

# Germany: Still a Benchmark for ATMP Access and Pricing? A Pricing Analysis of Germany's ATMP Landscape Compared to Other European Countries

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## Objectives

This poster explores how German ATMP prices compare to those in other major European markets. The aim was to analyse changes in the pricing strategy of ATMPs in relation to the addressed population sizes and granted added benefit in Germany from the payer's perspective, as well as to compare launch- and ex-factory prices with other European countries such as France, Ireland, Netherlands and UK.

## Methods

A comparative data analysis of the German list prices was conducted for all ATMPs after successful price negotiations based on the Lauer Taxe and a proprietary AMNOG database, including a peer group analysis based on several factors such as population size or granted added benefit. Afterwards, the findings were compared with the prices in other European countries. If no rebated prices were available for the other countries, ex-factory prices were compared.

## Results

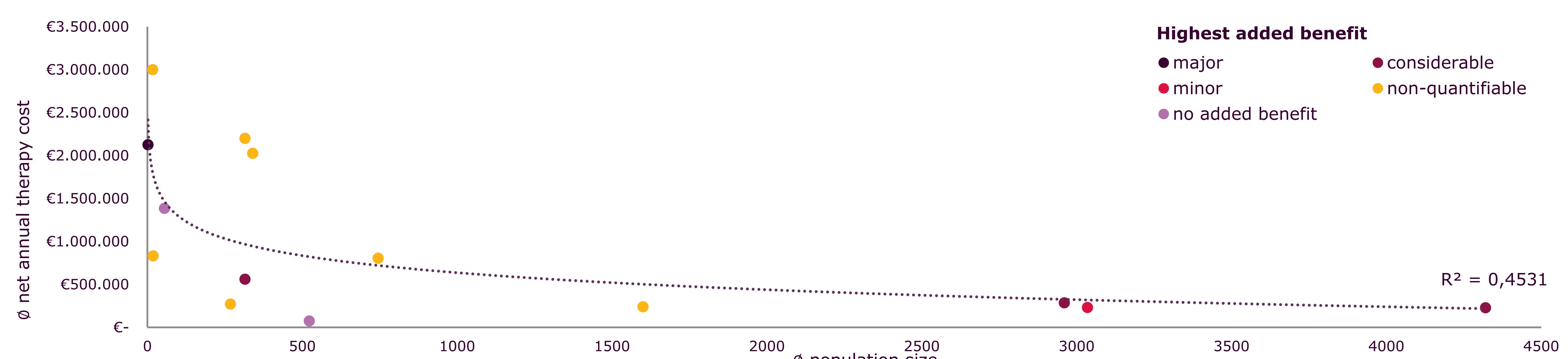
**Table 1: Launch and current ex-factory prices of 7 different ATMPs in different European countries (launch dates included).**

Ex-factory launch price levels were similar between Germany, Ireland, France and the Netherlands, with some exceptions in the UK, where (adjusted) price levels were in some cases higher than average. The fewest number of ATMPs is available to patients in Ireland. Current ex-factory prices are not available for every country. The Ex-factory prices and actual reimbursement amounts of the ATMPs may greatly differ in each country due to confidential rebates.

Product	Germany		France		Italy		Spain		UK		Ireland		Belgium	
	Launch price	Current price	Launch price	Current Price	Launch price	Current Price	Launch price	Current Price	Launch price	Current Price	Launch price	Current Price	Launch price	Current Price
Eladocagene exuparvovec (UPSTAZA)	3,000,000.00 € (01-Apr-2024)	3,000,000.00 €	3,500,000.00 € (26-Jan-2023)	3,500,000.00 €	3,500,000.00 € (05-Dec-2023)	3,500,000.00 €	-	-	3,459,633.25 € (20-Feb-2023)	3,459,633.25 €	-	-	3,500,000.00 € (01-Jan-2024)	3,500,000.00 €
Atidarsagene autotemcel (LIBMELDY)	2,875,000.00 € (01-May-2021)	2,125,000.00 €	2,875,000.00 € (01-Sep-2023)	2,875,000.00 €	2,890,075.45 € (05-Jul-2021)	2,594,687.50 €	2,875,000.00 €	-	3,303,971.93 € (09-Feb-2022)	3,303,971.93 €	-	-	-	-
Tabelecluseucel (EBVALLO)*	75,000.00 € (15-May-2023)	55,444.45 €	75,000.00 € (05-Jul-2025)	75,000.00 €	67,687.50 € (14-Mar-2025)	67,687.50 €	-	-	-	-	-	-	75,000.00 € (01-Aug-2024)	75,000.00 €
Ciltacabtagene autoleucel (CARVYKTI)	420,000.00 € (15-Feb-2023)	285,000.00 €	420,000.00 € (01-Sep-2023)	420,000.00 €	-	-	420,000.00 € (15-Apr-2025)	420,000.00 €	435,525.56 € (28-Jan-2025)	435,525.56 €	-	-	399,000.00 € (01-May-2025)	399,000.00 €
Lisocabtagene maraleucel (BREYANZI)	345,000.00 € (01-Sep-2022)	227,500.00 €	345,000.00 € (26-Jan-2023)	-	311,362.50 € (09-Feb-2024)	311,362.50 €	-	-	341,314.67 € (25-Mar-2025)	341,314.67 €	-	-	-	-
Axicabtagene ciloleucel (YESCARTA)	327,000.00 € (01-Nov-2018)	230,621.00 €	350,000.00 € (30-Jul-2018)	-	327,000.00 € (12-Nov-2019)	295,117.50 €	327,000.00 € (15-Jul-2019)	327,000.00 €	322,296.43 € (30-Nov-2018)	322,296.43 €	315,564.62 €	-	287,000.00 € (01-Jun-2021)	320,000.00 €
Tisagenlecleucel (KYMRIAH)	320,000.00 € (15-Sep-2018)	239,000.00 €	-	-	320,000.00 € (13-Aug-2019)	288,800.00 €	320,000.00 € (12-Feb-2019)	320,000.00 €	324,076.55 € (19-Feb-2020)	324,076.55 €	307,353.21 € (01-Mar-2024)	301,944.37 €	320,000.00 € (01-Aug-2019)	267,200.00 €

Calculation of UK prices in Euro based on the currency exchange rate of 1.149208 (15-Oct-2025). Prices not listed or products not launched in the respective country were marked with "-".

\* Price per vial



**Figure 1: Average annual therapy cost of ATMPs which are currently reimbursed in Germany in relation to the addressed population size.**

The net prices of the 14 ATMPs that underwent the AMNOG process and still hold their marketing authorisation ranged between ~€30,000 up to €3,000,000 with an average of €551,557.57. In general, the net prices were lower for ATMPs with several indication extensions and therefore higher total target populations. Net prices after negotiation also correlate with the grade of the granted added benefit with rebates ranging from ~3.55% up to 52.4% with a mean rebate of 16.4%.

## Conclusion

Based on the payer decisions and AMNOG precedents on ATMPs, there is no clear trend or change on pricing decisions. Comparisons with other EU countries show that Germany is still a leading price anchor for ATMPs and often used for reference pricing at the initial launch. However, comparisons in current price levels of selected ATMPs show that the price levels seem to have a higher fall off in Germany compared to other European countries. To further assess the differences in post-launch prices and the influence of German ATMP pricing, country-specific confidential rebates would be needed to compare actual costs of the drugs.

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### References:

- Proprietary AMNOG Database – Market Access Intelligence System (MAIS) by Kintiga
- Belgian Institut national d'assurance maladie-invalidité (INAMI)
- French National Health Insurance Agency (CNAM)
- Dictionary of Medicines and Devices - National Health Service (NHS)
- Spain's General Council of Official Colleges of Pharmacists
- Primary Care Reimbursement Service (PCRS) of the Health Service Executive (HSE)
- Italian CODIFA / Gazzetta Ufficiale

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