

Adam Smith Conferences' 3rd International Annual

Ukrainian Pharmaceutical Forum

An evaluation of new market reforms and key growth opportunities

19th– 20th October 2010, InterContinental Hotel, Kiev, Ukraine

www.ukrainianpharma.com

Day One: Tuesday, 19th October 2010

08:00 Registration and Refreshments

09:00 Chairman's Introductory Address

09:15 Session One: Regulatory Environment: Recent Initiatives and Anticipated Changes

- Keynote Presentation: Macroeconomic Overview of Ukraine
- Establishing the main priorities for further changes in the health care regulatory system in Ukraine: what are the key objectives and main strategic questions that remain unanswered?
- What is the role of the Ministry of Health Care and Social Development in setting national health policies? Overview of the current and planned steps for the regulation of the sector
- To what extent could planned changes in the taxation system affect the level of market profitability? How feasible is it for the industry to introduce a differentiated VAT rate for medications?
- Reviewing the Antimonopoly Committee's (AMC) role in the supervision of the pharmaceutical sector – what are their key objectives and priorities?
- Overview of the key issues affecting registration and quality control – how can the system operate more efficiently to ensure that appropriate quality medicines enter the market?
- Customs clearance and certification of imported medicines in Ukraine: overview of the major problem areas (such as wrong coding etc) and the latest positive developments

Moderator: Mariana Marchuk, Associate, Baker & McKenzie

Tatiana Bakhteeva, Head of the Committee on PublicHealth, VerkhovnaRada of Ukraine

*Oleksandr Gudzenko, Deputy Minister, Ministry of Health of Ukraine**

Oleksii Soloviov, Head, the State Inspectorate for Quality Control of Medicines of the Ministry of Healthcare of Ukraine

Rafael Kuzmin, Deputy Chairman, Antimonopoly Committee of Ukraine

Antonina Yaholnyk, Partner, Baker McKenzie

Valery Kidon, President of Association, Partnership&Confidence

11:00 Coffee Break

11:30 REGULATORY DEBATE

Moderator: Inna Demchenko, Advisor to the Head of the State Inspectorate for Quality Control of Medicines of the Ministry of Healthcare of Ukraine

Oleksii Soloviov, Head, the State Inspectorate for Quality Control of Medicines of the Ministry of Healthcare of Ukraine
Oleksandr Gudzenko, Deputy Minister, Ministry of Health of Ukraine
Rafael Kuzmin, Deputy Chairman, Antimonopoly Committee of Ukraine
Mikhail Pasechnik, President, Pharmaceutical Company Falbi & President, Professional Pharmacy Association of Ukraine
Yury Zadorozhniy, Deputy Head, Department for Non-Tariff Regulation, State Customs Committee

12:20 CEO Panel Discussion “Future Scenarios for the Development of the Ukrainian

Moderator: Vladimir Ignatov, Executive Director, AIPM Ukraine

Jean-Paul Scheuer, General Manager, Sanofi-Aventis Ukraine

Anatoly Reder, Chairman of the Board, General Director, InterChem

Vladimir Telyavskiy, General Director, Kiev Vitamin Plant

Stanislav Dyachenko, Director of Representative Office Ukraine, Nizhpharm STADA

Alexandr Partyshev, Commercial Director, Arterium Corporation

Alexander Sukhodolskiy, Strategic Planning Director, BaDM

13:20 Lunch

14:30 Session Three: Creating a Competitive Strategy to Ensure Sustainable Profitability and Growth

- Overview of the corporate development strategies of the major market players – what are the factors influencing the investment decisions of local and international pharmaceutical companies working in the market?
- Will mergers and acquisitions become the main driving force behind market developments in the next couple of years? Overview of recent acquisition activity in the sector and analysis of the factors giving rise to this industry trend
- Managing business at country level – what are the specific challenges? **Case Study:** How to effectively manage global strategic ambitions and local recourse capabilities?
- What are the current and future export opportunities for Ukrainian pharmaceutical companies in the CIS markets and beyond? **Case Study:** How to increase profits and achieve sustainable growth by executing a successful export strategy?

Moderator: Vladimir Ignatov, Executive Director, AIPM Ukraine

Andrei Stogniy, Director General, "GlaxoSmithKline Pharmaceuticals Ukraine"

Stanislav Dyachenko, Director of Representative Office Ukraine, Nizhpharm STADA

Vitaliy Gordienko, Head of Representative office, Abbott Laboratories, Ukraine

Ala Ciobanu, General Manager, Roche Ukraine

Vladyslav Pyvovarov, Country Manager, Representative Office in Ukraine, EVER Neuro Pharma

Andrey Shapovalov, General Manager Representative Office, Janssen-Cilag, Ukraine

Sergei Ischenko, Director, Proxima Research

16:00 Coffee Break

16:20 INTERVIEW WITH Eugene Zaika, Country Manager, Nycomed, Ukraine & Moldova;

Interviewer: Dmitriy Gyk, Project Manager, Pharma.net.ua

16:55 Keynote Presentation: Assessing investor appetite for the pharmaceutical sector in Ukraine: overview of capital markets potential, private equity investors' interest and prospects for future M&A deals Brian Best, Managing Director, Investment Banking, Dragon Capital
17:20 Irina Marchenko, Senior Banker, EBRD

17:35 Coffee Break

18:10 Session Four: INTERACTIVE DISCUSSION: «Unfair Competition and Advertising – How to Comply with Current Regulatory Standards»

Moderator: Timur Bondaryev, Senior Partner, Azinger

Welcoming to discussion:

Konstantin Kosyachenko, Advisor to the Minister of Health of Ukraine

Gennadiy Pampukha, President of the EACB (Belgium)

Panelists:

Stefan Woxstrom, Country Manager, AstraZeneca

Oksana Kondratieva, Head, Department of Unfair Competition Investigations, Ukrainian Antimonopoly Committee

Marina Buchma, Head of GR, "GlaxoSmithKline Pharmaceuticals Ukraine"

Tatiana Buts, General Director, Euroapteka

19:15 Chairman's Summation and Close of Day One

19:20 COCKTAIL RECEPTION

Day Two, Wednesday, 20th October 2010

08:15 Registration and Refreshments

09:00 Special Focus Presentation Analytical Market Overview:

Irina Gorlova, General Director, SMD

09:30 Session Five: Reimbursement Policies and Their Influence on the Pharmaceutical Market

- An overview of the development of healthcare funding and reimbursement policies and their influence on the pharmaceutical market. What are the major forces driving and hindering development of a reimbursement model in Ukraine?
- Setting up an innovative and affordable reimbursement system: necessary changes, criteria for reimbursement and wider implications for the pharmaceutical sector
- Study of pricing and reimbursement mechanisms in various countries - which drug reimbursement model would be most appropriate for Ukraine?
- Analysis of the potential impact of reimbursement decisions on industry players: addressing issues such as price agreements between manufacturers and the Government, priority setting in the drug reimbursement system etc
- Is it possible to make drug reimbursement insurance-based? What are the potential benefits for industry stakeholders?

Moderator: Viktor Shafransky, General Manager, Representative Office Ipsen, Ukraine

Rossen Kazakov, Executive Director, BGPharma
Tamas Kovacs, Independent Expert, Hungary
Evgeniy Nikushin, Strategy Development and Projects Director, Pharmaceutical Company
Artur-K

11:00 Coffee Break

11:30 Session Six: Distribution and Retail Panel Discussion “Choosing the Right Business Model for the Future”

Questions to be discussed:

- What are the main obstacles hindering the development of the Ukrainian pharma distribution and retail sectors currently?
- How to create future profit in the distribution, wholesale and retail sectors? What are the growth strategies of the key players likely to be over the next 3-5 years?
- When will we witness the growing integration between distribution and retail and what are the likely implications of this tendency for sector as a whole?
- When will the distribution and retail sectors become attractive to private equity investors and foreign players?

Moderator: Alexander Sukhodolskiy, Strategic Planning Director, BaDM
Inna Demchenko, Advisor to the Head of the State Inspectorate for Quality Control of Medicines of the Ministry of Healthcare of Ukraine
Igor Chervonenko, co-Owner, Farmastor
German Inozemtsev, Deputy General Director for Marketing, Pharmacy Chain 36.6
Evgeniy Nikushin, Strategy Development and Projects Director, Pharmaceutical Company
Artur-K
Vladimir Dudka, Commercial Director, Alba-Ukraine & President, Pharmaceutical Distributors Association PharmUkraine*
Oleg Romanchenko, Marketing Director, Med-Service Group

13:10 Lunch

14:40 Session Seven: Panel Discussion on Practical Aspects of Pricing Decisions in the Ukrainian Pharmaceutical Market

Questions to be discussed:

- What are the regulatory and legal factors influencing pricing decisions?
- Pricing as a sales and marketing tool - what are the main factors influencing companies pricing strategies in the market at the moment?
- Are there fundamental differences between domestic and international pharmaceutical companies pricing strategies? To what extent does generic competition influence the pricing for innovative pharmaceutical drugs in the market at the moment?
- Does parallel trading impact upon pricing strategies?
- Can advertising become a means to justify a higher price for medicine?

Moderator: Igor Kryachok, Director, Morion
Andrei Stogniy, Director General, "GlaxoSmithKline Pharmaceuticals Ukraine"
Vitaliy Gordienko, Head of Representative office, Abbott Laboratories, Ukraine
Vitaly Kiryk, Chief Representative, Polpharma
Alexander Savitskiy, Director, Price Policy Department, Ministry of Economy of Ukraine

16:00 Coffee Break

16:30 Session Eight: Case Studies Session “Operational and Strategic Portfolio Management”

- Driving competitive advantage via effective portfolio management: analysis of the leading companies’ product portfolio strategies for the region. **Case Study:** Linking portfolio management with your corporate strategy
- **Standardisation versus adaptation across countries** – what are the key differences between emerging and mature markets and what are the main factors influencing the pharmaceutical portfolio & product life cycle management strategies of international players working in the market? **Case Study**
- **Analysing the importance of effective product positioning** to achieve optimal portfolio performance – how to increase the total revenue value by effective segmentation and portfolio adaptation? **Case Study:** Adapting your product portfolio in response to changing market conditions
- **New product development and strategic portfolio management** – how to effectively balance a company’s product strategy, customer needs and competitor pipelines. **Case Study:** Launching new products with a limited marketing budget
- **Utilising existing line extension opportunities** for creating profitable revenue streams – what are the opportunities? **Case Study:** expanding the life cycle of existing products
- The importance of strong branding for effective portfolio performance; **Case Study:** Maximising the value of the overall portfolio by building strong product brands

Moderator: Oleg Feldman, General Director, Comcom-Pharma

Iryna Karakai, Head of Representative Office in Ukraine, Boehringer Ingelheim Pharma
Elena Zubko, Country Division Head, Bayer Consumer Care
Aleksandr Kulyk, Head of Marketing Department, Nizhpharm STADA, Ukraine
Oleksiy Mikhaylov, Hospital Business Unit Manager, Janssen-Cilag Ukraine,
Representative Office
Oleg Feldman, General Director, Comcom-Pharma

17:50 Chairman’s summation of Day Two

18:00 Close of Forum