Health Technology Assessment in Saudi Arabia – Expectations for Oncology Product Eligibility Based on Predicate Canadian HTA

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Poster: **HTA89**

FIECON a Herspiegel company

Background

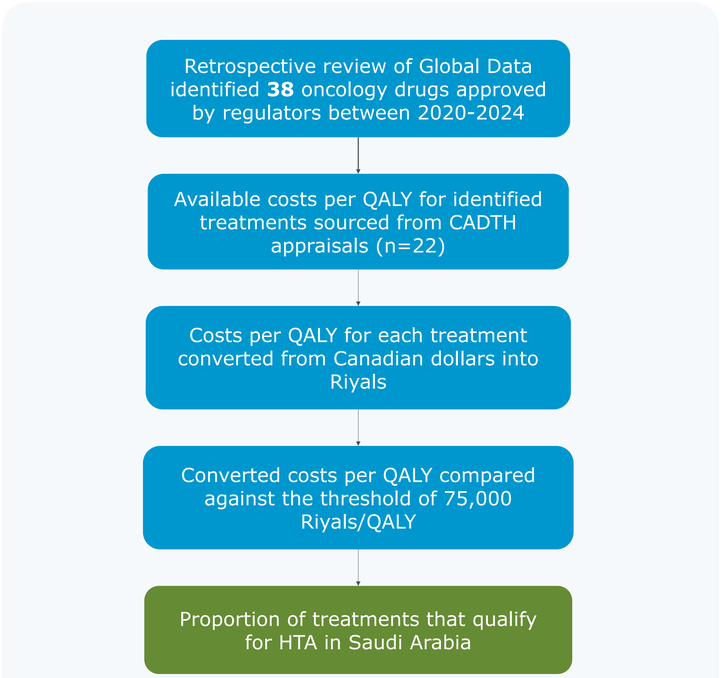
Vision 2030 is the Kingdom of Saudi Arabia's plan to diversify the country economically, socially, and culturally. Lifesciences is center stage in this evolution with a vibrant pharmaceutical and provider environment. Concerning new pharma product launch, a Health Technology Assessment (HTA) process has been proposed for all new pharmaceutical products exceeding 75,000 Riyals per quality adjusted life year (QALY) gained. With Saudi Arabia being an attractive market for pharmaceutical companies, it is crucial to plan for success.

Objective

To assess what proportion of new oncology product launches in Saudi Arabia will potentially qualify for HTA based on cost per QALY inclusion criteria.

Methods

Figure 1: Flow diagram of research strategy



Canadian Agency for Drugs and Technologies in Health (CADTH) was chosen as the comparable assessment framework due to list prices in Canada bearing affinity to those in Saudi Arabia. List prices in the United States can be nearly three times higher in comparison to other countries.[1]

Results

Out of the 22 new oncology products evaluated by CADTH between 2020 and 2024, 100% (22/22) would have breached the 75,000 Riyals/QALY threshold and qualified for HTA assessment in the Kingdom of Saudi Arabia (**Figure 2**).

Most products are *significantly (3-4x)* above the threshold, indicating that preparation for formal value appraisal would be key for patient access even at highly elevated levels.

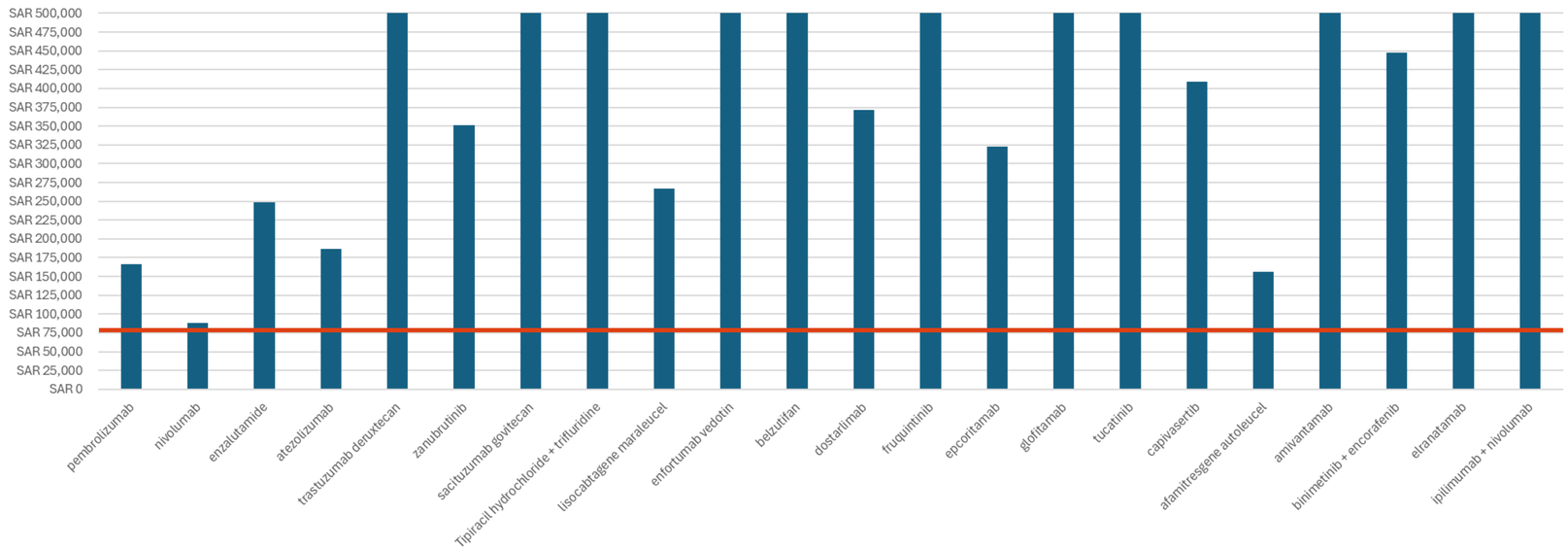
Undetermined at this point is that new level, the threshold of which will be set for specialty therapeutics in SAR at some point in the future and is anticipated to be significantly higher than the present 75,000 Riyals/QALY threshold.

As the formal HTA process is unveiled via Vision 2030, a reassessment of these hematology and oncology launch products will be necessary to prepare for future submissions and value appraisal for innovative medicines.

رؤية VISION 2030 المملكة العربية السعودية KINGDOM OF SAUDI ARABIA

Exhibit 1: *In 2026, Vision 2030 will enter its third and final phase of delivery: a new chapter focused on entering full delivery mode, expanding opportunity across every sector, and sustaining the impact well beyond 2030*

Figure 2: Treatments that would qualify for HTA in Saudi Arabia (oncology and hematology product launches, 2020-2024, n=22)



Conclusion

These findings underscore the importance of manufacturer preparation for the emergent HTA process in Saudi Arabia. Products with high list prices (e.g. oncology, rare disease, specialty) will require special consideration, absent a QALY threshold modifier for specialty therapeutics (which has not been announced to date).

Historically, product launch prices have been higher in Saudi Arabia than in Canada, as per the Medicine Price Index[2], which is a further impetus for preparing for a formal value appraisal process slated for ~2026.

Early recognition of opportunities and understanding of the HTA process are essential for successful market access strategies in this critical commercial market.

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Sources: 1. Comparing Prescription Drugs in the U.S. and Other Countries: Prices and Availability. ASPE. 2024. 2. 2019 Medicine Price Index. Medbelle. 2019.

Abbreviations: CADTH – Canadian Agency for Drugs and Technologies in Health; HTA – Health technology assessment**;** QALY – Quality-adjusted life year