MARKET ACCESS IN UKRAINE:
WHAT ARE THE DRIVERS AND CHALLENGES?

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Ukraine country profile

Total pharmaceutical expenditures on medicines (private and public) in 2017:

- EUR 2.24 bn
- 2.34% of GDP (BMI Research)
- 15% of public financing for medicines

International organizations (UN agencies – the United Nations Development Program, the United Nations Children’s Fund and Crown Agents) purchase medicines and medical devices for 40 national programs for a total of EUR 0.19 bn.
### Public pharmaceutical providing in Ukraine

<table>
<thead>
<tr>
<th>Level of procurement</th>
<th>Current procurement method</th>
<th>Pharmaceutical providing</th>
<th>Levels of price and volume controls</th>
<th>2017/2018 UAH bn</th>
<th>2017/2018 USD mln</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>By International agencies UNDP, UNICEF and Crown agents</td>
<td>487 medicines (259 INNs) for 41 disease programs</td>
<td>No HTA submission for inclusion in programs</td>
<td>5,9</td>
<td>210</td>
</tr>
<tr>
<td>Regional/ Hospitals</td>
<td>National tendering following procurements by regions and hospitals</td>
<td>427 INNs in regulatory list - EML, secondary &amp; tertiary medicines</td>
<td><strong>HTA</strong> for inclusion on EML, Expert committee analysis, tendering</td>
<td>4,8</td>
<td>171</td>
</tr>
<tr>
<td>Primary care</td>
<td>Reimbursement program “Affordable medicines”</td>
<td>23 INNs from EML, primary care/ outpatients</td>
<td><strong>HTA</strong> external reference pricing, budget cap</td>
<td>1</td>
<td>36</td>
</tr>
<tr>
<td>Total, values</td>
<td></td>
<td></td>
<td></td>
<td>11,7</td>
<td>418</td>
</tr>
</tbody>
</table>
Expert Committee of Ministry of Health of Ukraine

- Since 2016 conduct HTA for medicines
- Develop model of priority diseases
- There is legislation framework
- HTA based on clinical and economic analysis (CEA, BIA)
- Publicly available recommendations based on assessment of submissions
- EUnetHTA member since 2018
- Developed and published HTA guidelines in Ukraine in 2018
- Next step - creation of HTA agency

Market access environment, strategic plan, and how to optimize access and value of medicines?

- The Accounting Chamber of Ukraine recorded cost saving up to 39% in 2017 as a result of this engagement with international procurement organizations
- Rapid marketing authorization (up to 10 days for medicines procured via international organizations)
- Mandatory HTA for inclusion on EML by Expert Committee of MoH
- EML for regional procurement and reimbursement
- Regional national tendering purchased for EUR 0.16 bn using EML
- Reimbursement program “Affordable medicines” was EUR 23.3 mn by State Budget funding in 2017
- ERP is used for reimbursement program
- Establishment of Central procurement organization (October 2018)
Conclusions and future directions

- Efficient procurement in Ukraine needs to be activated in a synergistic manner based on the international practice: pharmaceutical policy, legislation, stakeholder collaboration and involves more than just obtaining the lowest price – it is about creating a healthy market where high-quality products are available at the right time at affordable prices and at the right quantity.
- Additional instruments can be used to improve efficiency: using of generics/biosimilars, creating a competitive market through therapeutic tenders.
Conclusions and future directions

- Develop new reimbursement and price reference models.
- Consider co-payments based on patient characteristics and socioeconomic status, referencing of the SKU.
- Integration HTA for all levels of public procurement.
- Define processes between CPA and HTA.
- Perspective European scientific and technical cooperation!

Thank You for attention!