for non-communicable diseases at around 50% in developed countries.26 A more recent meta-study from the *Journal of Medical Internet Research*, conducted in 2015, indicated that the use of mobile health tools could increase patient adherence by up to 56%.27 These findings suggested that a multifaceted approach combining education, access, communication, coaching, and empowerment was the most effective means of treating chronic disease over a patient’s lifetime.

With this in mind, the Patient Solutions team has collectively managed over 60 evidence-based, patient-centered programs across 13 Asia-Pacific countries and regions, as well as working with more than 20 top pharmaceutical companies and over 30 brands while building a best-in-class healthcare expert panel across Asia. Zuellig Pharma’s innovative and inclusive approaches increase adherence, lower overall health expenditures, and optimize health outcomes for individuals diagnosed with or at risk of developing non-communicable diseases.
Case study I: Affordability

**Problem:** A critical roadblock to patients' adherence to chronic disease management is the affordability of prescription medication. A high upfront expense for a course of treatment or the cost over time of a medication included as part of an indefinite, on-going management plan are both significant hindrances to compliance. This issue can often be further compounded by psycho-social and emotional challenges, low health literacy, and an inadequate understanding of the consequences resulting from non-adherence.

**Solution:** (1) Zuellig Pharma created a Patient Support Program in Selangor, Penang, and Perak, Malaysia. The initial pilot involved 11 hospitals, 49 cardiologists, and approximately 300 patients over a six-month period. The program was extended by 15 months due to its success. It provides discounted medications or redemption offers to qualified patients following guided enrollment, while a contact center offers streamlined support services to help patients navigate each step of the program. (2) Zuellig developed a Patient Payment Program (PPP) in Singapore and partnered with two of the three largest banks in the city state to introduce six and 12-month interest-free installment payment plans, providing more affordable payment options for treatment.

**Outcome:** As a result of both programs, patients exhibit better rates of follow-up, persistence, and compliance as overall adherence to chronic disease management plans increases. By coordinating with banks, Zuellig Pharma ensures principal providers are not required to pay fees or charges related to administration, installation, or default payments, encouraging widespread participation due to relatively low risk. Furthermore, participating pharmaceutical companies' image is positively impacted by aligning with these patient-centric and forward-thinking programs, creating stronger and longer-lasting relationships between companies and patients.
Case study II: Access to healthcare and mass vaccination

**Problem:** Preventative healthcare and vaccinations are underutilized in many Asian countries, primarily due to (1) low awareness levels and a lack of knowledge about the efficacy of these interventions, compounded by the absence of informational campaigns, conflicting cultural/religious beliefs, and misinformation/fear, or (2) inaccessibility or unaffordability of the necessary health services, particularly for underserved communities and rural populations.

**Solution:** The Zuellig Pharma Mass Vaccination Program broadens reach and improves vaccine access for institutions, communities and patients. The end-to-end program includes an integrated digital platform, website registration and ordering, delivery of products to the site, administration of vaccines, data and insight reports to evaluate effectiveness, and options for continuing patient management programs.

**Outcome:** To date, the Mass Vaccination Program has administered over 550,000 doses at over 1,500 vaccination events in collaboration with more than 350 companies and institutions across Asia. The program is an effective means to: inform the public about the importance of preventative healthcare; encourage immunization awareness and access; bring healthcare services to a greater number of consumers at a lower cost; assure consumers of product quality and integrity; encourage patient compliance and adherence; and provide a platform for additional healthcare initiatives. The result is increased access to healthcare and mass vaccination efforts as part of an effective disease prevention and management process.

Case study III: Healthcare communications

**Problem:** Consumer healthcare education, information regarding disease prevention and awareness, and multichannel communicable and non-communicable disease management campaigns are not being effectively communicated to patients and the wider healthcare industry. The results are negative health outcomes, higher healthcare costs, and increasingly overburdened medical systems.

**Solution:** Zuellig Pharma's Healthcare Communication and Education Service offers (1) marketing communications to hospitals and clinics covering medical education (including content development, training programs, creation of academic newsletters) and events (symposiums, workshops, exhibitions), (2) patient education and disease support, and (3) public disease awareness campaigns and public health screenings/check-ups.

**Outcome:** Disease prevention information is communicated more efficiently to patients and the healthcare industry, resulting in increased awareness and, eventually, in better healthcare outcomes, lower healthcare costs and a more efficient healthcare delivery.

Case study IV: Comprehensive programs

**Problem:** A lack of patient education and support and inconsistent end-to-end services result in low adherence rates and sub-optimal health outcomes, affecting both acute and chronic disease management and treatment.

**Solution:** Zuellig Pharma Patient Solutions improved patient adherence and overall healthcare by providing a large pharmaceutical company with “end to end” services to support their patient program and deliver targeted education and support via holistic and high-touch integrated care. The program includes a feasibility study; enrollment of doctors and patients; promotion, detailing and collection of enrolment forms in participating pharmacies through the Zuellig Pharma trade marketing team; nurse-led proactive disease management support; and provision of a contact center team to collect patient details and provide follow-up services.

**Outcome:** Since the inception of this comprehensive program in six countries, covering multiple therapeutic areas, over 50,100 patients have received services. This has had a significant impact on patient adherence rates, exemplified by a 300% increase in adherence in the Philippines. In addition, there was a marked effect on patients’ health and satisfaction: 70% started or increased their exercise routine, 80% made positive changes to their diet, and 100% completed recommended testing at the prescribed intervals. Some 95% would continue taking the medication due to the program and over 95% were very satisfied with the provided support.

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Global medicine use in 2020

Volume is set to increase substantially, along with greater access and more technology-enabled healthcare, by 2020

By IMS Institute for Healthcare Informatics

The volume of medicines used globally will reach 4.5 trillion doses by 2020 and cost US$1.4 trillion, both representing significant increases from 2015. The largest pharmaceutical-using countries will be the pharmerging markets (including China, India, Indonesia and Brazil among others), with two-thirds of the global medicine volumes, mostly comprised of generic medicines and dramatic increases in the utilization of medicines due to broad-based health system expansions. Developed markets will continue to account for the majority of medicine spending, due to both higher prices per unit and the mix of newer medicines that bring meaningful clinical benefit to patients facing a wide range of diseases.

**Medicine use**

In 2020, more of the world's population will have access to medicine than ever before, albeit with substantial disparities. Patients will receive 4.5 trillion doses, up 24% from 2015, with most of the increase from countries closing the gap in per capita usage of medicines between developed and pharmerging countries. Over 50% of the world's population will consume more than one dose per person per day of medicines, up from one-third of the world in 2005, driven by India, China, Brazil and Indonesia.

Developed markets will continue to use more original brand and specialty medicines per capita while pharmerging markets will use more non-original brands, generics and over the counter medicines. The use of new medicines – first available in the prior 10 years – will represent 0.1% of volumes in pharmerging markets, compared to 2%-3% in developed markets.

**Medicine spending**

Global spending on medicines will reach US$1.4 trillion by 2020, an increase of 29%-32% from 2015 compared to an increase of 35% in the prior five years. Spending will be concentrated in developed markets, with more than half for original brands and focused on non-
communicable diseases. Specialty therapies will continue to be more significant in developed markets than in pharmerging markets and different traditional medicines will be used in developed markets compared to pharmerging markets. Spending growth will be driven by brands in developed markets and increased usage in pharmerging markets, while being offset by patent expiries. Brand spending in developed markets will increase by US$298 billion in the five years to 2020, driven by new products and price increases primarily in the US, but will be offset by an estimated US$90 billion in net price reductions.

Small molecule patent expiries will have a larger impact in 2016-20 than in the prior five years, and there will be an increased impact from biologics. In 2020, the US, EUS, and Japan will have important differences in spending and growth dynamics from today. Pharmerging markets’ spending will grow primarily from increased use of medicines while China, the leading pharmerging country, will reach US$160-US$190 billion in spending with slowing growth to 2020.

Transformations in disease treatment
The overwhelming inertia in medicine use – where 97% of medicines used have been available for more than 10 years – masks the contribution from transformative disease treatments, orphan drugs for rare diseases and technology-enabled changes in care that can harness big data to better inform decisions, help drive patient behavior changes and improve outcomes. The seemingly intractable problems of neglected tropical diseases, compounded by poverty and war in Africa, appear to finally be responding to philanthropy-funded research and engagement resulting in fundamental changes by 2020.

The use of medicines in 2020 will include 943 New Active Substances introduced in the prior 25 years, and new medicines in recent years will be weighted to specialty and biologics. Patients will have greater access to breakthrough therapies and clusters of innovation around hepatitis C, a range of cancers, autoimmune diseases, heart disease, and an array of other rare diseases. The ubiquity of smartphones, tablets, apps and related wearable devices combined with electronic medical records and exponentially increasing real-world data volumes will open new avenues to connect healthcare information while offering providers and payers new mechanisms to control costs.

Patients will have many more treatment options, especially in cancer and rare diseases, and will be informed, motivated and engaged partners in treatment choices. Their financial stake will also rise as private and public payers in developed economies have already begun to increase patients’ levels of co-payment. In low and middle-income countries direct out-of-pocket cash payments will shift to premiums for private or supplementary insurance as countries strive for universal health coverage.

The outlook to 2020 includes higher levels of medicine spending and therefore higher revenues for manufacturers than in the past five years. The extent and nature of the issues faced by healthcare stakeholders and the sources of the spending growth projected belie a more complex challenge to the sustainability of the pharmaceutical industry. Critical adaptations will be necessary for the pharmaceutical industry to thrive into the next decade, and key among them will be listening and providing valuable solutions to the problems their customers face.

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A round-up of reports from our offices around the region outlining the news and events that are shaping their businesses and redefining the healthcare industry.
The government announced an increase in the eligibility threshold for supplementary insurance premiums. Under the current system, people with rental income, interest income, stock dividend income or professional fees exceeding NT$5,000 (US$153) per month must pay a 2% premium on the additional revenue. According to the Ministry of Health and Welfare, the threshold will be raised to NT$20,000 (US$612). The move, due to start in 2016, is expected to benefit 3.42 million people. It will also cut the National Health Insurance Administration’s income by NT$4.2 billion per year, leading to a deficit by 2017. The government plan is therefore seen by many as aimed at pleasing the public ahead of January’s presidential election.

In the World Health Organization’s four-level categorization of cancer-causing agents, estrogen is listed under the highest level, where human exposure to the compound may lead to increased risk of breast cancer or endometrial cancer. As such, the Taiwan Food and Drug Administration has decided to ban certain components of estrogen in cosmetics and personal care products, starting from mid-2016. Estrogen is currently on Taiwan’s list of controlled substances, which requires manufacturers and importers to possess a permit for use. The new policy follows recent bans on estrogen in cosmetics by governments worldwide. The EU, United States, Canada and Mainland China have already introduced restrictions due to concerns that the substance may cause cancer and contribute to pollution.

Based on advanced estimates from the Ministry of Trade and Industry, the Singapore economy registered 1.4% GDP growth in Q3 2015 on a year-on-year basis, avoiding a technical recession. The manufacturing sector, weighed down by weak global demand, was the largest drag on growth. Gloomy sentiment prevails among businesses as the challenging global economy, coupled with high operating costs locally, heightens the risks that economic conditions may worsen. According to the Singapore Business Federation, most businesses have seen volumes drop, and many have put hiring on hold.

Such challenges and slower economic performance formed the backdrop for September’s general election. All the parliamentary seats were contested, with opposition parties calling for more diverse voices and opinions in parliament. However, the population voted otherwise. The dominant People’s Action Party (PAP) won 83 out of 89 seats in a landslide victory, securing close to a 70% share of votes. The election results were seen as a vote of confidence in the current government as well as an endorsement of the latest policies and reforms.

On the social front, the Singapore population crossed the 5.5 million mark for the first time in June. The number of persons has grown due to a small rise in the birth rate and an increase in the non-resident pool. While the new entrants do bring some relief to the aging population situation, the graying challenge still remains an issue for Singapore. It has been reported that seniors aged 65 and older now constitute 13.1% of the civilian population, with those aged 85 years and older growing fast in numbers. As there are now 4.9 citizens in the working age band to every senior aged 65 and above, the government has introduced reforms to MediShield, the national insurance scheme, and Community Health Assist, which allows for subsidized general practitioner treatment. It has also launched the new Pioneer Generation Package. Concurrently, some private insurers are becoming more responsive to the growing domestic silver market, introducing plans that allow the elderly to claim payouts for home care and hospice care services.

With the burden of chronic diseases expected to climb, the government is already taking steps to mine its pool of patients’ data. The aim is to better match patient’s needs to services, as well as identify early interventions and behavioral changes that can help patients prevent, delay, or control chronic diseases.

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Fast Fact
Singapore’s population hits 5.5 million for the first time.

The OECD cut South Korea’s economic growth outlook from its previous estimate of 3% in June to 2.7%. It also lowered the growth forecast for 2016 from 3.6% to 3.1%. The report cited two shocks that hit the economy in 2015: an outbreak of Middle East Respiratory Syndrome (MERS); and a marked slowdown in demand from China and other Asian countries. While the MERS outbreak has been resolved, weaker demand from Asia remains a dampener on growth. The Korean won rose more than 20% in trade-weighted terms in the three years to April 2015, another negative factor for Korea’s exports.

Despite this, the OECD forecasts that the Korean economy will grow 3.6% in 2017. The figures for 2016 and 2017 are expected as a result of increasing consumption in the private sector and free trade agreements with major economies, including China and Australia. While wages have risen, high household debt will continue to constrain private consumption, which has lagged output growth since 2006.

The serialization of drug supplies will become mandatory on January 1. However, real-time reporting will be postponed six months for pharmaceutical companies and 18 months for wholesalers. The Ministry of Health and Welfare plans to extend the program to the remaining 15 districts in phases.

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Fast Fact
The Hong Kong Competition Ordinance came into full effect on December 14, 2015.

Taiwan
Economic expectations lowered

The Taiwan Institute of Economic Research cut its forecast for GDP growth for 2015 to 0.83%, from 3.11% projected in July, as private consumption failed to benefit from energy cost savings and exports dropped due to the global economic slowdown. The Institute expects Taiwan’s export-oriented economy to fare better in 2016, with a 1.84% expansion. However, the economy is forecast to remain moderate until after Q1.

The serialization of drug supplies will become mandatory on January 1. However, real-time reporting will be postponed six months for pharmaceutical companies and 18 months for wholesalers. The Ministry of Health and Welfare
has reviewed and announced the respective Pharmaceutical Affairs Act amendment. The Ministry has also been conducting an investigation into pharmaceutical distribution margins to understand the situation and prepare corrective measures. The Ministry began the study in June after one lawmaker pointed out that a 15.7% distribution margin was higher than in other countries.

Setting a medicine payment due date has been legalized. The 2nd Subcommittee of the National Assembly Legislation and Judiciary Committee passed the Pharmaceutical Affairs Act amendment after revising it partially on October 29. Prior to this, major hospitals had often taken advantage of their negotiating power to delay drug payments. The Ministry of Health and Welfare (MOHW) can now require payments for medicines are made within six months.

A Contract Sales Organization (CSO)-like company has been launched, funded by both multinationals and domestic distributors. FocusMed Korea is an integrated sales company providing services such as pharmaceutical sales and marketing. Geo-Young, the largest pharmaceutical wholesaler in Korea, owns 20% of the company. The former head of CSO business at inVentiv Health Korea has been appointed FocusMed’s Chief Executive Officer.

In addition, the largest domestic CSO is set to emerge in the pharmaceutical distribution industry. Several pharmaceutical and distribution companies have jointly raised more than 10 billion won (US$8.6 million) to establish a CSO. The news attracted interest as this will be the first time that pharmaceutical companies have been involved in establishing a CSO. The organization will be wholly responsible for the products of participating pharmaceutical companies.

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**Fast Fact**

Changes in the contract sales organization landscape involve both multinationals and domestic companies.

The falling price of Malaysian oil exports, political uncertainty, and a general currency crisis in the region, stemming from volatile global financial conditions, has dampened growth prospects. Domestic demand, a driver of growth in recent quarters, is likely to moderate in the second half of 2015 as effects from earlier tax hikes and financial instability drag down private consumption. The Business Confidence Index (BCI) and Consumer Sentiments Index (CSI) have fallen sharply in Q3 2015 to 86.4 and 70.2 respectively. The unemployment rate climbed to 3.2% in August while inflation eased to 2.6% in September, slowing from 3.1% the previous month.

In an effort to restore investor confidence and halt currency deterioration, the government announced it would inject US$4.6 billion into the Malaysian stock market via state-owned investment funds. Expectations over the inflow of this money into the stock market over October helped stabilize the currency and precipitated bullish sentiments in forex markets.

Budget 2016 focused on striking a balance between the capital economy and people economy. The fiscal deficit is expected at 2%-3%. The Budget saw an increase in the national minimum wage by around 10%-15% and a higher tax rate for those with annual income of RM600,000 (US$143,000) and above, the top income tax band. The Health Ministry received an allocation of RM23.03 billion (US$5.5 billion), which was RM270 million (US$64.4 million) less than 2015. A total of RM4.6 billion (US$1.1 billion) has been allocated for the supply of medicines, consumables, vaccines and reagents to all government hospitals and clinics. The majority of the health budget allocation was allocated to the building of new hospitals and 1Malaysia clinics, and upgrading existing hospitals, rural clinics, health clinics and dental clinics. A sum of RM72 million (US$17.2 million) has been allocated to medical assistance provision, including hemodialysis, which is expected to benefit nearly 10,000 poor patients.

To improve Goods and Services Tax treatment, all types of controlled medicines under Poisons List Groups A, B, C and D and 95 over-the-counter medicines for treating 30 types of illnesses, including cancer, diabetes, hypertension and heart disease, will be zero rated. Zero-rated items were extended from 4,215 types of drugs to 8,630, effective January 1, 2016. It is expected that the cost of medication in private hospitals and clinics in Malaysia will decline with this exemption.

Brunei’s economy expanded 1.5% year on year in Q2 2015. This was due to growth in both the oil & gas sector and non-oil & gas sector, at 0.8% and 2.5% respectively. Oil & gas sector growth was spurred by a 0.2% increase in oil & gas mining and 3% in manufacturing of liquefied natural gas and methanol. Among non-oil & gas areas, the agricultural, forestry and fishery sector grew 7.7% while the industrial sector increased 1.7%, a rebound from the 7.2% drop in Q1 2015.

In October, the Ministry of Health held a series of events in conjunction with Breast Cancer Awareness month. These included motivational briefings conducted by the Brunei Cancer Center, counseling on breast care, and a breast screening examination to raise awareness of breast cancer prevention among women, early detection and treatment.

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**Fast Fact**

Malaysia’s list of zero-rated GST drugs has been extended to more than 8,600 types, effective January 1, 2016.

The Thai military government will remain in power until at least 2017 as the promised elections have been postponed. This follows the junta’s decision to rewrite the first draft of its constitution before presenting it to the public for approval. The move will give the generals more time to consolidate their power and accelerate efforts to oust the Shinawatra family and their allies from the Thai political scene.

However, while the junta implements its preferred way of political reform, the weak economy threatens to undermine its legitimacy and is pushing the military regime to implement quick fixes, such as the introduction of two rounds of stimulus and an acceleration of fiscal spending. Prime Minister Prayuth Chan-ocha also recently replaced his economic team with one headed by Mr. Somkid Jatusripitak, who was involved in building former Prime Minister Thaksin Shinawatra’s populist economic...
The GDP growth forecast has been revised to 2.4% for 2015 and 3.5% for 2016 as there are little signs of recovery outside public spending. Thailand’s consumer confidence index slid to 72.1 in September, from an 81.1 peak in October 2014, as households remain heavily indebted.

On the healthcare front, implementation of the government-driven maximum procurement price (also known as median price) is progressing slowly. This is due to the need to improve the overall process and procedures to achieve a fair, consistent and transparent mechanism that will ultimately benefit Thai patients.

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**Fast Fact**
The government’s maximum procurement price initiative is only making slow progress.

Philippines
Economy strengthens in Q2

The economy improved in Q2 2015, with GDP growth of 5.6% compared with (a revised) 5% in Q1 2015. Such growth was due to an increase in private construction, which grew 10.4% in Q1 2015, with infrastructure spending in catch-up mode in Q2 2015. Service sector performance, including education, healthcare, hotels, restaurants and business services, also improved.

In politics, President Benigno Aquino approved the proposed P3.002 trillion (US$66.6 billion) National Budget for 2016. The Budget is 15% higher than in 2015 and accounts for nearly one-fifth of the country’s GDP. About 37%, or P1.1 trillion (US$23.4 billion), will be allotted to “social services”, covering education, healthcare, housing and social welfare. Some P830 billion (US$17.6 billion) has been set aside for the “economic services” category.

The total pharmaceutical market, as estimated by IMS, was valued at P144 billion (US$3.1 billion). As of Q2 2015, MAT grew 6% from +3.2% in Q1 2015. The ethical market, valued at P106 billion (US$2.3 billion), accounted for 73% and grew by +7% while the proprietary market posted +3.4% growth. All therapeutic classes registered positive growth, except for calcium antagonists. Local companies’ growth doubled at 10% in Q2 2015 compared with 5% MAT Q1 2015. Multinationals grew to 3% MAT Q2 2015 against 2% in the previous quarter.

The six largest chain accounts (Mercury, Rose, Watsons, South Star, St. Joseph and Negros Grace) continued to expand, with a combined store opening of 122 branches.

Local conglomerates are also increasingly investing in healthcare. Ayala Corporation has recently bought stakes in Generika, a fast-growing drugstore chain. In addition, Ayala launched the first online doctor service, MDKonsulta, through a joint venture between its telecommunications company and an international healthcare company. This service provides 24x7 doctor consultations online for a minimal fee. Metro Pacific Investment Corp., a hospital chain group, recently added Manila Doctors Hospital, a 300-bed hospital, bringing its total to 10 hospitals.

Zuellig Pharma Philippines
The Value Services and Innovation Group continued to provide wider market access for clients’ products to customers and patients. Expansion of the Drugstore Merchandising Program is on-going, covering major chain drugstores nationwide and driving greater products enrolment. Patient Solutions saw the launch of new partnerships with skincare and dermatology companies to provide support services for patients, enrolled by physicians, to help them manage their condition better. The Mass Vaccination Program continued to bring more affordable physician-led vaccinations to corporate institutions and communities.
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**Fast Fact**
More local conglomerates are moving into healthcare, including drugstore investment and online services.

The Asian Development Bank (ADB) lowered its forecast for Indonesia’s GDP growth in 2015, despite maintaining its outlook for developing Asia, citing problems with budget disbursement and export delays. The forecast was cut from 4.9% to 4.8% for 2015 and from 5.4% to 5.3% in 2016. The government has issued six economic packages in an effort to bolster the economy amid the slowdown, focusing on simplified business-permit processing, incentives for investors, and loan support for labor-intensive industries.

In Jakarta, only 40% of the city’s 2015 budget of nearly US$50 billion had been spent, as of November, raising concerns about the progress of much-needed infrastructure projects in the gridlocked capital of 10 million people. Jakarta officials expect as little as half of the budget will be spent this year, with the rest being carried into 2016. Indonesian bureaucrats are holding off spending billions of dollars on everything from schools and clinics to garbage trucks and parking meters, fearful that any major expenditure could come under the scanner of fervent anti-corruption fighters. The paralysis is so bad that President Joko Widodo, desperate to pull Southeast Asia’s largest economy out of a slump, is considering a decree that would shield civil servants from graft busters until big-ticket projects are completed.

Indonesia created the world’s largest national health insurance system in 2014. In its second year, it has been struggling. A deficit has mounted up quickly as more patients sign up to pay nominal premiums ranging from US$1.70-US$4.10 per month for broad medical coverage. It covers everything from check-ups and maternity services to treatments for cancer patients at both public and private hospitals. The program attracted new enrollees with serious and often long unaddressed medical problems that require expensive surgery or long-term treatments. The looming question is whether Indonesia can afford to offer treatments at the low premiums the system currently charges. The program cost 3.3 trillion rupiah (US$224 million) more than it took in as premiums and from a government fund that covers the premiums for more than 97 million poor Indonesians. The Health Ministry projected that this year’s shortfall might deepen to 13.5 trillion rupiah (US$951 million).

To address such financial troubles, Indonesia is undertaking a costly overhaul of the program’s infrastructure but is currently not
views from the region

looking at raising healthcare premiums. Now more than 150 million people are enrolled in the program, BPJS Kesehatan, the government entity running the program, will keep promoting it and ease the bureaucracy to attract those who are used to a simpler process under private, self-paid insurance. After January 1, 2019, enrollment in the system will become mandatory.

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* Fast Fact
The world’s largest national insurance scheme is struggling to contain a growing deficit.

Vietnam
Trade agreements set to enhance exports and FDI

For the first nine months of 2015, GDP grew 6.5% compared with the same period in 2014. The consumer price index rose just 0.74%, indicating the Vietnamese dong was stabilizing. Low inflation spurred domestic demand, with imports reaching US$124.5 billion (+15.9%). Exports also put in a strong performance, reaching US$120.7 billion (+9.6%). Given the strength of the economy, in September, the National Salary Council submitted a proposal to raise the minimum wage in 2016 by 12.4%.

The positive Vietnamese economy was further supported by the conclusion of the negotiations for a Free Trade Agreement with the EU in early December, and the 12-party Trans-Pacific Partnership negotiations, led by the United States, in early October. Both agreements are expected to accelerate exports to the EU, US, Japan, Australia, and Canada, as well as foreign direct investment in Vietnam.

The EU Free Trade Agreement and Trans-Pacific Partnership negotiations have a direct impact on the pharmaceutical landscape as they will bring further liberalization of the sector. Market access will be enhanced through such measures as: agreement on removal of the clinical trial requirement for innovator drugs; the right for foreign-invested enterprises to import pharmaceuticals (while preserving trading rights for Vietnamese enterprises); direct access to tenders for 34 hospitals in Vietnam; and reduction of tariffs.

November 16 kicked off Antibiotic Awareness Week in Hanoi. According to newspaper Tuoi Tre, antibiotics account for 17% of healthcare expenditure in Vietnam, an alarming figure given that medicines as a whole contribute 48%. The country has one of the highest antibiotic-resistant profiles listed by the World Health Organization, with resistance rates reported up to 50%-60% for carbapenems and third-generation cephalosporins. It is commonplace to purchase antibiotics without prescription, driven by pharmacist recommendation. It is expected that the government will start focusing on this challenge in the near future.

A shortage in vaccines for infants has been causing growing concern, with an increasing number of people traveling to Singapore and neighboring countries for vaccinations.

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* Fast Fact
The country’s high antibiotic-resistant profile is likely to become a focus for the government.

The World Bank’s real GDP growth forecasts for 2015 were revised downward, from 7.1% to 6.9%, in October, as exports and tourism faced increased competition from low-wage competitors, such as Myanmar. The situation was further aggravated by the appreciation of the US dollar, as Cambodia’s economy is heavily dollarized. However, domestic demand remained robust, sustained by a 33% year-on-year expansion of credit to the private sector. The construction and services sectors, notably finance and real estate, continued to drive growth while inflation remained modest, at 1% year on year, as transportation and fuel prices declined.

Cambodia’s infrastructure is set to benefit from accelerated economic support from China and Japan over the coming years. Recent headwinds faced by the Chinese economy actually seem to have had a positive impact on investment in Cambodia, as Beijing sees external demand as a revenue opportunity for its infrastructure-related state-owned enterprises.

Japan is also looking to tap into growing overseas markets, leading to increased investment in Cambodia. A considerable volume of Japanese investment in Cambodia has flowed from labor-intensive industries into electronics and machine parts, allowing Cambodia’s industry to keep climbing up the value chain. The Japanese government has also considerably increased its support to Cambodia in 2015, approving low interest loans totaling US$375 million for infrastructure improvements.

This promising economic outlook is nevertheless tempered by recent political developments. The fragile dialogue initiated between the ruling CPP and main opposition party, CNRP, is now giving way to politics as usual, with Prime Minister Hun Sen taking an increasingly authoritarian stance ahead of the 2018 elections. The political truce broke down when CNRP members were jailed on charges of insurrection.

International observers are also concerned by the unexpected retirement of CNRP President Kong Korm from the Senate, and by the fact this decision happened a week after his son, an opposition lawmaker, was brutally beaten during protests outside the National Assembly. His retirement message, in which he implored the country’s youth to read about the past, illustrated current political concerns.

The pharmaceutical sector is expected to remain dynamic, with growth of 10.3% during 2016. In the absence of a state-funded healthcare system, 77% of health-related expenses are still paid by patients. This is a growing concern as the quality of services, and therefore treatment costs, keeps increasing.

The World Health Organization’s recent “Tracking Universal Health Coverage” report states that 6% of the population could be tipped or pushed further into extreme poverty due to out-of-pocket health costs. One solution would be the consolidation of existing initiatives. This would be a step-by-step process as health financing is currently fragmented between community-based insurance, the Health Equity Fund for those living below the poverty line, and other social programs. A new National Health Financing Policy is currently undergoing inter-ministerial review, according to the World Health Organization report.

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* Fast Fact
The private sector represents 89% of services provided to patients in Cambodia at present.
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