ACCESS TO MEDICINES
IN THE OFF-PATENT SECTOR

Medicines for Europe - EPF Dialogue
MEDICINES FOR EUROPE
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Medicines for Europe Vision 2020
Our 5 pillars

- PATIENTS
- QUALITY
- VALUE
- SUSTAINABILITY
- PARTNERSHIP
Generic Medicines
A Cornerstone of Healthcare Sustainability

**KEY FIGURES ON GENERIC MEDICINES**

- **56%** of dispensed medicines
- **22%** of pharmaceutical expenditures
- **€100BN** less spending through generic competition
- **+350** manufacturing sites in the EU
- **High quality medicines to over 500 millions patients**
- **+100%** patient access over 10 years
- **Up to 17%** R&D investment of turnover

Cardiovascular | Hypertension
Diabetes | Depression
Epilepsy | Mental disorder
Gastro-intestinal

**+160,000 employees**
Still considerable opportunities to increase uptake throughout Europe

Protected and off-patent marked share (volume) by country, June 2015

Source: IMS Health, MIDAS, Q2 2015, retail and hospital channel
Note: Non-original brands and branded generics include copy products in some countries; Generics include INN branded and company branded
Generic medicines increase patient access

Twice as many patients treated... without an impact on treatment costs

Evolution of volume, price and treatment cost in seven therapy areas

Selected therapy areas: Hypertension, epilepsy, gastro-intestinal disorders, mental health, high cholesterol and diabetes.
THE EVIDENCE THAT THE ROOT CAUSE OF MEDICINES SHORTAGES ARE ECONOMIC, INCLUDING UNSUSTAINABLE P&R POLICIES, IS OVERWHELMING

Kweder 2013

“It is time for health-care systems to recognize that such costs and economic drivers are essential elements”

De Weerdt 2015

“For generic medicines, internal or external reference pricing, tendering as well as price capping may affect drug shortages”

Pauwels 2014

“Beyond pure manufacturing problems related to technical issues or quality problems and can also involve economic factors”

Pauwels 2015

“For generic medicines, internal or external reference pricing, tendering as well as price capping may affect drug shortages”

PATIENTS • QUALITY • VALUE • SUSTAINABILITY • PARTNERSHIP
TACKLING SHORTAGES
IN THE OFF-PATENT SECTOR

• Healthy competition policies can prevent medicines shortages

• Price cuts and increasing regulatory costs make it difficult to introduce or maintain generic products in the market

• Aligned communication between authorities and manufacturers can help to prevent shortages

• Continuous dialogue between key stakeholders to validate solutions is required
References