

Facts & Figures

GENERIC MEDICINES
IN BELGIUM - 05/2022



GENERIC MEDICINES IN BELGIUM IN A NUTSHELL



Total number of
generic molecules
(2021)



247
in public
pharmacies



305
in hospitals



Total number of
generic medicines
packs (SKUs) (2021)



2.637
in public
pharmacies



1.637
in hospitals



Turnover reimbursed
generic medicines, in public
pharmacies & hospitals



552 million €



If there were no reimbursed
generic medicines on the market,
NIHDI would have
to spend an additional

1,949 billion €

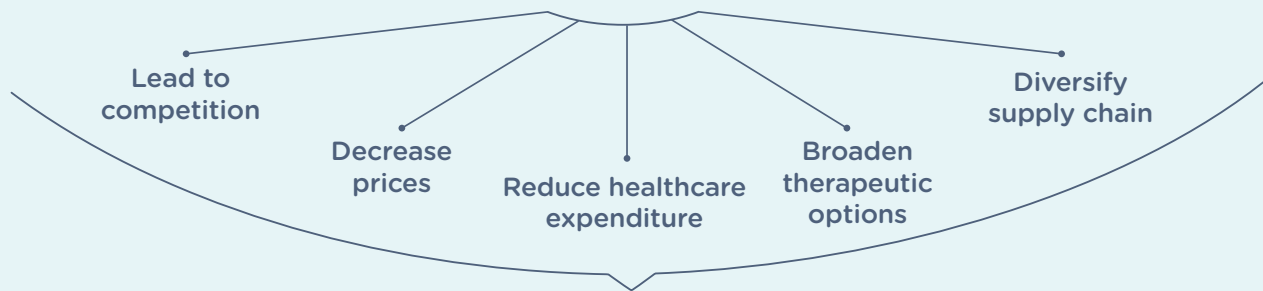
15 Medaxes
member companies



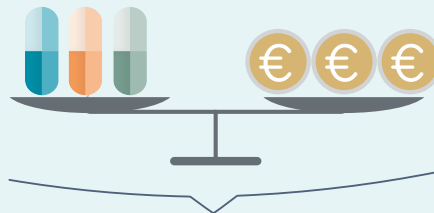
Source: IQVIA LMPB 03/2022 & BHA 02/2022, reimbursed medicines

GENERIC MEDICINES: ADDED VALUE

Generic medicines




Added value is maximised when a sustainable balance between price and volume is reached



‘Generic optimum’


GENERIC MEDICINES IN BELGIUM: LIMITED USE (2021)

 IN PUBLIC PHARMACIES	#Molecules	Turnover (mio €)	Market share Turnover (%)	Volume (mio SU)	Market share Volume (%)
Originator medicines	719	1.912,9	82,5	4.505	58,7
Generic medicines	247	404,6	17,5	3.164	41,3
TOTAL	966	2.317,5	100	7.669	100

Generic medicines and copies

Source: IQVIA LMPB 03/2022 year 2021, reimbursed medicines, ex-factory prices

GENERIC MEDICINES IN BELGIUM: LIMITED USE (2021)

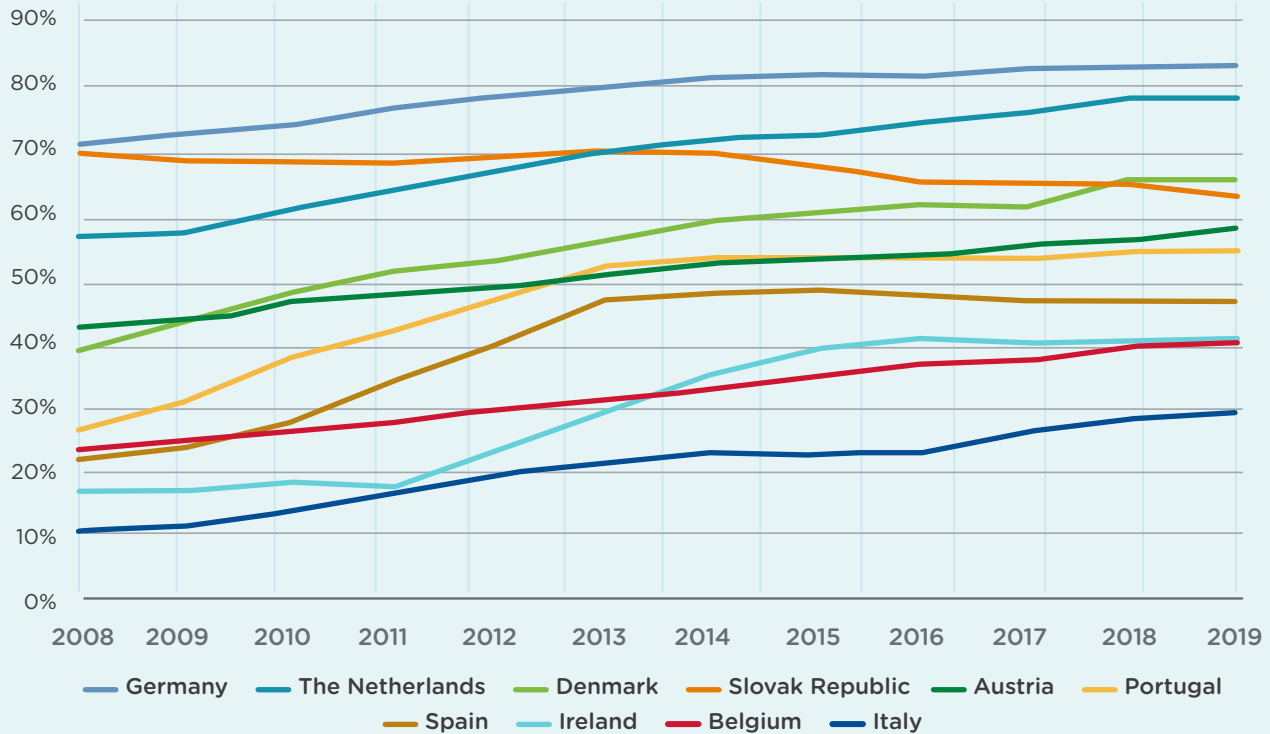
 IN HOSPITALS	#Molecules	Turnover (mio €)	Market share Turnover (%)	Volume (mio SU)	Market share Volume (%)
Originator medicines	1.045	3.163,4	95,5	400	84,2
Generic medicines	305	147,4	4,5	75	15,8
TOTAL	1.350	3.310,8	100	475	100

Generic medicines and copies

Source: IQVIA BHA 02/2022 year 2021, reimbursed medicines, ex-factory prices

GENERIC MEDICINES: BELGIUM IS LAGGING BEHIND

The share of the generics market remains lower than in other EU countries



Note: Data refer to the share of generics in volume.

Source: OECD.stat 10/2021

GENERIC MEDICINE PRICES⁽¹⁾ ARE DECREASING, WHEREAS NEW MEDICINE PRICES⁽²⁾ ARE INCREASING⁽³⁾

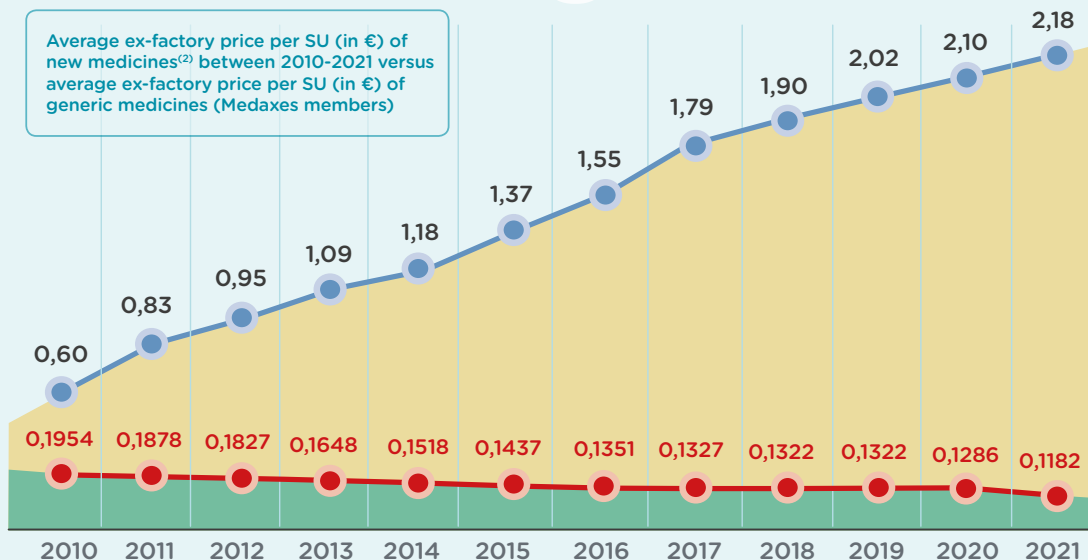
Average new medicine price increase
+263,33%

—●— New medicines

Average generic medicine price decrease
-39,51%

—●— Generic medicines and copies

Average ex-factory price per SU (in €) of new medicines⁽²⁾ between 2010-2021 versus average ex-factory price per SU (in €) of generic medicines (Medaxes members)



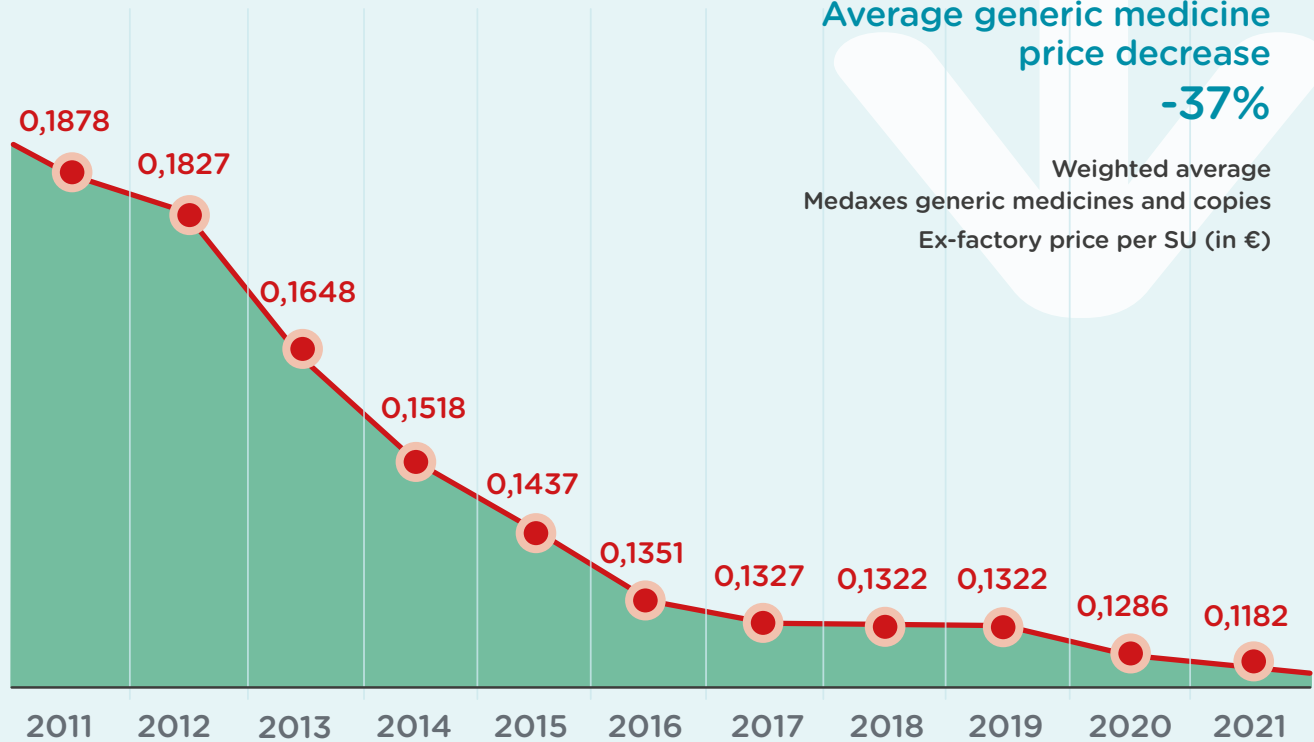
Source: IQVIA LMPB 02/2022

(1) As IQVIA figures are used, the cost price of medicines is expressed as ex-factory price (expressed per unit) (coded as SU in the IQVIA database).

(2) New medicine means: a medicine that has not yet been reimbursed for 12 years and for which no generic or biosimilar version is (yet) available on the market (01/09/2021). Capping at the age of 12 is done since medicines under 12 years of age are not subject to legal price reductions (price reductions linked to the 'age' of the medicine, often followed by additional price decreases due to annual budget saving measures). Such 'age-related' price decreases are applied as a matter of law to medicines that have been reimbursed for 12 years or more. Moreover, both originator and generic medicines are subject to these legal price reductions. This graph could not take into account refunds under 'managed entry agreements' or 'article 81/articles 111-112-113 agreements', as these benefit from a legally protected confidentiality.

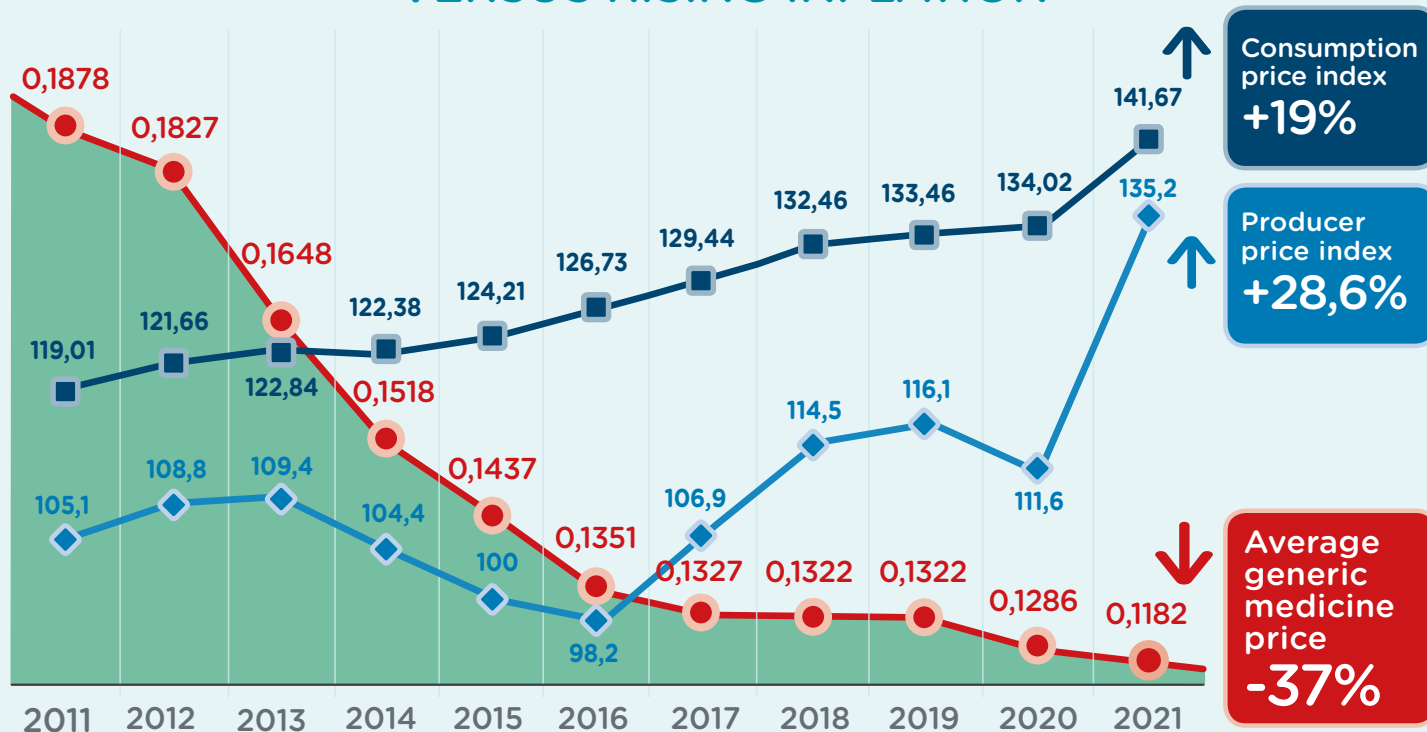
(3) Market of reimbursed medicines, distributed via public pharmacies.

GENERIC MEDICINES: PRICE EROSION



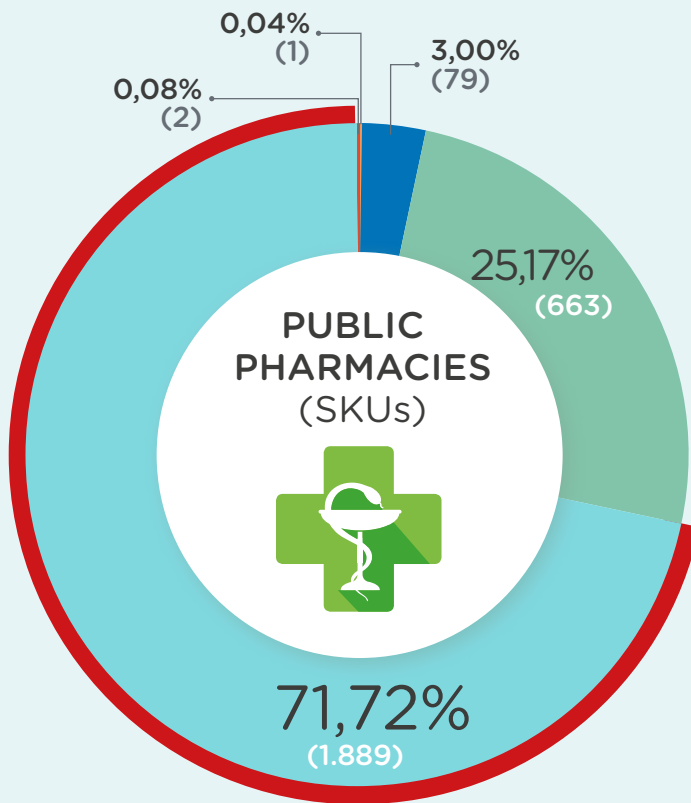
Source: IQVIA LMPB 02/2022

DECREASING PRICES GENERIC MEDICINES VERSUS RISING INFLATION



Sources: - IQVIA: LMPB 02/2022 (ex-factory price per SU in €, weighted average Medaxes generic medicines and copies)
 - Statbel: <https://statbel.fgov.be/en/themes/consumer-prices/consumer-price-index#figures> (December indices, reference year 2004 = 100) (01/05/2022)
 - Eurostat: https://ec.europa.eu/eurostat/databrowser/view/STS_INPPD_A__custom_2111482/default/table?lang=en (Annual indices, reference year 2015 = 100) (20/05/2022)

GENERIC MEDICINES: SMALL OPERATING BASE IN PUBLIC PHARMACIES

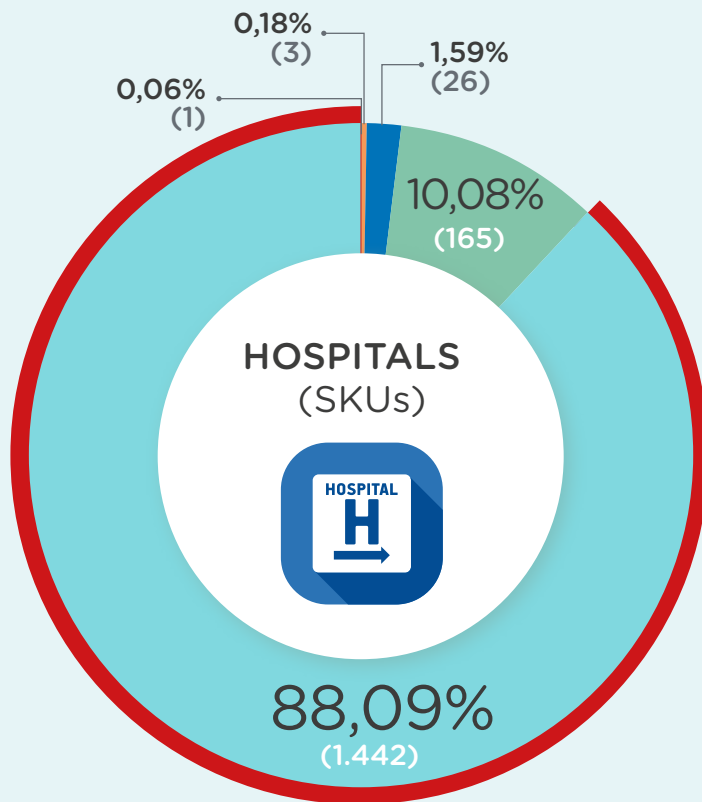


nearly
72%
of generic medicines
in public pharmacies
have a turnover
of less than 100 K €

- Turnover SKU Gx > 10 mio € (0,08%)
- 5 mio € < Turnover SKU Gx < 10 mio € (0,04%)
- 1 mio € < Turnover SKU Gx < 5 mio € (3,00%)
- 100 k € < Turnover SKU Gx < 1 mio € (25,17%)
- Turnover SKU Gx < 100 k € (71,72%)

Source: IQVIA LMPB 03/2022 year 2021, reimbursed medicines, ex-factory prices

GENERIC MEDICINES: SMALL OPERATING BASE IN HOSPITALS



more than
88%
of generic medicines
in hospitals have
a turnover of less
than 100 K €

- Turnover SKU Gx > 10 mio € (0,06%)
- 5 mio € < Turnover SKU Gx < 10 mio € (0,18%)
- 1 mio € < Turnover SKU Gx < 5 mio € (1,59%)
- 100 k € < Turnover SKU Gx < 1 mio € (10,08%)
- Turnover SKU Gx < 100 k € (88,09%)

Source: IQVIA BHA 02/2022 year 2021, reimbursed medicines, ex-factory prices

1 generic medicine* per day disappeared from the market over the past 2 years



793 reimbursed generic medicines either definitely **disappeared from the market**

or were not available for more than 12 months between February 2020 and January 2022.

Source: figures based on Medaxes's cross analyses of data from FAMHP PharmaStatus, NIHDI and IQVIA

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 generic and biosimilar medicines, as well as on other off-patent medicines and self-care products.

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

Medaxes strives to build a dialogue and work in partnership with other 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.

