Facts & Figures

BIOSIMILAR MEDICINES IN BELGIUM: **UNMET POTENTIAL**

02/2021

Medaxes
Association for accessible medicines

CHARACTERISTICS OF A BIOSIMILAR MEDICINE

Biosimilar medicine

Biological molecule

Therapeutic equivalence with reference medicine

After patent expiry,

35,80% - 43,54%

cheaper than initial price of reference medicine*

Generic medicine

Chemical molecule

Therapeutic equivalence with reference medicine

After patent expiry,

54,77% - 65,78%

cheaper than initial price of reference medicine*

** Numbers valid until 31/03/2021*

BIOSIMILAR MEDICINES: ADDED VALUE

Biosimilar medicines

- Lead to competition
- Decrease prices
- Reduce healthcare expenditure
- Broaden therapeutic options
- Trigger product innovation in the off-patent sector
- Multiply suppliers

What if there were no biosimilar medicines?

€350 million

extra expenditure for NIHDI in 2020*

* *Internal calculations based on IQVIA, LMPB & BHA files, 07/2020*

Medaxes
Association for accessible medicines

BIOSIMILAR MEDICINES IN BELGIUM IN A NUTSHELL

Molecule	Number of biosimilar medicine manufacturers on the market*	Biosimilar medicine turnover Public pharmacies** (in €)	Biosimilar medicine turnover Hospitals** (in €)	Biosimilar medicine turnover Total** (in €)
Adalimumab	5	9.385.750	522.774	9.908.524
Bevacuzimab	2	NA	0	0
Enoxaparin	2	0	0	0
Epoetin	1	NA	1.012.165	1.012.165
Etanercept	2	5.993.490	11.422	6.004.912
Filgrastim	4	8.150	1.690.560	1.698.710
Follatropin Alfa	2	NA	1.938.820	1.938.820
Infliximab	4	NA	48.296.771	48.296.771
Insulin glargine	1	559.990	41.876	601.866
Pegfilgrastim	3	NA	69.108	69.108
Rituximab	2	NA	3.280.993	3.280.993
Somatropin	1	3.570.200	21.435	3.591.635
Trastuzumab	5	NA	1.620.000	1.620.000
TOTAL		**19.517.580**	**58.505.924**	**78.023.504**

** Source: NIHDI, SSP file, 01/01/2021*

*** Source: IQVIA, LMPB & BHA, 07/2020 - ex factory prices*

BIOSIMILAR MEDICINES: BELGIUM IS LAGGING BEHIND

Market share in volume: Belgium compared to other EU countries *(1/3)*

Molecule	Originator or Biosimilar	Belgium (%)	France (%)	Germany (%)	Italy (%)	UK (%)
Adalimumab	Originator	87,37	81,85	34,97	49,93	24,59
Adalimumab	Originator (PI)	0,00	0,00	20,33	0,00	0,00
Adalimumab	**Biosimilars**	**12,63**	**18,15**	**44,70**	**50,07**	**75,41**
Bevacizumab	Originator	99,95	94,41	91,35	97,28	99,89
Bevacizumab	Originator (PI)	0,00	0,00	4,18	0,00	0,00
Bevacizumab	**Biosimilars**	**0,05**	**5,59**	**4,48**	**2,72**	**0,11**
Enoxaparin Sodium	Originator	100,00	94,27	71,15	57,40	52,42
Enoxaparin Sodium	Originator (PI)	0,00	0,00	4,70	0,00	0,00
Enoxaparin Sodium	**Biosimilars**	**0,00**	**5,73**	**24,16**	**42,60**	**47,58**
Epoetin Alfa	Originator	89,93	35,77	17,45	25,12	88,81
Epoetin Alfa	Originator (PI)	0,00	0,00	0,00	0,00	0,00
Epoetin Alfa	**Biosimilars**	**10,07**	**64,23**	**82,55**	**74,88**	**11,19**
Etanercept	Originator	85,44	69,49	20,71	47,25	17,82
Etanercept	Originator (PI)	0,00	0,00	12,95	0,00	0,00
Etanercept	**Biosimilars**	**14,56**	**30,51**	**66,34**	**52,75**	**82,18**

Source: IQVIA, MAT Q3, 2020

Medaxes
Association for accessible medicines

BIOSIMILAR MEDICINES: BELGIUM IS LAGGING BEHIND

Market share in volume: Belgium compared to other EU countries *(2/3)*

Molecule	Originator or Biosimilar	Belgium (%)	France (%)	Germany (%)	Italy (%)	UK (%)
Filgrastim	Originator	66,33	4,05	24,06	4,13	0,60
Filgrastim	Originator (PI)	0,00	0,00	1,94	0,00	0,00
Filgrastim	**Biosimilars**	**33,67**	**95,95**	**74,00**	**95,87**	**99,40**
Follitropin Alfa	Originator	54,17	69,33	34,17	69,09	76,97
Follitropin Alfa	Originator (PI)	0,00	0,00	31,32	0,00	0,00
Follitropin Alfa	**Biosimilars**	**45,83**	**30,67**	**34,51**	**30,91**	**23,03**
Infliximab	Originator	60,88	27,44	21,28	10,41	5,88
Infliximab	Originator (PI)	0,00	0,00	8,53	0,00	0,00
Infliximab	**Biosimilars**	**39,12**	**72,56**	**70,19**	**89,59**	**94,12**
Insulin Glargine	Originator	97,56	81,51	87,62	83,59	89,55
Insulin Glargine	Originator (PI)	0,00	0,00	1,25	0,00	0,00
Insulin Glargine	**Biosimilars**	**2,44**	**18,49**	**11,13**	**16,41**	**10,45**
Insulin Lispro	Originator	100,00	100,00	95,23	92,92	99,64
Insulin Lispro	Originator (PI)	0,00	0,00	1,11	0,00	0,00
Insulin Lispro	**Biosimilars**	**0,00**	**0,00**	**3,66**	**7,08**	**0,36**

Source: IQVIA, MAT Q3, 2020

BIOSIMILAR MEDICINES: BELGIUM IS LAGGING BEHIND

Market share in volume: Belgium compared to other EU countries *(3/3)*

Molecule	Originator or Biosimilar	Belgium (%)	France (%)	Germany (%)	Italy (%)	UK (%)
Pegfilgrastim	Originator	98,52	45,21	50,77	37,88	36,34
Pegfilgrastim	Originator (PI)	0,00	0,00	6,49	0,00	0,00
Pegfilgrastim	**Biosimilars**	**1,48**	**54,79**	**42,74**	**62,12**	**63,66**
Rituximab	Originator	91,78	34,15	19,83	25,65	14,91
Rituximab	Originator (PI)	0,00	0,00	9,79	0,00	0,00
Rituximab	**Biosimilars**	**8,22**	**65,85**	**70,39**	**74,35**	**85,09**
Somatropin	Originator	81,13	82,43	70,05	81,74	80,90
Somatropin	Originator (PI)	0,00	0,00	13,33	0,00	0,00
Somatropin	**Biosimilars**	**18,87**	**17,57**	**16,62**	**18,26**	**19,10**
Teriparatide	Originator	100,00	94,72	67,41	94,01	83,94
Teriparatide	Originator (PI)	0,00	0,00	22,75	0,00	0,00
Teriparatide	**Biosimilars**	**0,00**	**5,28**	**9,84**	**5,99**	**16,06**
Trastuzumab	Originator	96,34	66,62	49,06	36,45	58,04
Trastuzumab	Originator (PI)	0,00	0,00	14,55	0,00	0,00
Trastuzumab	**Biosimilars**	**3,66**	**33,38**	**36,39**	**63,55**	**41,96**

Source: IQVIA, MAT Q3, 2020

Medaxes
Association for accessible medicines

BIOSIMILAR MEDICINES: RECENT LAUNCHES SLOW MARKET PENETRATION

Belgium

Biosimilar **trastuzumab**: market share in volume

Source: IQVIA, BHA, 08/2020

Biosimilar **rituximab**: market share in volume

Source: IQVIA, BHA, 08/2020

Biosimilar **etanercept**: market share in volume

Source: IQVIA, LMPB, 08/2020

Biosimilar **adalimumab**: market share in volume

Source: IQVIA, LMPB, 08/2020

BIOSIMILAR MEDICINES: RECENT LAUNCHES SLOW MARKET PENETRATION

Belgium compared to other countries

Biosimilar **trastuzumab**: market share in volume

Source: IQVIA, MAT Q3, 2018-2020

Biosimilar **rituximab**: market share in volume

Source: IQVIA, MAT Q3, 2018-2020

Biosimilar **etanercept**: market share in volume

Source: IQVIA, MAT Q3, 2018-2020

Biosimilar **adalimumab**: market share in volume

Source: IQVIA, MAT Q3, 2018-2020

Medaxes
Association for accessible medicines

BIOSIMILAR MEDICINES: MORE THAN LEGAL PRICE DECREASES

NIHDI

- Opportunity for additional saving mechanisms, such as invoicing or groupwise revisions, F-reimbursement, ...
- Possibility to capitalise on price differentials

€52 million
annual savings for NIHDI thanks to 85% invoicing mechanism

€24 million
immediate savings for NIHDI if more expensive versions were replaced by biosimilars

PATIENTS

- Improve access

HOSPITALS

- Benefits from competition between different providers

€348 million
turnover of biological medicines with biosimilar competition in hospitals

HEALTHCARE PROFESSIONALS

- Enlarge therapeutic treatment options
- Opportunity for 'gain sharing' mechanisms, allowing better patient treatment

Source: Internal calculations based on IQVIA, LMPB & BHA files

BIOSIMILAR MEDICINES: FUTURE OPPORTUNITIES *(1/3)*

Active substance	Originator(s)	Turnover originator(s) total (€)
Abatacept	Orencia	17.209.303
Aflibercept	Eylea	50.038.423
Certolizumab pegol	Cimzia	18.248.073
Cetuximab	Erbitux	13.273.511
Daratumumab	Darzalex	56.429.023
Darbepoetin alfa	Aranesp	56.318.623
Denosumab	Xgeva, Prolia	35.578.335
Eculizumab	Soliris	10.940.320
Evolocumab	Repatha	3.610.838
Glucagon 🔍	Glucagen hypokit	507.016
Golimumab	Simponi	25.943.532
Insulin aspart 🔍	Novorapid, Novomix, Fiasp	18.710.950
Insulin human ✔	Multiple	6.861.140

🔍 under evaluation EMA ✔ EMA approval

Source: IQVIA, MAT, 08/2020

Medaxes
Association for accessible medicines

BIOSIMILAR MEDICINES: FUTURE OPPORTUNITIES *(2/3)*

Active substance	Originator(s)	Turnover originator(s) total (€)
Interferon alfa-2a ✔	Roferon	65.699
Interferon beta-1a	Avonex, Rebif	11.525.295
Interferon beta-1b	Betaferon	2.063.319
Ipilimumab	Yervoy	18.945.438
Liraglutide	Victoza	6.509.087
Natalizumab	Tysabri	17.716.829
Nivolumab	Opdivo	139.576.898
Octocog alpha	Advate	36.644.869
Omalizumab	Xolair	28.408.439
OnabotulinumtoxinA	Botox	0
Panitumumab	Vectibix	8.304.068
Pegaspargase	Oncaspar	453.018

🔍 under evaluation EMA ✔ EMA approval

Source: IQVIA, MAT, 08/2020

BIOSIMILAR MEDICINES: FUTURE OPPORTUNITIES *(3/3)*

Active substance	Originator(s)	Turnover originator(s) total (€)
Pembrolizumab	Keytruda	214.732.325
Pertuzumab	Perjeta	45.715.493
Ramucirumab	Cyramza	3.282.265
Ranibizumab 🔍	Lucentis	46.121.460
Secukinumab	Cosentyx	24.739.141
Tocilizumab	Actemra	21.328.767
Trastuzumab emtansine	Kadcyla	12.766.743
Ustekinumab	Stelara	48.292.969
Vedolizumab	Entyvio	73.388.160
Total		**1.074.249.370**

🔍 under evaluation EMA ✔ EMA approval

Source: IQVIA, MAT, 08/2020

Disclaimer: The information provided has been drawn by Medaxes from various sources, both public and non-public. Even though this information was gathered and established with due care, the data provided are for information purposes only and remain indicative.

Medaxes
Association for accessible medicines

ABOUT MEDAXES

Our mission

Medaxes is the Belgian association of pharmaceutical companies that want to contribute to making healthcare accessible to all.

Medaxes focuses on three levers: generic medicines, biosimilar medicines and self-care products.

Medaxes aims to provide high quality solutions for efficient and sustainable healthcare in a well-configured environment.

Medaxes works in partnership with healthcare stakeholders. For its members, Medaxes acts as a representative platform, offering a wide range of services in support of their individual activities and common interests.

Medaxes
Association for accessible medicines

Medaxes
Association for
accessible medicines

Medaxes 2021

Medaxes vzw/asbl
Sint-Amandsstraat 2 - 1853 Strombeek-Bever - T +32 (0)3 820 14 88
www.medaxes.be - info@medaxes.be
Responsible publisher: Joris Van Assche