



Features of marketing in international pharmaceutical market in the context of digital transformation

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Abstract. The pharmaceutical market performs a key function of providing the population with medicines, where marketing is the driving force behind meeting the needs for quality healthcare and requires innovative approaches. The research relevance is determined by technological innovations, alongside the severe epidemiological situation in the world and the war in Ukraine, which have changed the requirements for the marketing complex in the pharmaceutical and healthcare markets. The study aimed to deepen the theoretical provisions and develop scientific and practical recommendations for the implementation of marketing innovations in the international pharmaceutical market to increase efficiency and improve and accelerate public access to innovative medicines. The methodological basis was comparative and quantitative methods, tabular analysis and synthesis. The study defined the role of marketing methods and management mechanisms in the international pharmaceutical market. The study analysed the challenges faced by international pharmaceutical market participants related to globalisation and identified the key aspects of international marketing that affect the success of pharmaceutical market management. The study discussed the need to adapt marketing strategies to different cultures and economic conditions inherent in different countries. The study analysed effective methods of promotion in international pharmaceutical markets and examined important aspects of branding and communication to ensure the success of management in the pharmaceutical sector. The study examined modern trends in international marketing in the pharmaceutical sector and identified strategies for adapting to changes in the global economic environment. The role of effective marketing management in creating competitive advantages in international markets was defined, prioritising improvement of the quality of customer service. The study proposed a structural and logical model for the formation of a marketing strategy for the development of business entities in the pharmaceutical market in the global economic space, emphasising their development in the international economic space. The challenges faced by pharmaceutical companies were studied, and the key aspects of international marketing aimed at effective positioning in the global market were identified. The practical significance of the study is determined by the development of a structural and logical model for the formation of a marketing strategy for business entities in the pharmaceutical market, which will contribute to their successful positioning in international markets and increase the efficiency of public access to innovative medicines

Keywords: digital technologies; innovative approaches; competitiveness; communication tools; promotion strategy; customer focus; adaptation of business models

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Introduction

The modern stage of global economic development is characterised by rapid technological changes that significantly affect all aspects of business, including marketing. The pharmaceutical industry, as one of the most innovative and regulated industries, is undergoing a profound transformation due to the introduction of digital technologies in the processes of production, distribution and communication with consumers. L. Olmstead (2023) noted that global digitalisation was stimulating the development of new marketing strategies aimed at improving the efficiency of interaction between manufacturers, distributors and end users of pharmaceutical products.

The peculiarities of the international pharmaceutical market, such as high competition, strict regulation by governments and international organisations, as well as the specifics of consumer demand, render the relevance of adaptation of marketing approaches to the conditions of digital transformation. As noted by N. Voytovych & O. Tereshchuk (2021), digital platforms provided pharmaceutical companies with greater access to consumer information, quick response to changes in demand, and optimisation of marketing campaign costs.

Digital technologies create new opportunities for expanding markets, personalising offers and optimising costs, while also posing challenges related to data security, ethical compliance and maintaining consumer trust. O. Penkova *et al.* (2022) determined that in these conditions, effective marketing in the international pharmaceutical market required not only the use of modern tools such as Big Data, artificial intelligence, the Internet of Things or blockchain, but also a deep understanding of regional characteristics, cultural differences and regulatory requirements in different countries.

L. Kudyrko (2024) also highlighted the priorities of marketing activities of international pharmaceutical companies, noting that digital transformation was a key factor in market development. The researcher emphasised the importance of implementing integrated strategies in view of the current challenges of globalisation. In addition, N. Stezhko & O. Shevchuk (2023) studied global trends in e-commerce and its role in transforming consumer behaviour. Their findings confirmed the need to use modern digital solutions to maintain the competitiveness of pharmaceutical companies.

Of particular interest was the study of the impact of digital transformation on international marketing strategies, on communication tools, customer interaction models and processes of forming competitive advantages. M.H. Reza (2020) noted that the analysis of these aspects outlined new approaches to the management of marketing activities in the international pharmaceutical market and determined the prospects for further development of the industry in the context of digitalisation.

Given the rapid pace of digital development, the international pharmaceutical market faced the need to adapt traditional business models to new conditions,

which required a rethinking of approaches to marketing activities. In particular, the development of integrated marketing strategies has become an important element of success for companies seeking to maintain and strengthen their positions in the global competition.

The authors J. He *et al.* (2019) emphasised that the introduction of artificial intelligence technologies in the field of medicine, including the pharmaceutical industry, contributes to improving the efficiency of management processes, prompt response to changes in consumer preferences, as well as the formation of new communication formats based on transparency and trust between companies and patients. T. Minero & L. Kuger (2024) noted that the development of digital distribution channels and e-commerce were key in the transformation of pharmaceutical marketing. These changes restructured international supply chains, providing better access to wide consumer segments. The authors emphasised the importance of integrating artificial intelligence, data analytics and machine learning to improve the accuracy of demand forecasting, inventory management and personalisation of marketing strategies. The digitalisation environment was creating new expectations among consumers focused on speed, convenience and individual approaches from pharmaceutical companies.

Notably, in the context of digital transformation, competition in the international pharmaceutical market was not only intensifying, but also the role of ethics and social responsibility was growing. Companies were forced to incorporate the protection of personal data, transparency of information about products and services, and promote the availability of quality medicines to the general population. In this context, there was a need to develop new marketing standards that considered global digitalisation trends and the specifics of the pharmaceutical industry. In addition, the COVID-19 pandemic has revealed the shortcomings of traditional communication technologies, shifting the focus of pharmaceutical marketing to innovative digital channels, the effectiveness of which required further research. Studying innovative approaches to marketing in the international pharmaceutical market and developing recommendations for their implementation was a necessary task.

Materials and Methods

The methodological basis of the study was system analysis, comparative analysis, strategic analysis, logical and structural modelling, formalisation and statistical analysis. The theoretical method ensured the study of the theories of digitalisation of marketing processes in the pharmaceutical sector, in particular, the concepts of the strategy for promoting innovative medicines developed based on the works of I.O. Sovershenna & A.O. Kubrak (2019), who analysed the use of digital technologies to improve the effectiveness of marketing strategies through the integration of online platforms,

social networks and analytical tools to more accurately identify the target audience. At the same time, N. Voytovych & O. Tereshchuk (2021) proposed the adaptation of marketing strategies to the conditions of digital transformation, emphasising the importance of using digital platforms to collect and analyse consumer data, which ensured quick response to changes in demand and optimise the cost of marketing campaigns. Additionally, the concepts of drug promotion in the pharmaceutical industry were supported by the strategic marketing methodology developed by Ya. Larina *et al.* (2023), proposed the integration of innovative technologies for effective market analysis, consumer needs and the competitive environment. It was studied the models of development of the international pharmaceutical market presented in the World Economic Forum reports (2018-2023) and the results of the analysis conducted by O. Penkova *et al.* (2022). This formulated new hypotheses on the integration of innovative approaches into the marketing activities of the pharmaceutical industry.

The statistical method was used to collect and analyse data on the volume of exports and imports of medicines, the dynamics of marketing costs in different countries and the results of the implementation of innovative strategies. In particular, the data obtained from the PharmXplorer (2023) analytical system assessed the structure of the Ukrainian pharmaceutical market and its development trends. In addition, the statistical information provided by the State Statistics Service of Ukraine (2025) contributed to the analysis of changes in the consumption of medicines and the impact of marketing strategies on their demand. Moreover, one of the sources of analysis of the pharmaceutical market of Ukraine was the Resolution of the Cabinet of Ministers of Ukraine No. 542 (2022), which addressed changes in the regulatory policy of the pharmaceutical sector under martial law.

The analytical method was used to identify the main problems, including the insufficient use of digital communication channels in the promotion of medicines, delays in adapting international innovations to the local market, and the high cost of marketing promotion. These problems were specified based on the IMD World Digital Competitiveness Ranking (2017-2024) reports, which highlighted the state of competitiveness of the pharmaceutical industry. Logical and structural modelling developed a system for forming a marketing strategy that incorporated global digitalisation trends and the specifics of the Ukrainian pharmaceutical market. In the process, an algorithm for the implementation of digital marketing tools was created, based on the models proposed in the analysed reports.

The analysis of the data created a profile of the international pharmaceutical market, determined the dynamics of key indicators of its development, such as marketing costs, the level of digitalisation and investment, and modelled a system for forming a marketing strategy for the development of business entities in the

global economic space. This became the basis for the development of scientific and practical recommendations aimed at integrating innovative approaches to marketing, which ensure increased efficiency and improved access to innovative medicines for the population.

Results and Discussion

The pharmaceutical industry in Ukraine in 2025 has become one of the most profitable and dynamic sectors, and the Ukrainian pharmaceutical market was key in ensuring access to medical services and products for the population. This industry is an important part of both the domestic and international markets, which includes the production of medical devices and medicines, wholesale and retail trade, logistics networks and storage and distribution systems, which largely determine the national security of each country. Therefore, the pharmaceutical sector is a large knowledge-intensive industry with developed cooperation. At the same time, dynamic changes in patient flow and dominant pathologies require doctors to quickly master new therapies and drugs, and pharmaceutical companies to urgently provide the public and hospitals with drugs and information on the effective and safe use of these drugs. Given that this sector is key in the market and significantly affects the national and defence security of the country, it is an important component.

During 2022-2025, Ukraine suffered from a full-scale Russian invasion, but despite the temporary occupation of the territories, the loss of a significant number of people due to migration abroad and those, who remained in the temporarily occupied territories, the destruction of infrastructure and enterprises, the country's economy was developing faster than expected in early 2023. I.A. Popova & A.V. Serdyuk (2023) noted that the war in Ukraine caused large-scale disruptions in logistics, raw material supply, and the functioning of pharmaceutical production. The destruction of infrastructure, migration of the population, reduced purchasing power, and export restrictions have significantly hampered the industry. At the same time, as the authors emphasised, pharmaceutical companies were forced to adapt quickly, introducing new distribution models and digital tools to maintain public access to medicines.

The war in Ukraine has demonstrated the vulnerability of the traditional marketing mix in a situation, where there was a mass migration of the population, a threat to the lives and health of doctors and patients in entire regions, and in other regions, the patient flow of hospitals and pharmacies has increased so much that the impact of traditional communication channels was impossible. Ukrainian and international institutions have repeatedly improved their forecasts for the development of the Ukrainian economy in 2023. Ukrainian real GDP growth in 2023 was 5.3% after a significant drop of 28.8% in 2022 (IMD World Digital Competitiveness Ranking 2022, 2022). According to the World Bank's

forecasts, GDP growth was expected to reach 3.2% in 2024 and 6.5% in 2025, which was the highest among the countries of the Europe and Central Asia region (IMD World Digital Competitiveness Ranking 2024, 2024).

In this context, the study by L. Kudyrko (2025) on the role of innovative companies in ensuring competitiveness in the international pharmaceutical market was noteworthy. The impact of digital technologies on business management in crisis conditions was emphasised. The study by I. Byshovets (2024) on modern digital communication channels in the pharmaceutical industry was noteworthy. The author emphasised that the use of email, mobile applications and social media significantly improves the efficiency of companies' interaction with end consumers. It was also worth mentioning the study by A.B. Olkhovska & V.V. Malyi (2018), in which the authors theoretically substantiated the directions of development of marketing communications in the pharmaceutical market in the context of social and ethical promotion. This was especially relevant in war-time, when the issues of brand trust and transparency become even more important.

The pharmaceutical market of Ukraine was substantial in ensuring access to medical services and products for the population. Based on data from the

PharmXplorer (2023) market research analytical system, in 2021 the value of the pharmaceuticals and medical devices market reached approximately 116.6 billion UAH, an increase of 10.7% compared to 2020. Therefore, the pharmaceutical sector remained one of the largest and fastest-growing segments of the Ukrainian economy. In 2023, total retail sales of all pharmacy basket goods amounted to 164 billion UAH, which was 29% more than in 2022. Compared to pre-war 2021, the growth was 20%. In physical terms, pharmacy sales totalled 1.3bn packs, up 3% compared to 2022, but down 27% compared to 2021. In USD, the growth rate in 2023 was 13% compared to 2022, and decreased by 10% compared to 2021, which was due to a significant appreciation of the exchange rate after the Russian full-scale invasion of Ukraine.

Ukrainian pharmaceutical sector continued to steadily grow in a challenging economic environment. According to the PharmXplorer (2023) analytical system, the value of the pharmaceuticals and medical devices market in 2021 increased by 10.7% compared to 2020. This was the result of both stable demand for medicines and significant development of other categories of pharmaceutical products. Table 1 provided data on retail sales of various categories of the pharmaceutical sector in 2021-2024.

Table 1. Retail sales of various categories of the pharmaceutical sector in 2021-2024

Year	The market as a whole		Medicine			Cosmetics			Dietary supplements			Medical devices		
	million UAH	Δ, %	million UAH	Δ, %	share	million UAH	Δ, %	share	million UAH	Δ, %	share	million UAH	Δ, %	share
2021	1,36794.8	20	1,10558.6	19.2	80.8	4583	18	3.4	1,1549.4	43.8	8.4	1,0103	8	7
2022	1,26975.4	-7.2	1,03849.5	-6.1	81.8	4367	-5	3.4	1,0441.2	-9.6	8.2	8317	17	6
2023	1,63996.4	29.2	1,29958.2	25.1	79.2	6512	49	4	1,7078.6	63.6	10.4	1,0447	26	6
2024	1,92000.0	17.0	1,52000.0	17.0	79.2	7500	15.2	3.9	2,1800.0	27.7	11.4	1,0700	2.4	5.5

Source: IMD World Digital Competitiveness Ranking (2017-2024), Pharmacy sales in the first half of 2024 (2024), Pharmacy sale (2025)

An analysis of retail sales of different categories over the reporting period showed an increase in sales, which was typical for all product categories, with the "dietary supplements" segment growing at a much higher rate than other categories (The farm market ends the..., 2023). The main factors of market growth include:

- ▣ demographic and epidemiological factors, including population ageing and the spread of chronic diseases, which affect the demand for medicines and medical devices;

- ▣ development of the medical infrastructure, namely an increase in the number of hospitals, clinics and pharmacies, which helps to improve the availability of medical services and goods to the population;

- ▣ innovations and technological progress, which is associated with the introduction of the latest technologies in the production of medicines and increases their effectiveness and reduce side effects.

Furthermore, in analysis of the growth factors of the pharmaceutical market, it was necessary to account for

the active stockpiling of supplies due to Russian armed aggression against Ukraine, including not only water and food, but also medicines, especially those needed for patients with chronic diseases, which has significantly increased sales of medicines.

In the context of digital transformation, the pharmaceutical market was actively interacting with new technologies, which improved the competitiveness of the companies and ensure further growth in the context of rapid change. One of the key factors of development was the level of mobile connectivity and Internet access, which directly affected the effectiveness of digital strategies. According to the Mobile Connectivity Index (2022), countries with high levels of mobile connectivity have significant advantages in implementing digital solutions that can be used to adapt to market needs faster and provide a high level of customer service.

Concerning the innovative development of the pharmaceutical sector in Ukraine, innovative marketing as a significant element of the global value chain was a

valuable source of competitive advantage for pharmaceutical companies in the international pharmaceutical market. At the same time, amid globalisation, the potential accession of Ukraine to the EU and the historically high development of pharmaceutical production in Ukraine, it was reasonable to explore potential competitive advantages for Ukrainian manufacturers to enter international markets. In 2024, local companies accounted for half of the top 10 pharmaceutical manufacturers in Ukraine, and the top 2 leaders of Ukrainian production, Farmak and Darnitsa, were at the top of this ranking (Pharmaceutical sales in the first half of 2024, 2024; Pharmaceutical sales, 2025). The largest representatives of Ukrainian pharmaceuticals in the top 10 have already entered international markets, but the share of exports

is still small. At the same time, Ukraine has lost about a quarter of its internal consumers due to the war and migration, but has retained its production potential, including several pharmaceutical production facilities that have suffered, but they were not among the largest producers. This process created a significant export potential that can be realised. The post-war recovery of the country will involve focusing on the most promising sectors, and pharmaceutical production has every reason to be among them. Table 2 showed the distribution of market shares among the major players in the pharmaceutical sector. In 2023, all companies in the Top 20 demonstrated growth in sales, with Farmak, Darnytsia and Teva becoming the leaders in sales of medicines and dietary supplements.

Table 2. Positions of the main participants of the Ukrainian pharmaceutical market in 2019-2024, %

Market Org	year	2019	2020	2021	2022	2023	2024
Total		100.00	100.00	100.00	100.00	100.00	100.00
Farmak JSCo (Kyiv, Ukraine)		5.39	5.10	5.30	4.86	5.30	5.40
Darnytsia PrJSC (Kyiv, Ukraine)		3.10	3.26	2.93	3.98	4.45	4.50
Arterium Corporation OJSC (Kyiv, Ukraine)		3.60	3.60	2.81	2.86	2.89	3.00
Yuria-Pharm LLC (Kyiv, Ukraine)		3.16	3.37	3.21	2.79	2.58	2.60
Sanofi (France)		3.21	3.01	2.80	2.90	2.24	2.20
Teva (Israel)		2.86	2.87	2.54	2.85	2.74	2.80
Acino (Switzerland)		2.53	2.47	2.48	2.97	2.69	2.70
Kyiv vitamin factory JSCo (Kyiv, Ukraine)		2.12	2.19	2.04	2.52	2.66	2.65
Berlin-Chemie/Menarini Group (Germany)		2.33	2.29	2.18	2.43	2.31	2.35
KRKA (Slovenia)		2.18	2.21	2.14	2.55	2.38	2.40
Delta Medical LLC (Vyshneve, Ukraine)		2.21	2.03	1.98	2.17	2.37	2.40
Zdoroviye LLC (Kharkiv, Ukraine)		2.53	2.53	2.02	1.79	1.50	1.60
Kusum Pharm LLC (Kyiv, Ukraine)		1.95	1.93	1.83	2.11	2.10	2.15
Sandoz (Switzerland)		2.25	2.05	1.61	1.58	1.41	1.45
Servier (France)		1.27	1.26	1.26	1.62	1.51	1.55
Pfizer Inc. (USA)		0.61	1.01	3.59	0.60	0.61	0.65
Reckitt Benckiser Healthcare International (Great Britain)		1.30	1.20	1.17	1.34	1.28	1.30
Bayer Pharmaceuticals (Germany)		1.10	1.21	1.42	1.32	1.07	1.10
Abbott Products GmbH (Germany)		1.02	1.07	1.10	1.28	1.25	1.30
Borschagovsky ChPhP PJSC (Kyiv, Ukraine)		1.20	1.19	1.02	1.03	0.95	0.90
Other		54.09	54.14	54.59	54.44	55.72	54.60

Source: IMD World Digital Competitiveness Ranking (2017-2024), Pharmacy sales in the first half of 2024 (2024), Pharmacy sale (2025)

In 2024, in the modern economic situation, the achievement of high results in the company's activities cannot be ensured solely by the quality of goods, including pharmaceuticals, and the conditions of their sale. The pharmacy market was characterised by a significant number of competitors, which required a detailed approach to developing a strategy for operating and behaving in the market. To succeed, each pharmacy

must focus on the specifics of promoting pharmaceuticals, using all available tools in this process. Technological innovations, together with global changes in the epidemiological situation, have significantly changed the requirements for promotion formats in the pharmaceutical industry, as well as the speed and formats of research required by pharmaceutical companies and other healthcare sector players (Table 3).

Table 3. Sales structure of prescription and over-the-counter drugs in 2019-2024

Year	Prescription, million UAH	Over-the-counter, million UAH	Share of prescription drugs in the total volume, %	Share of over-the-counter in the total volume, %	Rx, EI	OTC, EI	Rx, GR, %	OTC, GR, %
2019	63,348.74	33,350.52	65.5	34.5	102	96	16.09	9.00
2020	72,111.88	35,398.10	67.1	32.9	102	95	13.83	6.14

Table 3, Continued

Year	Prescription, million UAH	Over-the-counter, million UAH	Share of prescription drugs in the total volume, %	Share of over-the-counter in the total volume, %	Rx, EI	OTC, EI	Rx, GR, %	OTC, GR, %
2021	93,701.20	41,089.50	69.5	30.5	104	93	29.94	16.08
2022	77,040.88	39,992.24	65.8	34.2	95	112	-17.78	-2.67
2023	96,470.07	49,281.26	66.2	33.8	101	99	25.22	23.23
2024	104,500.00	52,000.00	66.5	33.5	100	98	20	18.00

Source: IMD World Digital Competitiveness Ranking (2017-2024), Pharmacy sales in the first half of 2024 (2024), Pharmacy sale (2025)

The potential ban on TV advertising until 2024 has prompted pharmaceutical companies to reconsider the structure of their marketing mix in favour of trade marketing, and remote and digital communications. Global requirements for the pharmaceutical industry in terms of social responsibility and customer focus have prompted pharmaceutical companies to introduce "patient centricity" as a key factor in competitiveness. Consequently, patient support programmes with a focus on quality service and communication with patients are very popular. Remote communications, which the agency specialises in, were becoming an increasingly important part of the marketing mix of pharmaceutical companies, while the uncertainty of the situation encourages companies to research the market, seek new ideas, test content, and strengthen interaction with pharmacy retailers.

Thus, in the modern conditions of development, the efficiency of the Ukrainian farmers' market depended on the quality of marketing. Ensuring the quality of marketing depended on the performance of the following functions: analytical research of the market, target audience, competitors, and products; production organisation, introduction of new technologies, product quality and competitiveness; sales channel organisation, logistics, product and pricing policy, market promotion; management strategic and tactical planning, control, information support.

The key factors that ensured the quality of marketing were suppliers, consumers, service, social and business activities of the company and reputation. In the process of creating marketing standards, the following groups of standards and areas of their application should be identified (Quality management toolkit for..., 2024):

- ▣ organisational standards: trade mark standard; equipment standard; premises design standard; employee appearance standard; sanitary and hygiene standard;

- ▣ qualification standards: the standard of employees' education; the standard of employees' experience for performing a certain type of work; the standard of regular professional development;

- ▣ production and service standards: standard for accepting orders; standard for working hours (work schedule); standard for employee behaviour; standard

for production or service provision (with production standards, deadlines and quality criteria); standard for payment;

- ▣ security standards.

Marketing quality standards should be reflected in all areas of the company's activities procedures and regulations. The developed marketing quality standards must be reflected in the organisational structure, budget structure, and personnel requirements (Quality management toolkit for..., 2024). However, to streamline and improve these processes and manage the risks associated with them, quality criteria need to be defined. Further, it was necessary to collect statistics on deviations from the established quality standards. By analysing deviations from the standards, it was possible to determine their causes and take corrective action, as well as develop a programme of preventive actions (as part of the risk management system), including making appropriate adjustments to the project support procedure.

The first step on the way to quality management should be a quality policy, which will contain the following sections: distribution of areas of responsibility for quality: management responsibility and employee responsibility; a list of requirements for the quality of the main production processes; requirements for the qualification of specialists; process audit: regularity, procedure, results, consequences, responsibility for the implementation of audit findings; personnel certification (Tokmenko, 2024).

The requirements for the quality of production processes in pharmaceutical facilities are partially described in the standard operating procedure for project support in the respective companies (Quality management toolkit for..., 2024). The timing of the processes is specified, and the project lead time was one of the important requirements of clients. Furthermore, based on the definition of quality as "compliance with customer requirements", the documented recording of customer requirements in a brief, which has already been formalised, and the implementation of the project following the terms of the brief should guarantee 100% project quality and customer satisfaction. There are two areas of quality management: internal and external, so executing projects following the terms of the brief and the standards set within the company does not mean client

satisfaction. As a marketing and research agency that operated in the service sector, external quality management requires constant improvement, as services were assessed subjectively.

To objectify the evaluation of services, it was necessary to clarify and record in writing the project goals and indicators by which they will be measured at the start of the project. At the same time, in the development of a creative, there were no quantitative criteria for achieving the goal, but it was necessary to define quality criteria. Such criteria may include the number of creative options provided to the client for consideration, mandatory visualisation of each option, and presentation of the creative only at the meeting (to receive direct feedback from the client).

A risk management system should be an important component of the quality management system.

Pharmaceutical companies have already developed and implemented a risk management policy. It was based on the DSTU standard IEC/ISO 31010:2013 (2014) and defined risk categories, risk owners, the risk management process, and the classification and form of the risk register. However, for this policy to be implemented, it was necessary to complete all the stages specified in the risk management process, namely: risk identification and description; risk assessment; development and implementation of risk management actions; risk monitoring; reporting (Quality management toolkit for..., 2024). It was worth noting that the list of these risks included those that can significantly affect the quality of services provided by the company, therefore Table 4 considered these hazards, described them more specifically and suggested possible measures and recommendations for their avoidance or reduction.

Table 4. Preventive actions to reduce the risks of hazards for pharmaceutical companies

Danger	Proactive actions to reduce the risk of hazards
Dependence on key employees (including their expertise): most relevant for sales managers, analysts and trade marketing executives	Create a knowledge management system. Create and maintain a talent pool. Manage employee loyalty (measure loyalty and job satisfaction, motivate employees, development plans)
Lack of an established internal control system: normative indicators are measured, but deviations need to be monitored	Develop and implement a quality management policy that includes both standards (including resource consumption rates) and a process for dealing with deviations from standards, internal audits and corrective action procedures
Inefficient use of enterprise resources	The pharmaceutical company has a project support system that describes the norms of working time spent on key processes. In addition, a quality management policy should be developed and implemented
Lack of competencies and lack of innovative ideas necessary for enterprise development – competitiveness risks	Annually plan visits to educational and innovation events to find new ideas and record new ideas as a result of learning. The creation of a knowledge management system, in particular, involves the creation of an “idea bank”. Approval and implementation of the annual development plan is an integral part of the ongoing work of the management
Dependence on suppliers, no alternative	Develop and implement a tender procedure that includes tenders with at least three participating suppliers and at least two contracts with suppliers (primary and secondary)
Poor quality of services from suppliers and/or partners	Develop and implement a tender procedure that includes a detailed check of the contractor for compliance with quality requirements, deadlines, and compliance with standards
Risks of technical failures of hardware, software and data transmission channels	Develop and implement an IT security policy that includes: the distribution of access to information in the company's information system (access rights policy); audit and proper updating of the IT infrastructure, provision of backup capacities and information transmission channels; backup regulations for the entire company's information system; backup is performed and the IT infrastructure is updated, but reactively (due to problems), not planned, without anticipating possible system limitations that arise
Loss of backup copies of infrastructure, data storage and/or information within the processes and operations to be protected	

Source: developed by the authors

Thus, the analysis of the risks of hazards of enterprises in the pharmaceutical sector has proved that research in the field of pharmaceutical marketing in Ukraine has played a key role in shaping the development strategies of the national pharmaceutical industry in the global economic space. At this stage, there was a need to modernise the system of marketing strategy development to ensure its flexibility, dynamism and efficiency. Management of the pharmaceutical industry in Ukraine requires coherence of market opportunities

and innovative development of the industry. This means that the main management processes should be aimed at attracting the latest marketing approaches that will ensure effective use of the opportunities in the international market.

In the context of the global economic situation, the company's success cannot be achieved solely through the quality of its products, including pharmaceuticals, and the terms of its sale. The pharmacy market has a significant number of competitors, which required a careful

approach to the development of a strategy and market behaviour. To succeed, each pharmacy must account for the specifics of promoting pharmaceutical products using all available tools. Technological innovations, together with changes in the epidemiological situation around

the world, have significantly changed the requirements for promotion methods in the pharmaceutical industry, as well as the speed and type of research required by pharmaceutical companies and other healthcare industry players (Fig. 1).

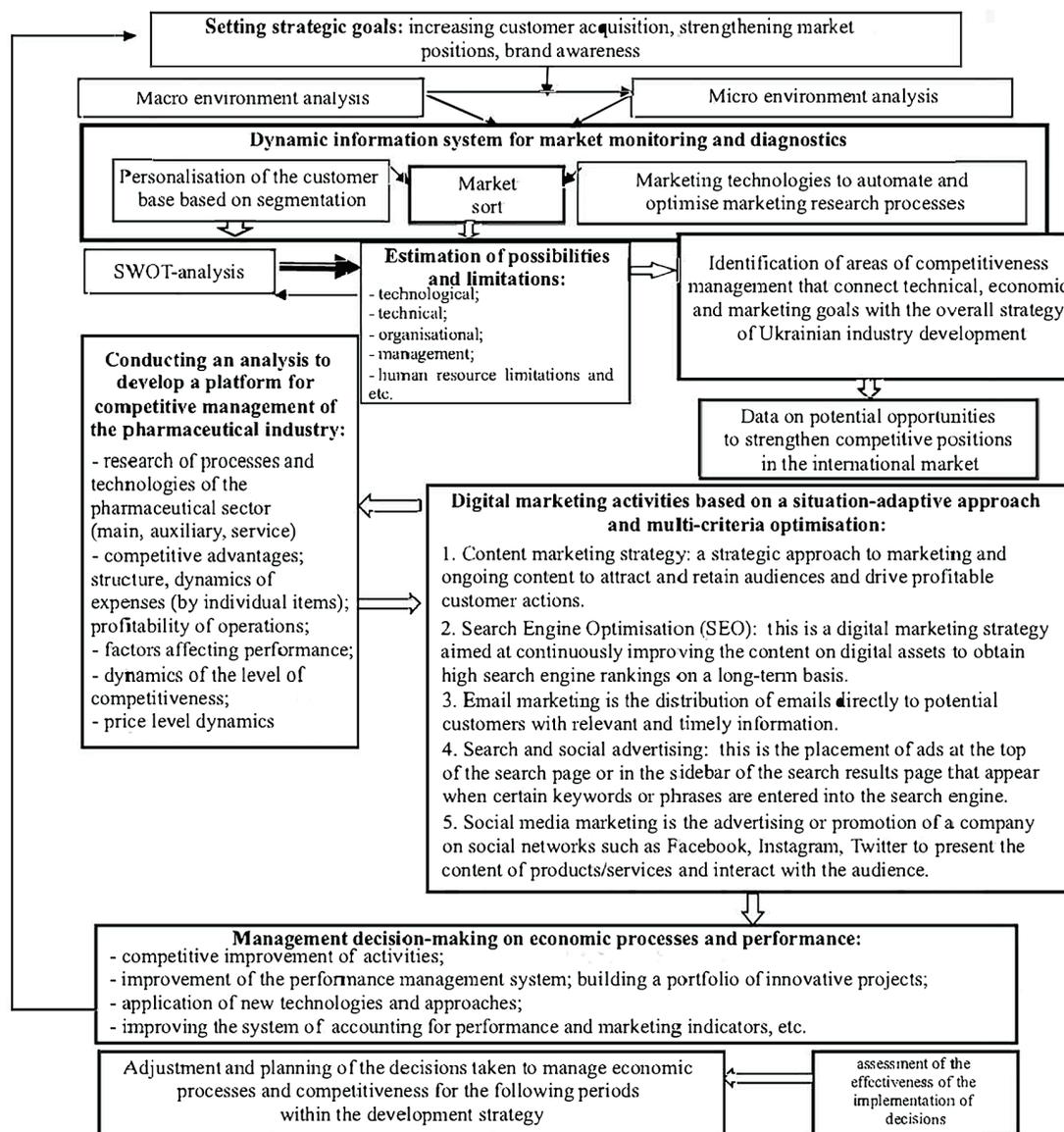


Figure 1. A model for forming a marketing strategy for the development of the pharmaceutical industry using digital marketing tools in the global economic space

Source: compiled by the authors

The analysis of the structure of promotions in the pharmaceutical sector in 2019-2024 demonstrated significant changes in the preferences for using different channels. Table 5 showed that online advertising and information showed a steady increase in popularity, which became noticeable in 2020. In 2023, the share of this channel among pharmacists reached 6.86%, which was 8 times higher than in 2019, when this indicator was not included in the structure at all. In 2024, the share increased to 7.00%. Visits by medical representatives,

although still the main promotional tool, gradually decreased from 43.70% in 2019 to 31.00% in 2024, which indicated that companies were adapting to new conditions, including the digitalisation of processes. Remote communication ranked second among the channels and showed a steady growth trend, increasing from 14.31% in 2019 to 22.00% in 2024. TV and video advertising also gradually gained popularity, increasing from 6.89% in 2019 to 9.50% in 2024, which could be due to the growing interest in visual content among pharmacists. Other

types of promotions, such as POS materials and advertising in the specialised press, have lost their relevance, which was reflected in the gradual decline in their share in the total volume of promotions.

Table 5. Promotions in the pharmaceutical sector by channel in 2019-2024 (pharmacists), %

Type of promotion	Period	2019	2020	2021	2022	2023	2024
Total		100.00	100.00	100.00	100.00	100.00	100.00
01. Visits of the medical representatives		43.70	32.17	30.51	31.82	32.06	31.00
02. Remote communication		14.31	21.58	21.09	21.92	20.23	22.00
03. Advertising in specialised press		12.92	14.79	12.57	7.23	8.82	8.50
04. TV advertising/Video		6.89	7.93	8.54	9.16	9.20	9.50
05. POS materials		7.53	7.27	6.44	6.40	5.38	5.10
06. Shares		4.58	6.03	6.03	6.36	6.63	6.80
07. Events/Conferences		6.28	3.65	2.91	1.90	3.66	3.80
08. Advertising/Information on the Internet		-	0.83	4.58	5.37	6.86	7.00
09. Promotions through medical representative calls		1.19	2.38	3.51	6.67	3.72	3.50
10. Email newsletter		1.23	2.25	2.25	1.59	1.78	1.60
Other		1.38	1.10	1.56	1.56	1.66	1.80

Source: IMD World Digital Competitiveness Ranking (2017-2024), Pharmacy sales in the first half of 2024 (2024), Pharmacy sale (2025)

It was worth highlighting events and conferences, which reached 3.80% in 2024. This growth may be a result of the gradual resumption of traditional interaction formats after the COVID-19 pandemic, when a significant number of events were moved online. This resumption of activity in holding conferences and events may also indicate new approaches to the development of professional relationships in the pharmaceutical industry, which facilitated the integration of more participants in the physical format. This process was also accompanied by the growing influence of digital channels in the promotion of medicines and healthcare services. Digital technologies and online platforms have become an integral part of pharmaceutical companies' marketing campaigns, providing opportunities for more effective interaction with end users, healthcare professionals and other stakeholders (Larina *et al.*, 2023).

In the context of the growing role of digital technologies in business, an analysis of The Digital Economy and Society Index (DESI) (2022) was essential. According to this source, the level of integration of digital solutions

into business activities differs significantly between EU countries. For instance, in Denmark, 62% of companies use cloud technologies, while the EU average was only 34%, indicating a high level of digital maturity in the business environment. In contrast, in Poland, the figure was only 19% and the use of Big Data technologies was 8%, indicating a slower adoption of digital tools. These differences demonstrated the extent to which the introduction of digital platforms, automated management systems and analytical technologies can improve the efficiency of pharmaceutical companies in different countries, as well as influence their competitiveness in the international environment.

The trend towards digitalisation was relevant as the importance of digital channels for pharmacists and doctors was growing. These changes were confirmed by the data in Table 5, which demonstrated how the resumption of traditional event formats coexisted with a significant increase in the influence of digital channels. These trends also have their characteristics in the context of interaction with doctors, as shown in Table 6.

Table 6. Promotions in the pharmaceutical sector by channel in 2019-2023 (pharmacists), %

Type of promotion	Year	2019	2020	2021	2022	2023	2024
Total		100.00	100.00	100.00	100.00	100.00	100.00
01. Visits of the medical representatives		53.74	37.01	40.62	39.58	39.23	37.00
02. Remote communication		9.80	17.85	16.15	18.78	17.75	19.00
03. Events/Conferences		14.00	15.42	14.66	11.05	12.95	12.50
04. Advertising in specialised press		9.38	9.60	8.66	7.33	7.39	7.20
05. Promotions through medical representative calls		1.25	4.96	4.41	8.93	6.71	6.50
06. Email newsletter		2.94	6.32	5.65	4.43	5.03	5.50
07. TV advertising/Video		4.97	4.69	4.78	3.82	4.35	4.60
08. Advertising/Information on the Internet		1.67	2.12	3.43	4.90	5.24	6.00
09. Newsletter campaigns		2.25	2.03	1.28	0.36	0.33	0.30
10. Advertising on the radio		-	-	0.36	0.82	1.02	1.20

Source: IMD World Digital Competitiveness Ranking (2017-2024), Pharmacy sales in the first half of 2024 (2024), Pharmacy sale (2025)

Digital marketing was one of the key tools that provide flexibility and high dynamics in the management of the pharmaceutical industry. This tool included the use of digital technologies, social networks, search platforms and other online resources to advertise and promote products on the market. The implementation of digital marketing ensured the effectiveness of the monitoring information system and the adaptability of management processes in this area (Fig. 1). The model of forming a marketing strategy for the development of business entities in the pharmaceutical market presented in the study illustrated the relationship between the formation of a marketing strategy for the development of the pharmaceutical industry in Ukraine and key management processes. This relationship demonstrated how the introduction of digital marketing has contributed to increased efficiency and flexibility in solving strategic tasks.

The use of digital marketing in the pharmaceutical industry in Ukraine created significant opportunities for promoting medicines, attracting new customers and increasing sales. This has provided a competitive advantage to companies in the market environment and stimulated the innovative development of the sector. The use of digital technologies in marketing strategies not only contributed to the effective promotion of products, but also helped to establish strong relationships with customers, increase their loyalty and provide comprehensive information about the drugs and their use. Thus, the introduction of digital marketing is an important strategic development area that strengthens the competitiveness of the Ukrainian pharmaceutical industry at the international level.

The prospects for marketing pharmaceutical products to international markets and expanding services abroad are quite favourable. Ukrainian pharmaceutical companies can provide high-quality and fast service at an affordable price, which distinguishes them from their expensive foreign counterparts, which often have longer delivery times. In particular, the popularisation of pharmaceutical services abroad can be achieved not only through an active advertising campaign but also through the introduction of referral programmes.

Many Ukrainians who are familiar with Ukrainian pharmaceutical brands are abroad and can recommend Ukrainian products to the local population. This will be effective if customers are offered bonuses or discounts for such activity. Thus, the use of digital marketing stimulates the development of the pharmaceutical sector in the context of globalisation and the active spread of digital technologies. According to V. Pashkov & Ye. Gnedyk (2022), the importance of this industry was manifested in a large number of research and innovation activities focused on developments, technologies and equipment that took place in the sector (about 48% of pharmaceutical companies were engaged in innovative activities in the field of research and development).

Scientists I.F. Prokopenko *et al.* (2021) emphasised that effective marketing management in the pharmaceutical sector contributed to increasing competitiveness in the international market using innovative strategies. The authors noted that the key success factors were adaptation to changes in the global environment and integration of digital tools into marketing activities. I. Petrova & Ye. Loiko (2022) noted that the "big players" in the market actively used marketing strategies to achieve their goals in the competition. The researchers emphasised the importance of developing strategies that incorporate the peculiarities of international markets and were aimed at maintaining leadership positions in the long term.

I.A. Popova *et al.* (2023) studied the adaptation of marketing approaches in the pharmaceutical sector to the current conditions of digital transformation. The researchers emphasised that the COVID-19 pandemic has become a catalyst for changes in the system of communication and promotion of pharmaceutical products, through an emphasis on remote and digital channels of interaction with customers. M.H. Reza (2020) analysed the role of innovative technologies in global marketing, emphasising that the use of digital tools in the pharmaceutical sector not only increases efficiency, but also reduces the costs associated with product promotion, which was critical in a competitive environment.

Researchers T. Tsygankova *et al.* (2022) considered the challenges of globalisation for the international pharmaceutical market, in particular the need to adapt marketing strategies to different cultural and economic conditions. The author emphasised the importance of using localised approaches to achieve effective communication with the target audience. O.O. Shmalko (2022) stated that the pharmaceutical market of Ukraine played a key role in ensuring access to medical services and products for the population. In 2021, the market volume of pharmaceuticals and medical devices reached approximately 116.6 billion UAH, which was 10.7% more than in 2020. This meant that the pharmaceutical sector remained one of the largest segments of the Ukrainian economy.

P. Shevchuk & B. Derhaliuk (2022) and I. Lylyk (2024) highlighted the division of the market by segments, in particular, patented drugs, which covered the production and sale of medicines of well-known global brands such as Pfizer, Novartis, Sanofi, GlaxoSmithKline. In 2021, the value of patented drugs was approximately 56 billion UAH. These drugs were usually more expensive, but they were known for their effectiveness and safety; generic drugs. Generic drugs were more affordable analogues of patented drugs. In 2021, their value was about 60 billion UAH. These medicines have reduced treatment costs and made treatment more affordable for most of the population; imported medicines Ukraine imports a significant amount of medicines from other countries. In 2021, the value of imported medicines was approximately 40 billion UAH. These drugs were known

for their high quality and effectiveness, making them popular among doctors and patients.

Conclusions

The study determined that the modern pharmaceutical market of Ukraine was characterised by significant development potential due to the active digitalisation of business processes and the introduction of innovative marketing approaches. Competition in the pharmaceutical market was growing, which required companies to improve their marketing strategies.

Digital marketing, as one of the key tools of modern business, has demonstrated significant opportunities for the development of the pharmaceutical industry. The introduction of digital technologies expanded the sales market, attracted new customers and increased customer loyalty, which has ensured the competitiveness of Ukrainian pharmaceutical companies in both internal and international markets.

The results of the analysis demonstrated that one of the main challenges for the pharmaceutical business was to adapt to new market conditions, in particular through the integration of digital marketing tools. The successful implementation of digital strategies optimised costs, increased market share and improved brand awareness. At the same time, the development of the pharmaceutical market was largely dependent on external factors, such as economic stability, international support and demographic changes.

The presented model of forming a marketing strategy for the development of business entities in the pharmaceutical market was essential for the formation of strategic approaches to improving the competitiveness of pharmaceutical companies in the modern environment, in particular in the context of active implementation of digital technologies and optimisation of marketing processes. It combined analysis of the macroeconomic

environment, use of dynamic information systems for market monitoring and assessment of competitive advantages, which ensured quick response to changes in the external environment and adapt their strategies to ensure sustainable development. The model was used as the basis for building effective digital marketing strategies, including the creation of relevant content, search engine optimisation, and the active use of social media to attract customers. Thanks to integrated data obtained from market monitoring and screening systems, companies were able to quickly assess limitations and opportunities related to technological, organisational and managerial factors. This approach not only adapted business strategies promptly, but also optimised resources, reducing costs and increasing the efficiency of interaction with end users and partners. The model also ensured a continuous assessment of competitive positions based on comparisons with major market players, which is critical in the highly dynamic pharmaceutical industry. As a result, the integration of this model into the management processes of pharmaceutical companies contributed to the achievement of strategic goals increasing competitiveness and ensuring sustainable development at the national and international levels.

Further research could assess the impact of specific digital marketing tools on the performance of pharmaceutical companies, as well as explore opportunities to expand cooperation with international partners. This will determine the industry's development prospects in greater detail and find new ways to adapt to rapid changes in the global business environment.

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Conflict of Interest

None.

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Особливості маркетингу на міжнародному фармацевтичному ринку в умовах цифрової трансформації

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Анотація. Фармацевтичний ринок виконує ключову функцію забезпечення населення ліками, де маркетинг виступає рушійною силою задоволення потреб у якісному медичному забезпеченні та потребує інноваційних підходів. Актуальність роботи полягала у тому, що технологічні інновації разом із складною епідеміологічною ситуацією в світі та війною в Україні змінили вимоги до комплексу маркетингу на фармацевтичному ринку, сфері охорони здоров'я. Метою дослідження було поглиблення теоретичних положень та розробка науково-практичних рекомендацій щодо впровадження маркетингових інновацій на міжнародному фармацевтичному ринку для підвищення ефективності, покращення і пришвидшення доступу населення до інноваційних медичних препаратів. Методологічною базою стали порівняльний, кількісний методи, табличний аналіз та синтез. В статті визначено роль маркетингового інструментарію та механізму маркетингового управління на міжнародному фармацевтичному ринку. В ході дослідження було проаналізовано виклики, що виникають перед учасниками міжнародного фармацевтичного ринку, пов'язані з глобалізацією, та визначають ключові аспекти міжнародного маркетингу, які впливають на успішність управління фармринком. У статті розглянуто необхідність адаптації маркетингових стратегій до різноманітних культур та економічних умов, що властиві різним країнам. Проаналізовано ефективні методи просування на міжнародних фармацевтичних ринках, вивчено важливі аспекти брендингу та комунікації для забезпечення успіху управління в фармсфері. Було досліджено сучасні тенденції міжнародного маркетингу в фармсфері та визначено стратегії адаптації до змін у глобальному економічному середовищі. Було визначено роль ефективного маркетингового управління у створенні конкурентних переваг на міжнародних ринках, звертаючи увагу на підвищення якості обслуговування клієнтів. В статті запропоновано структурно-логічну модель формування маркетингової стратегії розвитку бізнес-суб'єктів фармацевтичного ринку в глобальному економічному просторі, зосереджуючись на їх розвитку у міжнародному економічному просторі. Було вивчено виклики, з якими стикаються фармацевтичні компанії, визначають ключові аспекти міжнародного маркетингу, спрямовані на ефективне позиціонування на світовому ринку. Практична цінність роботи полягає у розробці структурно-логічної моделі формування маркетингової стратегії для бізнес-суб'єктів фармацевтичного ринку, що сприятиме їх успішному позиціонуванню на міжнародних ринках та підвищенню ефективності доступу населення до інноваційних медичних препаратів

Ключові слова: цифрові технології; інноваційні підходи; конкурентоспроможність; комунікаційні інструменти; стратегія просування; клієнтоорієнтованість; адаптація бізнес-моделей