PDCI MARKET ACCESS

HPR17

2023

PDCI's Biopharmaceutical Ecosystem Index: Where does Canada Rank on its Attractiveness for New Medicine Launch?

Abunassar C, Fleming M, Loschmann C, Scott V, Burt M, Dowson JP

Background: Recent literature shows Canada receiving fewer or delayed new medicine launches in recent years versus comparator countries.[1-3]

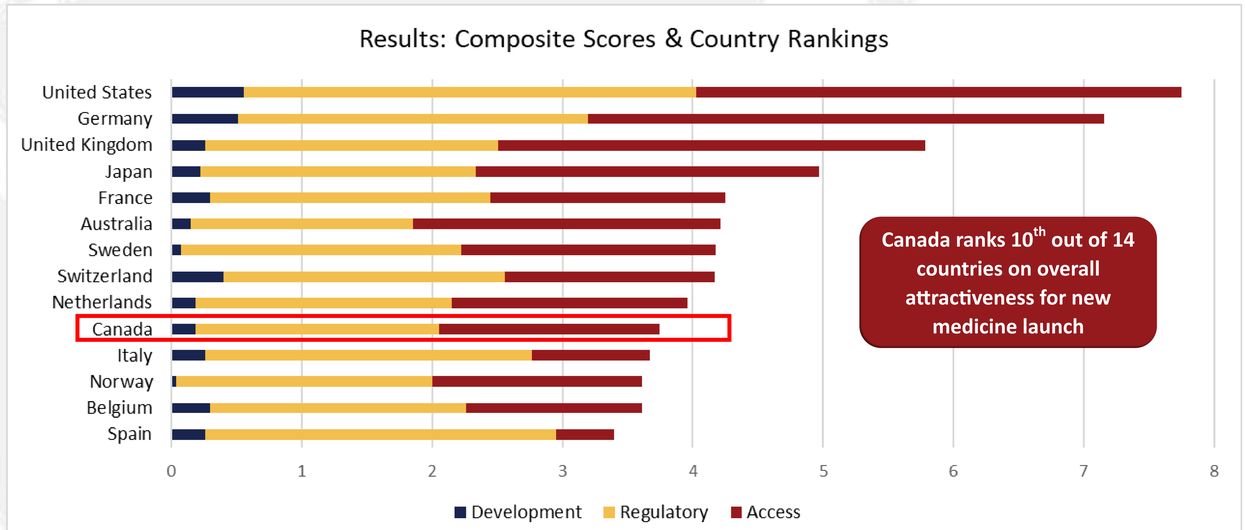
Objective: The objective of PDCI's Biopharmaceutical Ecosystem Index (the Index) is to rank 14 countries on their relative attractiveness for new medicine launch.

Methods: Recognizing that global pharmaceutical manufacturers' decisions on whether and when to launch a new medicine in a country are complex and multifactorial, Index authors convened an independent Editorial Advisory Board[4], composed of biopharmaceutical experts and experts on pharmaceutical policy and patient access issues to identify and weight indicators and measurements that commonly influence a global biopharmaceutical decision-maker's perspective of a country's launch attractiveness.

Following an extensive literature review on each measurement, authors scored each country on eight indicators under three technical areas: Development & Commercialization Infrastructure, Regulatory Landscape and Access Environment. Authors then weighted the scores on each indicator to produce a composite attractiveness score for each country.

Technical Area	Indicator	Weight	Measurement
Development & Commercialization Infrastructure	Late-Stage R&D Activity	.038	. Number of Phase 3 Clinical Trials Registered (2020)
	Manufacturing Capability	.036	. $ Value of Pharmaceutical Industry Exports (2019)
Regulatory Landscape	Intellectual Property Protection	.122	. Years of standard patent life . Years of patent term restoration . Years of data protection . Other IP Incentives
	Market Authorization Process	.102	. Standard and prioritized review time (targets and actual 2019) . Existence of specialized and/or prioritized review pathways . Existence of a rolling review pathway
	Price Regulation	.180	. Influence of price regulator . Resulting average prices
Access Environment	Market Potential	.112	. Share of global pharmaceutical market . Wealth (GDP/Capita) . Share of out-of-pocket spending
	HTA & Reimbursement	.346	. Time to reimbursement from market authorization . Existence of sizeable private market . Complexity: Number of payers/processes . Mechanism for HTA concurrent with regulatory or reimbursement
	Patient Role	.064	. Impact of patient participation in HTA
	Total	1.000	

Results: Canada ranks 10th out of 14 countries on its attractiveness for new medicine launch, putting it ahead of Italy, Norway, Belgium, and Spain which ranked 11th to 14th, respectively. Canada trailed the other countries in the analysis, which were (in order of overall attractiveness ranking, from first to ninth): the United States, Germany, United Kingdom, Japan, France, Australia, Sweden, Switzerland and Netherlands.



Conclusion: This study was conducted to better understand the potential underlying reasons for fewer or delayed Canadian launches of new medicines in recent years, and to shed light on which indicators or policies can have the greatest impact on Canada's attractiveness for new medicine launches. The goal is to help Canadian policy makers and biopharmaceutical leaders engage in constructive dialogue towards creating the best possible system for Canadian patients to access new innovative medicines in the years to come.

Scan the QR code to download the full report for more results and solutions to improve Canada's launch attractiveness ranking.

1. Barua B, Westcott W, Van Nghiem V. Timely Access to New Pharmaceuticals in Canada, the United States, and the European Union. 2021.
2. Shajarizadeh A, Hollis A. Delays in the submission of new drugs in Canada. Canadian Medical Association Journal. 2015;187(1):E47-E51. doi:10.1503/cmaj.130814
3. Centre for Innovation in Regulatory Science. New drug approvals in six major authorities 2010-2019: Focus on Facilitated Regulatory Pathways and Internationalisation. 2020.
4. Editorial Advisory Board: Wayne Critchley, Senior Associate at Global Public Affairs' Health & Life Sciences practice, Martine Elias, Executive Director at Myeloma Canada, Brian Jahns, Chief Business Officer at Entheon Biomedical Corp., Danielle Peters, President of Magnet Strategy Group, Nigel Rawson, Senior Fellow with the Macdonald-Laurier Institute, Affiliate Scholar at Canadian Health Policy Institute and Senior Fellow with the Fraser Institute, Jared Rhines, Vice President/General Manager, BioCryst Canada, Victoria Vertesi, Vice President, Biopharma Solutions, McKesson Canada