

CBI MARKET SURVEY

THE PHARMACEUTICAL PRODUCTS MARKET IN THE
NETHERLANDS

Publication date: February, 2010

Report summary

This CBI market survey discusses the following highlights for the pharmaceutical products market in The Netherlands:

- The Netherlands was the seventh largest pharmaceutical market in the EU in 2007, accounting for approximately 3.3% of the EU pharmaceutical market. Between 2003 and 2007, The Netherlands' consumption of pharmaceutical products increased by an annual average rate of 7.3%, amounting to € 4.6 billion in 2007.
- In 2007, The Netherlands was the sixth largest market for generic medicines in the EU, amounting to € 886 million, which accounted for 3.2% of the total EU market. Generic medicines in The Netherlands accounted for 19% of the total pharmaceutical market.
- In 2006, The Netherlands was the eighth largest producer of pharmaceutical products in the EU, accounting for approximately 3.5% of total EU production. The Netherlands' production decreased by a slight annual average rate of 0.3% between 2003 and 2007, amounting to € 5.7 billion in 2007.
- In 2008, The Netherlands was the sixth largest importer of pharmaceutical products in the EU, accounting for approximately 5.9% of total EU imports. Between 2004 and 2008, Dutch imports increased by an annual average rate of 3.3% in value, but decreased by 6.6% annually in volume, amounting to € 6.5 billion or 61 thousand tonnes in 2008.
- Imports from developing countries accounted for only 0.4% of total Dutch imports of pharmaceutical products in 2008. The most significant developing country supplier in 2008 was India. In spite of accounting for a very small share, imports from developing countries into The Netherlands increased by an annual average rate of 29% between 2004 and 2008.

This survey provides exporters of pharmaceutical products with sector-specific market information related to gaining access to The Netherlands. By focusing on a specific country, this survey provides additional information, complementary to the more general information and data provided in the CBI market survey 'The pharmaceutical products market in the EU', which covers the EU market in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used, as well as information on other available documents for this sector. It can be downloaded from <http://www.cbi.eu/marketinfo>

1 Market description: consumption and production

Data concerning consumption and production of pharmaceutical products in The Netherlands are derived from the European Federation of Pharmaceutical Industries and Associations (EFPIA). The latest report from this organisation (The Pharmaceutical Industry in Figures, 2009 Update) provides data as of 2007. Data for previous years are derived from previous editions of this report. Please note that data for both consumption and production of pharmaceutical products are given at ex-factory prices.

Consumption

The Netherlands was the seventh largest pharmaceutical market in the EU in 2007, accounting for approximately 3.3% of the EU pharmaceutical market (at ex-factory prices). Between 2003 and 2007, The Netherlands' consumption of pharmaceutical products increased by an annual average rate of 7.3%, amounting to € 4.6 billion in 2007. The development of The Netherlands' pharmaceutical consumption was in line with the total EU pharmaceutical consumption, which also increased by an annual average rate of 7.3% in the review period.

Please, note that data on consumption of specific pharmaceutical products are fragmented and cannot be presented in a structured manner. Additional information can be found under the section 'Trends in consumption'.

Generic medicines

In 2007, The Netherlands was the sixth largest market for generic medicines in the EU, amounting to € 886 million, which accounted for 3.2% of the total EU market. Between 2005 and 2007, the market for generic medicines in The Netherlands increased at a rate of 15%. Generic medicines in The Netherlands accounted for 19% of the total pharmaceutical market, which is a high portion if compared to countries like France, where generic medicines accounted for 10% of the total pharmaceutical market in 2007. Nonetheless, in Germany, for instance, the largest generic medicines market in the EU, the value share of generics was 30% in the same year.

In The Netherlands, generic substitution is financially attractive for pharmacists, and generic medicines have substantially lower prices compared to originator medicines. In addition, various (financial) incentives are provided to physicians, and this contributes to generic prescribing. The use of generic medicines is further supported by the fact that health insurance funds have agreed on generic substitution target rates in consultation with pharmacists (Simoens and De Coster, 2006). Pharmacists also have a financial incentive: one third of the difference between the price of the dispensed pharmaceutical product and the price of the highest (originator) equal pharmaceutical product can be charged to the patient or their insurance company (European Commission, 2007). Patients, however, do not receive many incentives to buy generic medicines.

Market segmentation

The Dutch pharmaceutical market can be segmented in two distinct – but interlinked – manners: the dispensing method and the channels through which pharmaceutical products are dispensed to patients.

Regarding the **dispensing method**, the market for pharmaceuticals in The Netherlands consisted for 88% of prescription products, whereas 12% was non-prescription products in 2008. The **channels** through which pharmaceutical products are dispensed to patients are divided into three main categories: general access pharmacies, hospital pharmacies and other retail channels, as indicated below:

- *General access pharmacies:* these pharmacies consist of a retail storefront, which has a dispensary where pharmaceutical products are stored and dispensed. The dispensary is subject to the pharmaceutical legislation, which has specific requirements for storage conditions, handling equipment, warnings, etc.
- *Hospital pharmacies:* they usually handle more complex pharmaceutical products, with specific indications which require stricter safety regulations and patient compliance. Most of the products in these pharmacies are single-dose or unit dose. Hospital pharmacies are usually located in the premises of hospitals, with trained personnel, quality assurance and adequate facilities. In some countries, hospital pharmacies are only used for inpatient treatment and the products channelled through hospital pharmacies in these countries are not available for outpatients. In The Netherlands, hospitals are allowed to dispense pharmaceutical products to both inpatients and outpatients.
- *Other retail channels:* this segment consists of supermarkets, convenience outlets and mass merchandisers, which sell non-prescription pharmaceutical products. For this reason, regulations are less strict than in pharmaceutical outlets which sell prescription products. In comparison to other EU countries, this segment plays a very prominent role in the Dutch pharmaceutical market. In addition, there are Internet drugstores and pharmacies in The Netherlands offering to supply non-prescription medicines by mail order. However, the involvement of a pharmacist is obligatory (Association of European Self-Medication Industry - AESGP, 2009).

According to EFPIA (2008), the shares of each segment of pharmaceutical sales in The Netherlands amounted to approximately:

- Pharmacies (general access): 73%
- Hospital pharmacies: 18%
- Other retail channels: 9%

Trends in consumption

- **Ageing population:** Due to the ageing population in The Netherlands, strong growth in the consumption of pharmaceutical products used by older consumers is reported in the country. According to Euromonitor, 2007 saw an increasing consumption of analgesics for the treatment of arthritic and rheumatic diseases. Products for the treatment of digestive disorders have also shown strong growth (Euromonitor, 2008).
- **Health insurance act:** As of 2006, the Dutch government introduced a mandatory health insurance scheme. The new health insurance act has substantially increased price competition amongst insurers and healthcare providers, making the Dutch health care system one of the most market-oriented in Europe (Espicom, 2009).
- **New medicine law:** In 2007, a new medicine law was introduced in The Netherlands. Under this law, three new categories of pharmaceutical products were introduced: pharmacy-only, pharmacy and drugstore only and general sale.
- **Non-prescription pharmaceuticals market** is expected to develop positively in the coming years, as Dutch consumers are in general committed to improving their health and well being. Additionally, self-medication is expected to increase, as government policies promote health and consumer education, while manufacturers also invest in new product development and advertising (Euromonitor, 2009).

For more information on pharmaceutical products trends, please refer to the CBI survey 'The pharmaceutical products market in the EU'.

Production

In 2007, The Netherlands was the eighth largest producer of pharmaceutical products in the EU, accounting for approximately 3.5% of total EU production. The largest EU producer in 2007 was France, accounting for a 21% share of total EU production. The Dutch production decreased by a slight annual average rate of 0.3% between 2003 and 2007, amounting to € 5.7 billion in 2007. The development in The Netherlands' production of pharmaceutical products was less positive than the development of total EU production, which increased at an annual average rate of 2.3% during the review period.

Please note that data concerning the production of specific product groups in The Netherlands are not available.

In addition to its production, The Netherlands' pharmaceutical industry Research and Development in 2007 was estimated at € 505 million, accounting for approximately 2.2% of total EU pharmaceutical industry R&D. The UK, which had the leading pharmaceutical industry R&D, accounted for a share of 29% of total EU R&D.

The Netherlands has a well-respected contract research and development environment. However, only a few multinationals have manufacturing plants in the country (Espicom, 2009).

Leading pharmaceutical companies in The Netherlands:

- Chefaro – <http://www.chefaro.nl> – part of the Belgian Omega Pharming
- DSM – <http://www.dsm.com>
- Vemedia – <http://www.vemedia.nl>
- Roche – <http://www.roche.nl> - Swiss company with a branch in The Netherlands
- Viatris – <http://www.meda.se> – German pharmaceutical company, purchased by the Swedish company Meda
- Boehringer Ingelheim – <http://www.boehringer-ingelheim.co.uk> – British pharmaceutical company

Trends in production

- **Research and development:** The Dutch government introduced Life Sciences & Health (LSH) a combined initiative for and by all parties active in health-related life sciences in The Netherlands. The main objective of this innovation programme is to capitalize on expertise by stimulating this important sector of the Dutch economy to grow. Besides LSH, other initiatives supporting innovative research are present in The Netherlands, for instance the "Top Instituut Pharma" which is supported by governments, companies and universities (Nefarma, 2008)
- **Consolidation:** As The Netherlands' pharmaceutical industry is mostly foreign-owned, or pharmaceutical products are supplied from other EU countries, the consolidation taking place in the European conventional pharmaceutical industry is of direct influence on the Dutch pharmaceutical industry.

For more information on pharmaceutical products trends, please refer to the CBI survey 'The pharmaceutical products market in the EU'.

Opportunities and threats

- + The Netherlands is one of the largest markets for pharmaceutical products in the EU, and its pharmaceutical consumption is increasing at stable rates. Moreover, its ageing population contributes to sales of specific product groups, among which oncologics, cardiovascular remedies and analgesics can be highlighted.
- + The presence of generic medicines in the Dutch market is very strong, and this group of pharmaceutical products continues to expand, which provides good prospects for exporters of pharmaceutical products in developing countries.
- The Dutch pharmaceutical industry reflects the strong presence of consolidated international pharmaceutical companies, which restricts the entry of new suppliers and represents a threat to exporters in developing countries.

Exporters should take into account that the same trend can be an opportunity for one exporter and a threat to another. Please, review these opportunities and threats according to your own situation. Chapter 7 of the CBI market survey 'The pharmaceutical products market in the EU' presents an example of an analysis of whether a trend/development is an opportunity or a threat.

Useful sources

- Ministerie van Volksgezondheid, Welzijn en Sport/ Ministry of Health, Welfare and Sport – <http://www.minvws.nl>
- The Business Monitor publication 'The Netherlands Republic Pharmaceuticals & Healthcare Report 2009'- <http://www.businessmonitor.com/pharma/netherlands.html> - provides forecasts on the Dutch pharmaceutical and healthcare industry.
- Espicom - <http://www.espicom.com> – the pharmaceutical and medical device knowledge centre.
- European Federation of Pharmaceutical Industries and Associations (EFPIA) - <http://www.efpia.org>
- Furthermore, Dutch trade associations mentioned in Chapter 6 of this survey can be useful sources of information.

2 Trade channels for market entry

Trade channels

The trade structure for pharmaceutical products across the EU is mostly similar, but reveals slight variations according to the diverse pharmaceutical and healthcare systems existent in each country. These variations hardly affect an exporter's market approach, since they are related to the way pharmaceutical products are domestically dispensed to the end-consumer. Some of the specific characteristics of the Dutch pharmaceutical trade channels and trends therein are outlined below:

- **Dutch wholesalers** work according to a multi-channel system (covering prescription products, non-prescription products, cosmetics and other products) and it was estimated that, in 2007, the country contained approximately 15 warehouses to serve the pharmaceutical distribution system (The European Association of Pharmaceutical Full-Line Wholesalers, 2007). According to AESGP, there were three nation-wide wholesalers for pharmacies and five for drugstores in 2009.
- Dutch **druggist-retailers** are part of a very concentrated structure. The three main chains (Kruidvat, DA and Etos) control 90% of the market. The share of own-label products is increasing at fast rates (especially for products such as paracetamol-based analgesics). Furthermore, druggists show increasing interest in pharmacy. In the past, there used to be approximately 20 pharmacy/ druggist combinations. However, Etos and DA discontinued their experiment with drugstores acting as pharmacy outlets for prescription pharmaceutical products (AESGP, 2009).
- As already mentioned under market segmentation, **distance-selling** of pharmaceutical products in The Netherlands is allowed by law. The country contains a few Internet drugstores and pharmacies which supply non-prescription pharmaceutical products. The involvement of a pharmacist or druggist is required in this process. Companies selling via the Internet are not obliged to operate from a general access drugstore or pharmacy (AESGP, 2009).
- The Netherlands is one of the pioneers in the field of **parallel trade** in the EU. Nowadays, parallel traded products account for approximately 11% of the total retail sales in the country (Reuters, 2008).

Please, refer to the CBI survey 'The pharmaceutical products market in the EU' for further information on EU pharmaceutical trade channels.

Players of interest to exporters in developing countries are:

- OPG - <https://www.opggroothandel.nl> - pharmaceutical wholesaler
- Interpharm (subsidiary of Alliance Unichem) - <http://www.alliance-healthcare-nederland.nl> - pharmaceutical wholesaler
- Brocacef (subsidiary of Phoenix) - <http://www.brocacef.nl> - pharmaceutical wholesaler
- Mosadex - <http://www.mosadex.nl> - pharmaceutical wholesaler
- Regifarm - <http://www.regifarm.nl> - pharmaceutical wholesaler

Price structure

Pricing and reimbursement of pharmaceutical products in the EU are issues of national competence. Therefore, the EU consists of 27 different pricing and reimbursement systems.

In The Netherlands, manufacturers are free to set their own pharmaceutical products' prices within the limits of a maximum price scheme. This scheme is adapted twice a year, by calculating the average price of comparable pharmaceutical products (in terms of active substance, strength and dosage form) in four reference countries: Germany, France, Belgium and the United Kingdom.

Prices of pharmaceutical products which are destined to be consumed only in hospitals (not to be dispensed to out-patients), are not subject to restrictions. Prices are negotiated between the hospital and pharmaceutical companies.

Generic medicines

The pricing of generic medicines in The Netherlands is subject to the same structure as originator pharmaceutical products. Nonetheless, it is important to note that health insurance funds, pharmacists, generic medicines companies, and the government agreed to reduce prices of generic medicines by an average of 40% (including claw-back) in 2004 (Simoens and De Coster, 2006).

Different prices apply throughout the various trade channels. The margins applied to pharmaceutical products in The Netherlands can be expressed in the following manner:

- Wholesaler: 18%
- Pharmacist: 33%
- State (Value Added Tax - VAT): a discounted VAT of 6.0% is applicable to pharmaceutical products (the standard VAT rate is 19%)

For further information on price structure of pharmaceutical products in The Netherlands please refer to AESGP's *Economic and Legal Framework for Non-Prescription Medicines*, which can be purchased at: <http://www.aesgp.be/publications/countryProfiles.asp>.

Selecting a suitable trading partner

Finding a trade partner in The Netherlands does not deviate from the general EU method as described in the EU export guidelines. Dutch importers look for new suppliers in developing countries by visiting the country of interest, through recommendations or through trade fairs. The most common ways for developing country exporters to approach Dutch customers are through direct (e)mail, personal visits as follow up, inviting potential Dutch customers to visit them, building a network and visiting international trade fairs.

After obtaining contacts, evaluating potential trade partners should be done according to criteria such as information quality, geographic coverage; the kind of trade relation the partner is interested in, the position of the partner and the financial status and credibility.

The following websites can be of use when finding a trading partner in The Netherlands:

- Europe Bloombiz.com - <http://europe.bloombiz.com> → Click on 'companies' in the centre of the page, and then search for 'pharmaceutical products', and select The Netherlands in the country-list.
- Europages - <http://www.europages.com> - online business directory, with full EU coverage. Search for 'pharmaceutical products' and filter by country, selecting The Netherlands on the left-sided tab 'Refine your search'.
- PharmaBuyers.com - <http://www.pharmabuyers.com> - provides contact information of 580 European importers of pharmaceutical products at a cost of US\$40 (updated in 2009).

3 Trade: imports and exports

Imports

Total imports

In 2008, The Netherlands was the sixth largest importer of pharmaceutical products in the EU, accounting for approximately 5.9% of total EU imports. Between 2004 and 2008, Dutch imports increased by an annual average rate of 3.3% in value but decreased by 6.6% in volume, amounting to € 6.5 billion or 61 thousand tonnes in 2008.

Around 57% of Dutch imports of pharmaceutical products in 2008 was supplied by EU countries, of which the main suppliers were Germany (16%), the UK (15%), Belgium (8.8%), France (6.6%) and Italy (5.0%). Imports sourced in intra-EU countries increased by an annual average rate of 5.0% in terms of value between 2004 and 2008.

Imports from extra-EU countries (excluding DCs) also represented a significant portion of total Dutch imports of pharmaceutical products in 2008. These imports accounted for approximately 42% of total imports, and increased by an annual average rate of 1.1% in terms of value between 2004 and 2008. The USA, the leading extra-EU supplier, accounted for 22% of total imports. Imports from Singapore, the second leading supplier from extra-EU countries, had an exceptional development in the review period, increasing by an annual average rate of 142%.

Imports from developing countries accounted for only 0.4% of total Dutch imports of pharmaceutical products in 2008. The most significant DC supplier was India, which accounted for 0.3% of The Netherlands' total pharmaceutical products imports. In spite of accounting for

a very small share, imports from developing countries into The Netherlands increased by an annual average rate of 29% between 2004 and 2008.

In 2008, total Dutch imports of pharmaceutical products consisted of packed pharmaceutical products (99%) and non-packed pharmaceutical products (1%).

**Table 3.1 Imports by and leading suppliers to The Netherlands
2004 - 2008, share in % of value**

Product	2004 € mln	2006 € mln	2008 € mln	Leading suppliers in 2008 Share in %	Share (%)
Total pharmaceutical products	3,061	3,199	3,715	Intra EU: Germany (16%), UK (15%), Belgium (8.8%), France (6.6%), Italy (5.0%)	57%
	2,641	3,517	2,761	Extra EU ex. DC*: USA (22%), Singapore (7.6%), Switzerland (5.1%), Israel (4.6%)	42%
	9.7	14	27	DC*: India (0.3%)	0.4%
Packed pharmaceutical products	3,036	3,156	3,653	Intra EU: Germany (16%), UK (15%), Belgium (8.9%), France (6.7%), Italy (5.1%)	57%
	2,630	3,502	2,732	Extra EU ex. DC*: USA (22%), Singapore (7.7%), Switzerland (5.2%), Israel (4.5%)	42%
	8.2	13	25	DC*: India (0.2%)	0.4%
Non-packed pharmaceutical products	25	42	62	Intra EU: Germany (21%), UK (20%), Belgium (7.1%), Ireland (4.4%), France (4.2%)	67%
	11	15	29	Extra EU ex. DC*: USA (13%), Israel (8.3%), Iceland (2.8%), Japan (2.3%)	30%
	1.5	0.9	2.1	DC*: India (2.2%), Indonesia (0.1%)	2.4%

Source: Eurostat (2009)

*Developing Countries

Imports by product group

Eurostat data were used for this section. However, as Eurostat classifies data on pharmaceutical products by non-packed products and packed products, a specific product selection cannot be made. For more information on the classification of non-packed pharmaceutical products and packed pharmaceutical products, please refer to Appendix A of the survey covering the EU.

Packed pharmaceutical products

In 2008, The Netherlands was the sixth largest importer of packed pharmaceutical products in the EU, accounting for 6.4% of total EU imports. Between 2004 and 2008, Dutch imports increased by an annual average rate of 3.1% in value but decreased by 7.5% in volume, amounting to € 6.4 billion or 58 thousand tonnes in 2008.

Since imports of packed pharmaceutical products accounted for nearly the entirety of The Netherlands' imports of pharmaceutical products in 2008, the developments for this product group were the same as the development for the overall group of pharmaceutical products.

Non-packed pharmaceutical products

In 2008, The Netherlands was the seventh largest importer of non-packed pharmaceutical products in the EU, accounting for 1.0% of total EU imports. Between 2004 and 2008, Dutch imports increased by an annual average rate of 26% in value and 39% in volume, amounting to € 93 million or 2.9 thousand tonnes in 2008.

Approximately 66% of Dutch imports of non-packed pharmaceutical was sourced in EU countries. Germany (21%), the UK (21%) and Belgium (6.7%) were the main intra-EU

suppliers. Imports from intra-EU countries increased at an annual average rate of 25% between 2004 and 2008.

The USA was The Netherlands' largest extra-EU supplier of non-packed pharmaceutical products in 2008, accounting for an import share of 14%. Extra-EU countries (excluding DCs) altogether accounted for 31% of total Dutch imports. Imports from extra-EU countries increased by a strong annual average rate of 29% between 2004 and 2008.

Developing countries accounted for a share of 2.2% of total Dutch imports of non-packed pharmaceutical products in 2008. India was by far the largest supplier, accounting for almost the entirety of supplies sourced in developing countries. Overall, imports from DCs increased by a significant annual average rate of 9.2% between 2004 and 2008.

Exports

In 2008, The Netherlands was the seventh largest exporter of pharmaceutical products in the EU, accounting for approximately 5.3% of total EU exports. Between 2004 and 2008, Dutch exports increased by an annual average rate of 4.5% in value but decreased by 7.4% in volume, amounting to € 7.0 billion or 50 thousand tonnes in 2008. The great majority of Dutch exports was destined to EU countries (70% of total exports). Germany (12%), the UK (11%) and France (9.3%) were the most significant destinations. Russia, the largest extra-EU destination, received 4.4% of Dutch exports of pharmaceutical products in 2008. In total, extra-EU countries, excluding DCs, accounted for 16% of total exports, whereas DCs accounted for a 14% share.

In 2008, total Dutch exports of pharmaceutical products consisted of packed pharmaceutical products (99%) and non-packed pharmaceutical products (1%).

Opportunities and threats

- +/- The Netherlands is one of the largest importers of pharmaceutical products in the EU and its imports experienced an increase in the review period, which indicates its potential for exporters in developing countries who aim at accessing the EU. However, in terms of volume, imports are decreasing which could be a threat to developing country exporters.
- In spite of importing substantial amounts of pharmaceutical products, The Netherlands is a net exporter. In addition, the country does not import large proportions from developing countries. In 2008, Dutch imports from DCs accounted for only 0.4% of total imports of pharmaceutical products.
- + Although imports from DCs account for a small share of total Dutch imports, they experienced a strong annual average increase of 29% in the review period, which indicates that opportunities are being created for exporters in developing countries.
- + Imports of both packed and non-packed pharmaceutical products from developing countries had a very positive development, which indicates that both product groups provide opportunities for developing country exporters.
- + The Dutch market for non-packed pharmaceutical products provides especially interesting opportunities for exporters in developing countries. In 2008, approximately 2.4% of the total imports was sourced in developing countries, which was a high share when compared to other EU countries.
- In spite of the increasing opportunities for developing countries in the Dutch market for pharmaceutical products, India is by far the leading developing country exporter. This indicates that smaller players would face strong competition from DCs which already have an established position in the Dutch and EU market.

Exporters should take into account that the same trend can be an opportunity for one exporter and a threat to another. Please, review these opportunities and threats according to your own situation. Chapter 7 of the CBI market survey 'The pharmaceutical products market in the EU' presents an example of an analysis of whether a trend/development is an opportunity or a threat.

Useful sources

- EU Expanding Exports Helpdesk
→ <http://exporthelp.europa.eu>
→ go to: trade statistics
- Eurostat – official statistical office of the EU
→ <http://epp.eurostat.ec.europa.eu>
→ go to 'themes' on the left side of the home page
→ go to 'external trade'
→ go to 'data – full view'
→ go to 'external trade - detailed data'
- Understanding Eurostat: quick guide to easy Comext
→

http://epp.eurostat.ec.europa.eu/newxtweb/assets/User_guide_Easy_Comext_20090513.pdf

4 Price developments

Pricing systems vary in the individual EU countries, thus this is also the case for price developments. The main price development observed in The Netherlands in the last few years was the following:

- Prices of pharmaceutical products have come under great pressure in the Dutch market. A price cut of 10% is forced on expired-patent branded drugs and their generic equivalent, while drugs with patents expired in 2008 have faced a 50% price cut.

Useful sources

- ITC market news service (MNS) - <http://www.intracen.org>
- PPRI – Pharmaceutical Pricing and reimbursement Information - <http://ppri.oebig.at>

5 Market access requirements

As a manufacturer in a developing country preparing to access The Netherlands, you should be aware of the market access requirements of your trading partners and the Dutch government. Requirements are demanded through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns. You need to comply with EU legislation and have to be aware of the additional non-legislative requirements that your trading partners in the EU might request.

For information on legislative and non-legislative requirements, go to 'Search CBI database' at <http://www.cbi.eu/marketinfo>, select 'Pharmaceutical products' and 'Netherlands, the' in the category search, click on the search button and click on market access requirements.

Please refer to the CBI market survey 'The pharmaceutical products market in the EU' for information on the EU-wide legislation regulating imports, production and marketing of pharmaceutical products for human use, as well as information on packaging and labelling requirements.

Additional information on packaging can be found at the website of ITC on export packaging: <http://www.intracen.org/ep/packit.htm>

Information on tariffs and quota can be found at <http://exporthelp.europa.eu>

6 Doing business

General information on doing business like approaching potential business partners, building up a relationship, drawing up an offer, handling the contract (methods of payment, and terms of delivery) can be found in CBI's export manuals 'Export Planner' and 'Your image builder'. Furthermore cultural awareness is a critical skill in securing success as an exporter.

Information on cultural differences in the EU can be found in chapter 3 of CBI's export manual

'Exporting to the EU'. These manuals can be downloaded from <http://www.cbi.eu/marketinfo> - go to search publications.

In Chapter 2, the importance of networks, trade fairs and company visits was expressed in terms of promoting your company and finding trade partners. Trade fairs also offer useful information on trends, potential competitors and the products and services they offer. Trade press should not be underestimated, both as a source of information (i.e. trends, companies) and as a means of promoting your company and your products.

Trade associations

- Association for the pharmaceutical industry of self-medication and health products in the Netherlands (Neprofarm) - <http://www.neprofarm.nl> and <http://www.zelfzorg.nl>
- Dutch Association of the research-oriented pharmaceutical industry (Nefarma) - <http://www.nefarma.nl> (website in Dutch only).
- Association of the Dutch Generic Medicines Industry (Bogin) - <http://www.bogin.nl>

Trade press

- Apotheek.nl- <http://www.apotheek.nl> - information on pharmaceutical products in The Netherlands

Trade fairs

No relevant trade fairs are held in The Netherlands. Regarding important European trade fairs, please refer to the CBI EU survey on the market for natural ingredients for pharmaceuticals.

This survey was compiled for CBI by ProFound – Advisers In Development
in collaboration with Jan Ramakers Fine Chemical Consulting Group

Disclaimer CBI market information tools: <http://www.cbi.eu/disclaimer>