

# Generic Penetration in the Market for Antidiabetics, Lipid Modifying Agents and Psychoeleptics/Psychoanaleptics: A Comparative Analysis of Data From 18 European Markets

Giannakopoulou A.<sup>1</sup>, Nomikos N.<sup>2</sup>, Karampli E.<sup>3</sup>, Athanasakis K.<sup>4</sup>

<sup>1</sup>Department of Public Health Policy, School of Public Health, University of West Attica, Athens, Greece

<sup>2</sup> PhD candidate, Laboratory for Health Technology Assessment, Department of Public Health Policy, School of Public Health, University of West Attica, Athens, Greece

<sup>3</sup> Laboratory Teaching Staff (EDIP), Laboratory for Health Technology Assessment, Department of Public Health Policy, School of Public Health, University of West Attica, Athens, Greece

<sup>4</sup> Assistant Professor, Laboratory for Health Technology Assessment, Department of Public Health Policy, School of Public Health, University of West Attica, Athens, Greece

## Introduction and Objectives

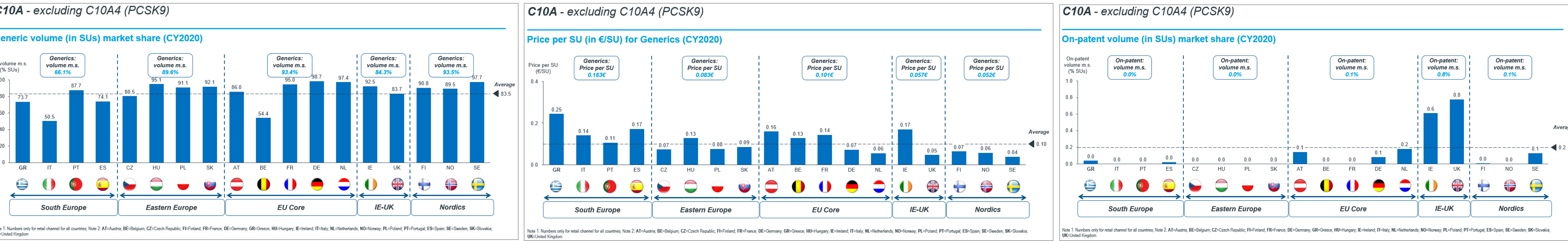
The aim of the present analysis is to investigate generic penetration in European countries, focusing on selected groups of medicines.

## Methods

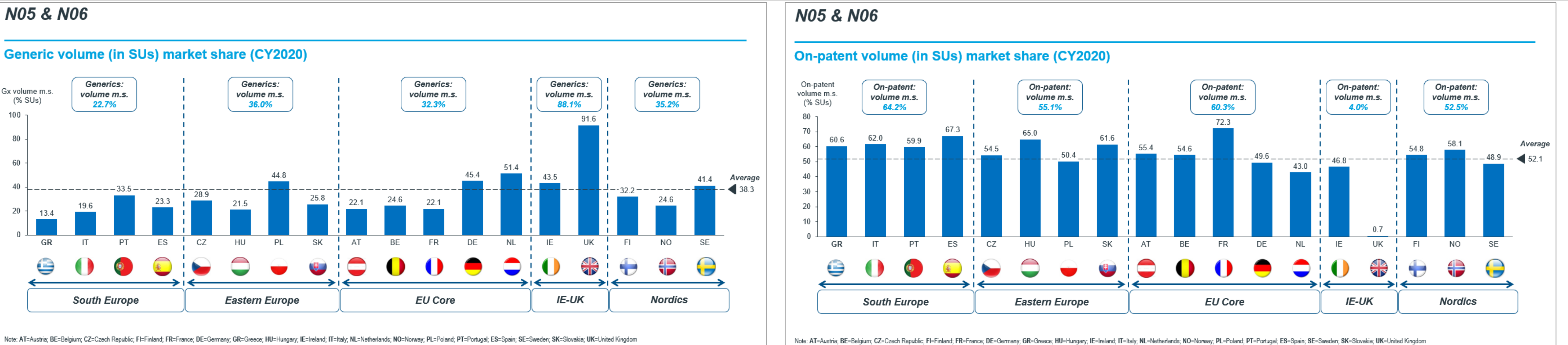
Market shares for on-patent, off patent and generics (Gx) medicines were calculated for 18 European countries, using IQVIA Midas data from 2020. Data were received at package level and for the volume shares calculation, all packages were converted to Standard Units (Sus). For Value shares calculation, ex-factory price of each package was used. Anatomical Therapeutic Chemical (ATC) groups in scope were C10A – Lipid Modifying Agents, Plain (excluding ATC C10A4); N05/N06 Psychoeleptics/Psychoanaleptics; and A10 Drugs used in Diabetes (excluding insulin). Data reflect sell-out retail channel for prescription drugs. The 18 European Countries were selected due to the comparability of data (retail channel - sell out data). Countries in scope were: “South Europe”- Greece, Italy, Portugal, Spain, “Eastern Europe” - Czech Republic, Hungary, Poland, Slovakia, “EU Core”- Austria, Belgium, France, Germany, Netherlands, “IE-UK” – Ireland, United Kingdom and “Nordics” – Finland, Norway, Sweden.

## Results

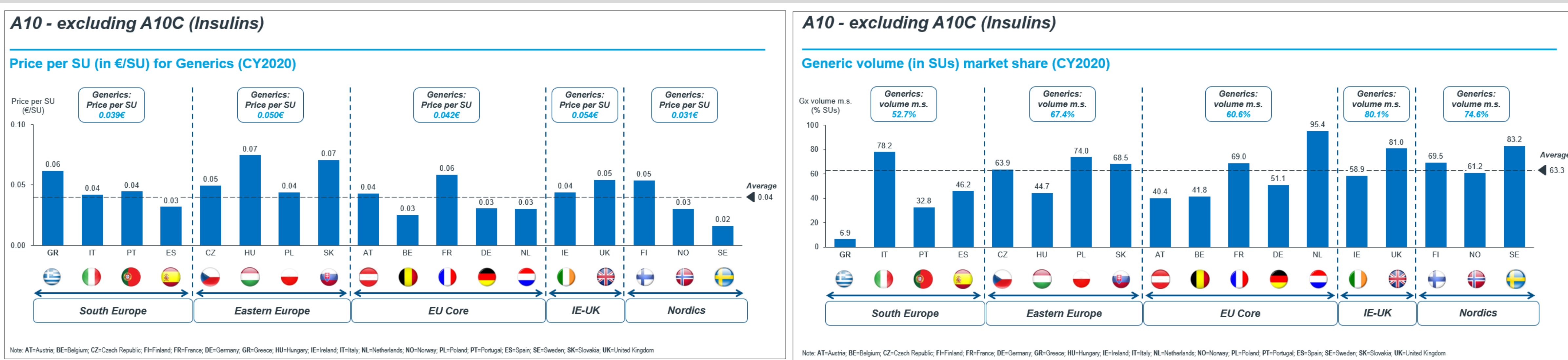
**Lipid Modifying Agents:** Gx penetration in this ATC is high (average 83.5%), which can be explained by the absence of on-patent drugs. However, there are countries performing lower than EU18 average with the lowest share reported in Italy (50.5%) and Belgium (54.5%). Germany and Sweden present the highest Gx volume shares (98.7% and 97.7% respectively). Regarding Gx prices, it is noted that all Countries performing lower than EU18 average, show a higher Gx price per SU than EU18 average. Greece is an outlier, with average Gx price per SU in this Category, 2.5 times higher than the calculated average price per Gx SU.



**Psychoeleptics/Psychoanaleptics:** on-patent medicines are dominant in this ATC with an average volume share of 52.1%. Gx penetration average in terms of volume share is 38.3%; the lowest Gx share is observed in Greece (13.4%). UK is an outlier, with a Gx volume share of 91.6% in this ATC group. The Netherlands and Germany are also high performing countries (51.4% and 45.4% Gx volume share respectively).



**Drugs used in Diabetes:** the average market share of Gx medicines in terms of volume in this group is 63.3%. The highest volume shares are observed in the Netherlands (95.4%) followed by Sweden (83.2%). Greece is an outlier, with a significant low Gx volume share (6.9%), followed by Portugal (32.8%). We see no evident price - share correlation in this category, since from all Countries were Gx price/SU was higher than EU18 average, only Greece and Hungary present a a lower than the average Gx penetration.



## Conclusions

The Netherlands, Sweden and Poland, are the only Countries presenting a higher than EU18 average Gx penetration in all 3 ATC groups in scope. Greece and Spain are the only Countries performing lower than EU18 average in all 3 ATC groups. There is significant variability in Gx penetration in the ATC groups included in the analysis. Also, Volume & Value shares differ within the same Country for the same ATC group. High performing countries could provide useful lessons for countries with low Gx volume share such as Greece.

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