



European Federation of Pharmaceutical  
Industries and Associations

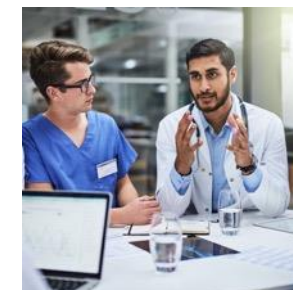


# Finding solutions for better access to novel medicines in Europe

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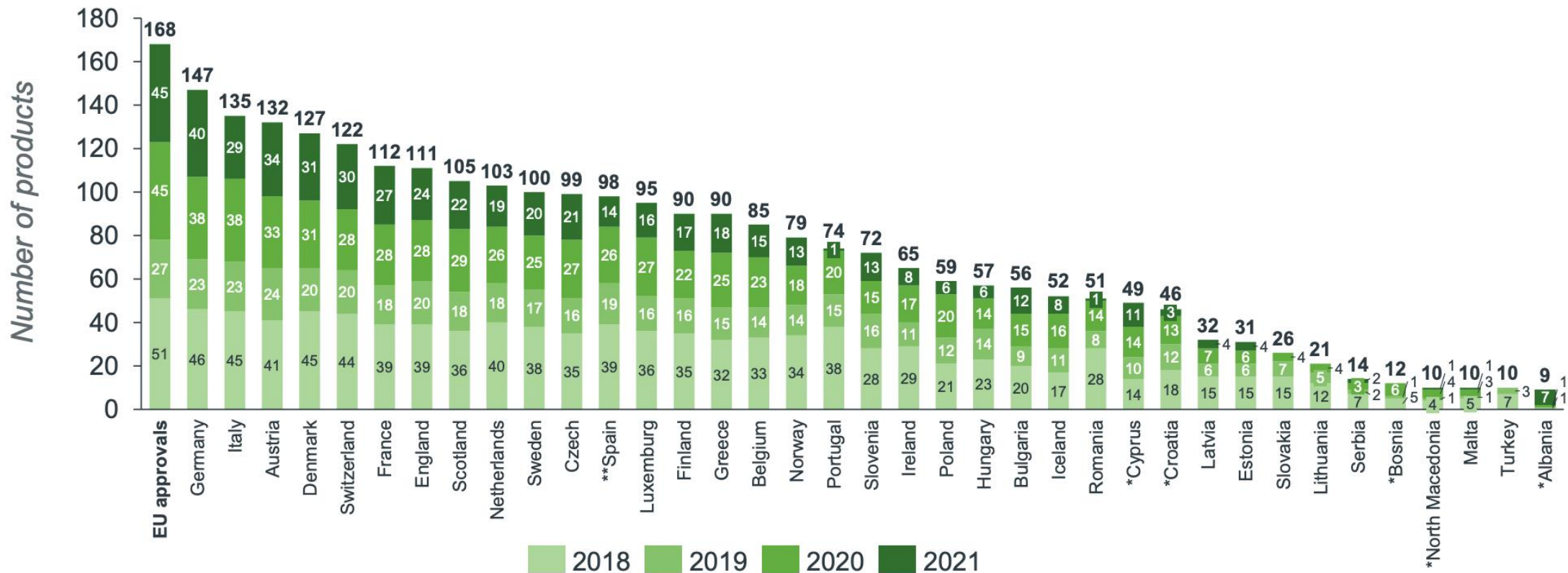


Presentation  
ISPOR Europe 2023



# What's the problem? Unequal availability and speed of access to medicines across Europe

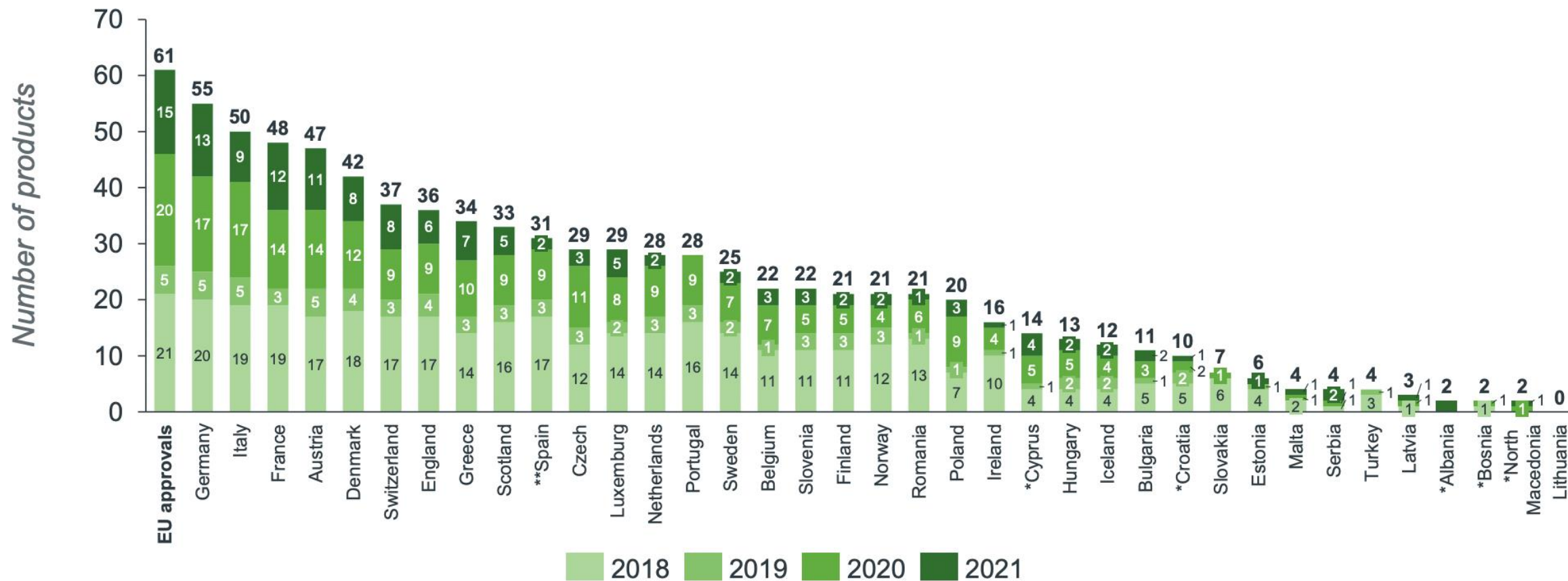
The **total availability by approval year** is the number of medicines available to patients in European countries as of 5<sup>th</sup> January 2023 (for most countries this is the point at which the product gains access to the reimbursement list<sup>†</sup>), split by the year the product received marketing authorisation in Europe.



European Union average: 76 products available (45%) <sup>†</sup>In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. Country-specific nuances are listed in the appendix. \*Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. \*\*In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

# Similar picture for orphan medicines (but with some countries changing place)

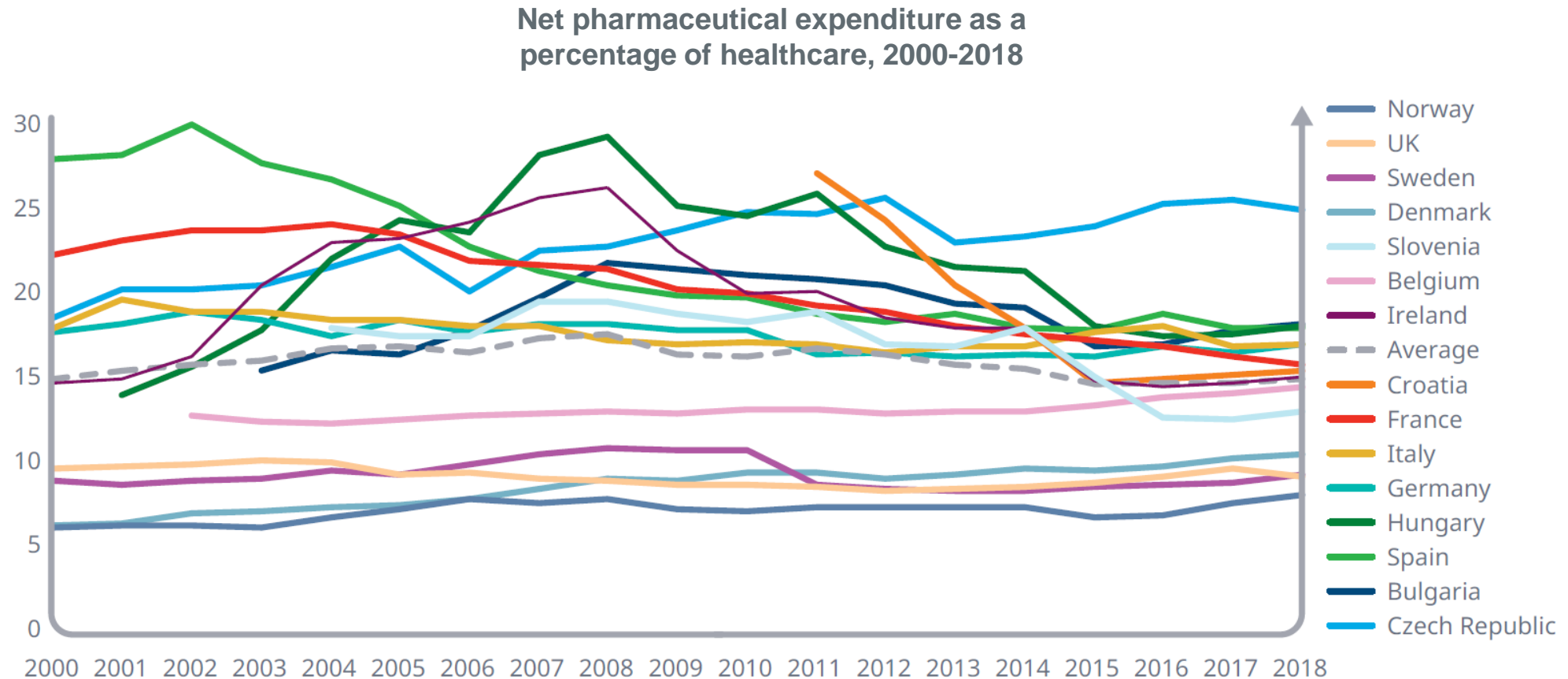
The **total availability by approval year** is the number of medicines available to patients in European countries as of 5<sup>th</sup> January 2023 (for most countries this is the point at which the product gains access to the reimbursement list<sup>†</sup>), split by the year the product received marketing authorisation in Europe.



European Union average: 24 products available (39%)<sup>†</sup> In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme.  
<sup>†</sup>Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. <sup>\*\*</sup>In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

# Why? Higher prices for some segments (e.g. orphans, cell and gene therapies) but total pharmaceutical expenditure has remained ~15% of healthcare expenditure since 2000

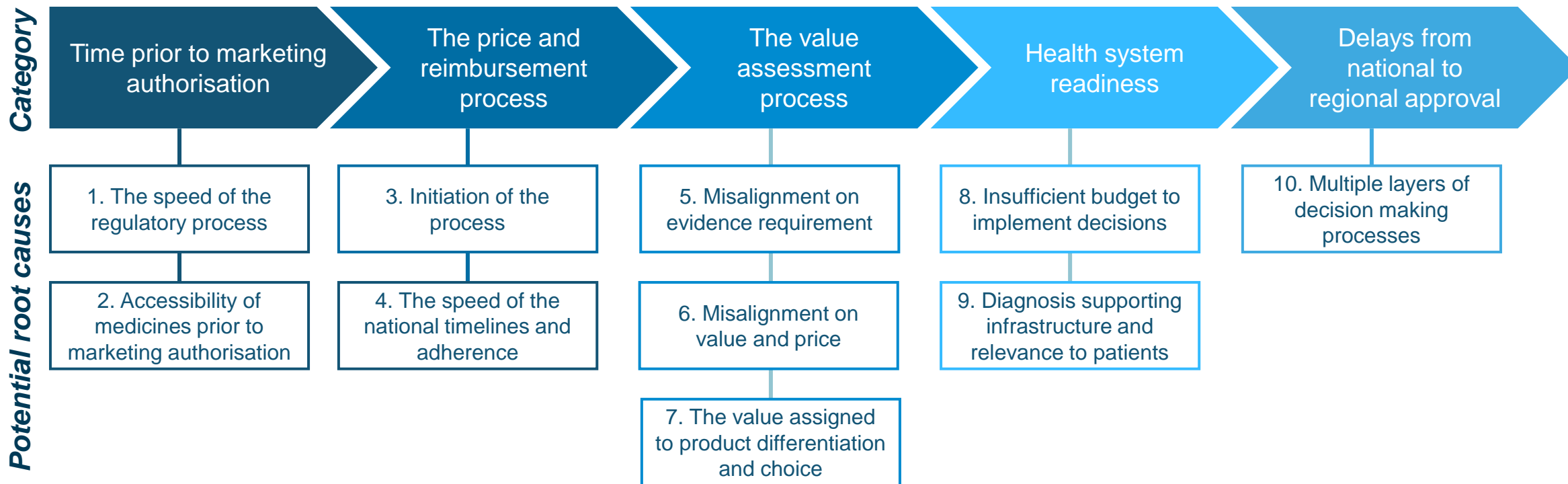
*Countries' net pharmaceutical spending has been converging over the past 20 years*



Source: World Health Organization (WHO), 2018 (extracted on 18 November 2021), WHO SHE 1.0 data (extracted on 18 November 2021); OECD, 2019 (extracted on 18 November 2021).

Notes: Drug spending includes medicines dispensed in both retail and non-retail sectors. Methods for estimating total drug spending on a net basis are detailed in the methodology appendix. Health spending from WHO database. Both the drug and health spend data were adjusted for population, Purchasing Power Parity (PPP) and GDP growth to represent in 2020 values.

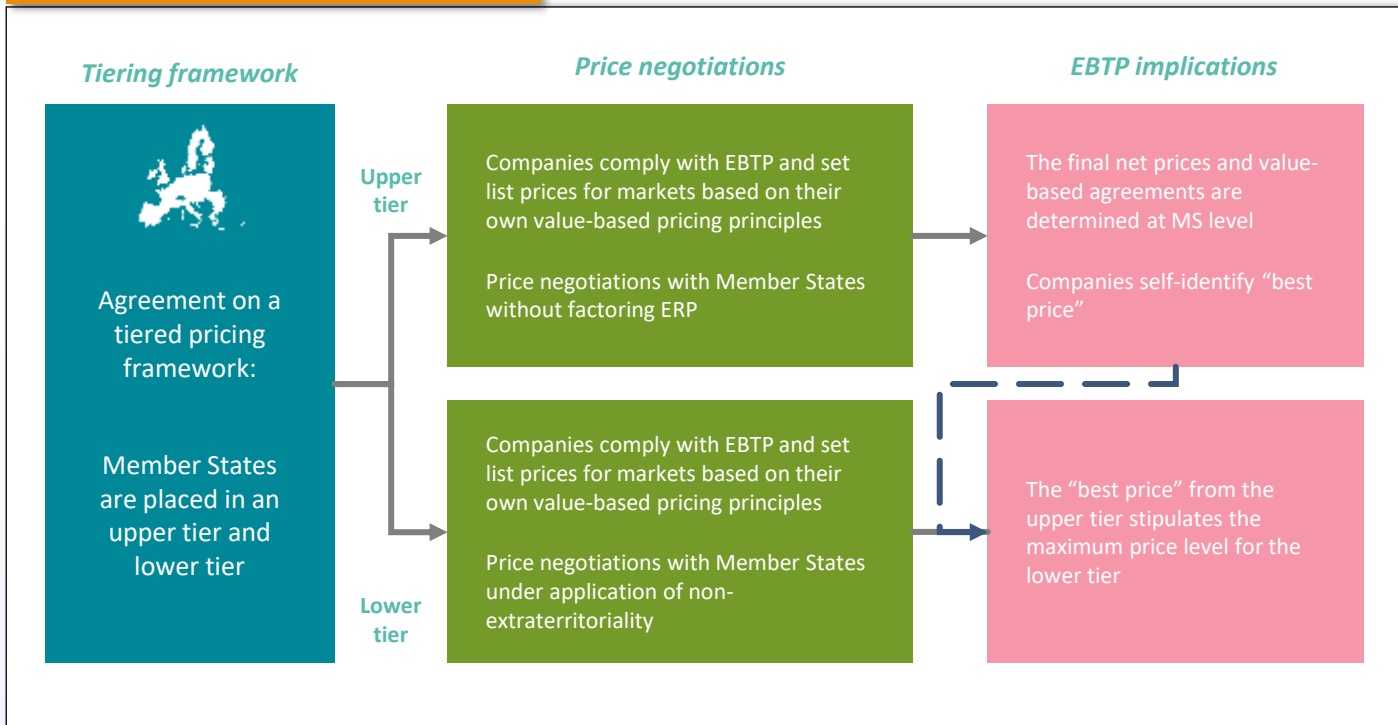
# So what are the root causes of unavailability or access delays in Europe?



Several tools needed to address different barriers to patient access!

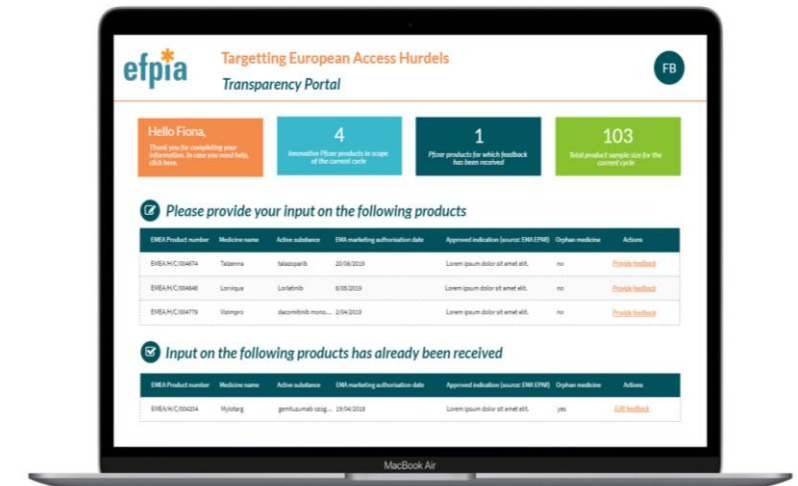
# Strong commitment from industry to improve patient access to treatment

## Equity Based Tiered Pricing



## EFPIA's Access Portal

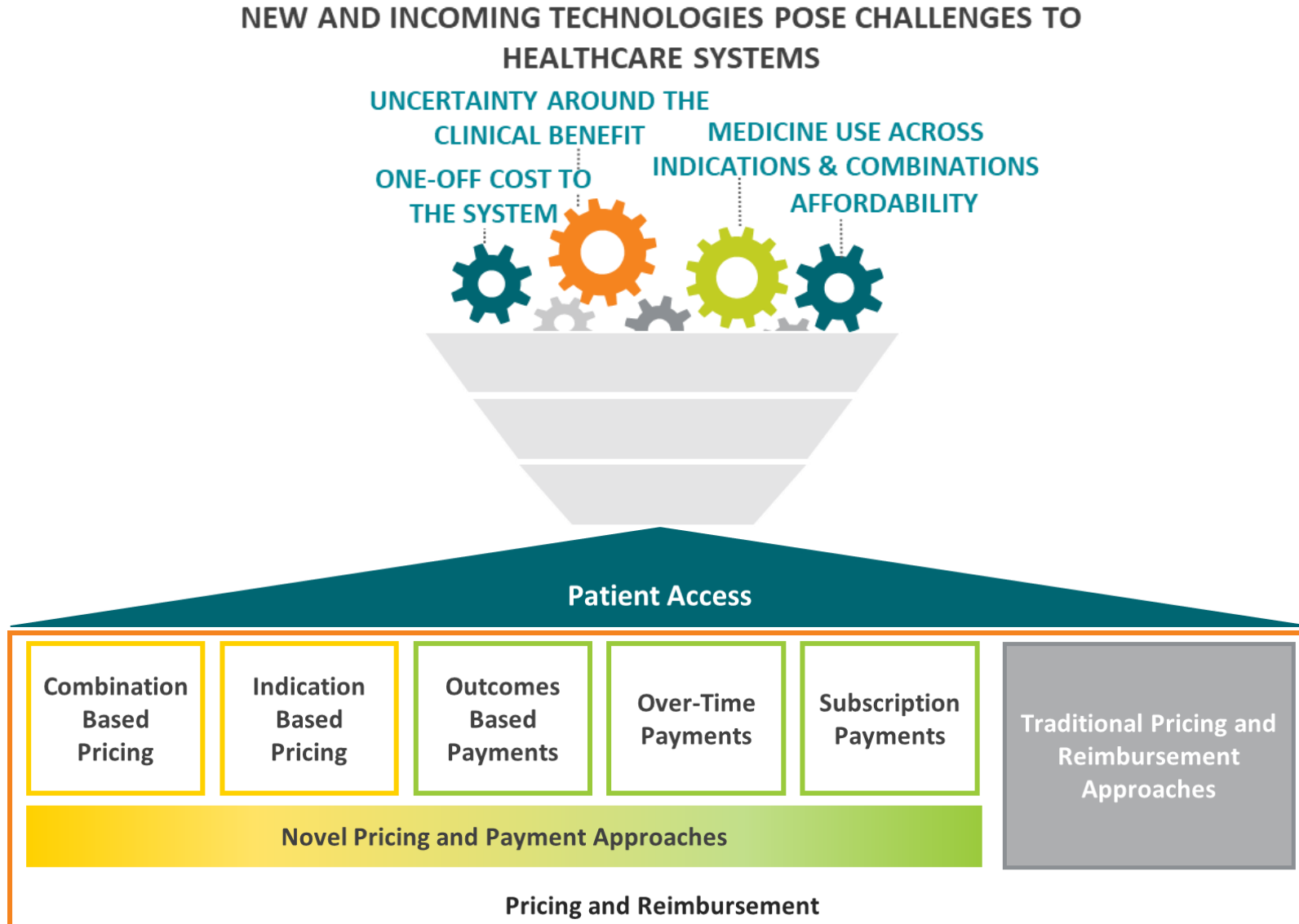
The Portal **tracks patient access** to newly launched medicines across European markets and highlights root causes behind access delays



## Commitment to File

Industry commits to **filing of P&R applications** post EU authorisation in all EU-27 Member States as soon as possible and no later than two years, provided that local systems allow it

# Novel pricing and payment models can solve challenges to provide early access to innovative therapies – but require the right legal and data collection framework



# Can information about and data from Novel Payment Models be made more available? - EFPIA principles



# We are on the right path, but further progress is needed – industry stands ready to partner with the stakeholder community





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Thank you

