

Facts & Figures

GENERIC MEDICINES
IN BELGIUM - 11/2020



GENERIC MEDICINES IN BELGIUM IN A NUTSHELL



Total number of
generic molecules
(2019)



247
in public
pharmacies



290
in hospitals



Total number of
generic medicines
packs (SKUs) (2019)



2.727
in public
pharmacies



1.687
in hospitals



Turnover reimbursed generic
medicines, in public pharmacies
& hospitals



551,2 million €



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

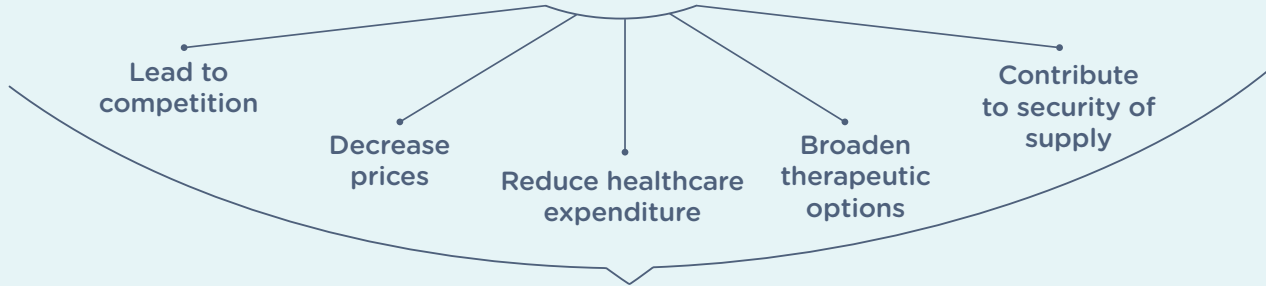
1,917 billion €

11 Medaxes
member companies

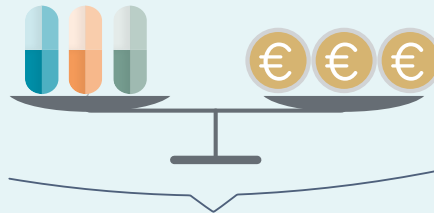


GENERIC MEDICINES: ADDED VALUE

Generic medicines




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




‘Generic optimum’

GENERIC MEDICINES IN BELGIUM: LIMITED USE (2019)

 IN PUBLIC PHARMACIES	#Molecules	Revenue (mio €)	Market share Revenue (%)	Volume (mio SU)	Market share Volume (%)
Originator medicines	732	2.080	82,88	5.095	62
Generic medicines	247	429	17,12	3.063	38
TOTAL	979	2.508	100	8.158	100

Generic medicines and copies

Source: Reimbursed medicines, LMPB 2019 (public pharmacies) - IQVIA 04/2020 - ex factory prices

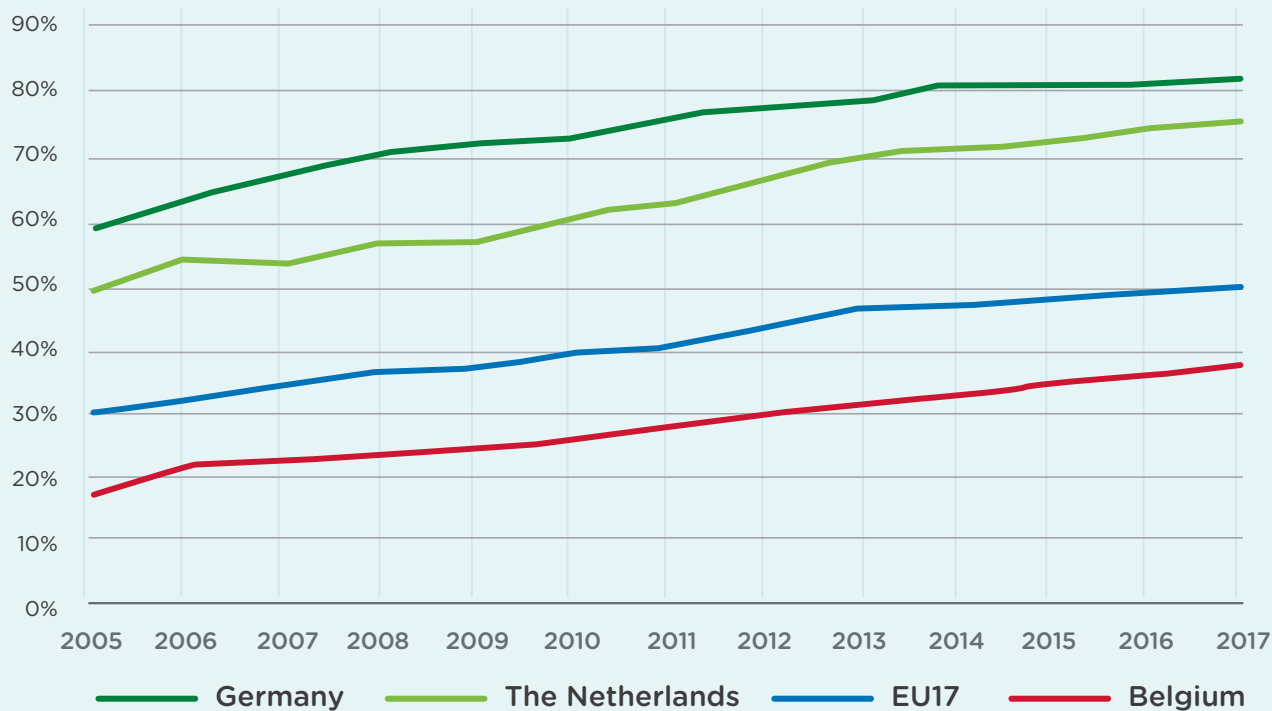
 IN HOSPITALS	#Molecules	Revenue (mio €)	Market share Revenue (%)	Volume (mio SU)	Market share Volume (%)
Originator medicines	1.079	2.599	96	287	82
Generic medicines	298	122	4	63	18
TOTAL	1.377	2.721	100	352	100

Generic medicines and copies

Source: Reimbursed medicines, BHA 2019 (hospitals) - IQVIA 03/2020 - 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 Health Statistics 2019

GENERIC MEDICINE PRICES ARE DECREASING, WHEREAS NEW MEDICINE PRICES ARE INCREASING

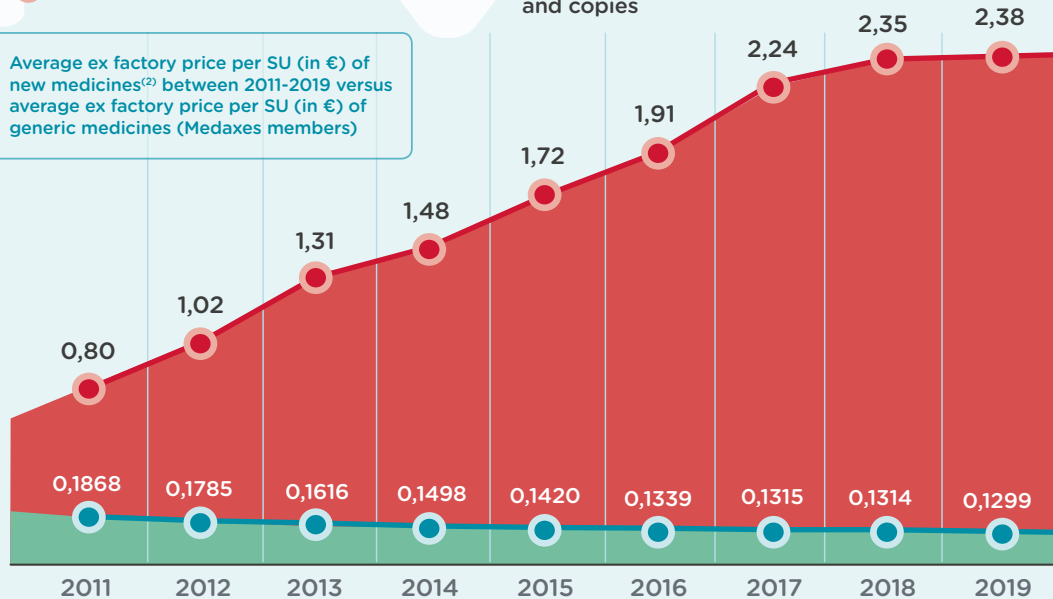
New medicine price increase nearly **+300% in 9 years**

Generic medicine price decrease **-32% in 9 years**

● New medicines

● Generic medicines and copies

Average ex factory price per SU (in €) of new medicines⁽²⁾ between 2011-2019 versus average ex factory price per SU (in €) of generic medicines (Medaxes members)



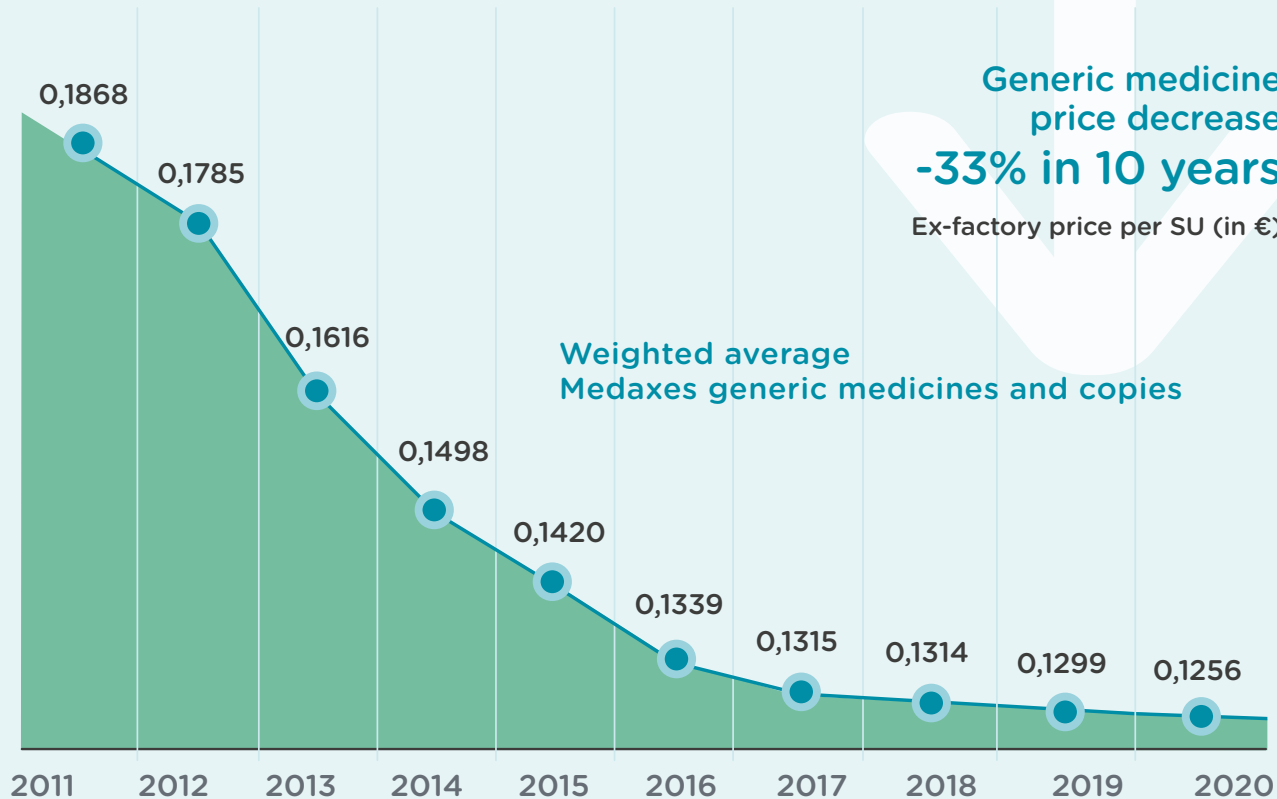
(1) As IQVIA figures are used, the cost price of medicines is expressed as ex-factory price (expressed per unit) (coded as SU in the IQVIA database).

(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 (01/07/2020). 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.

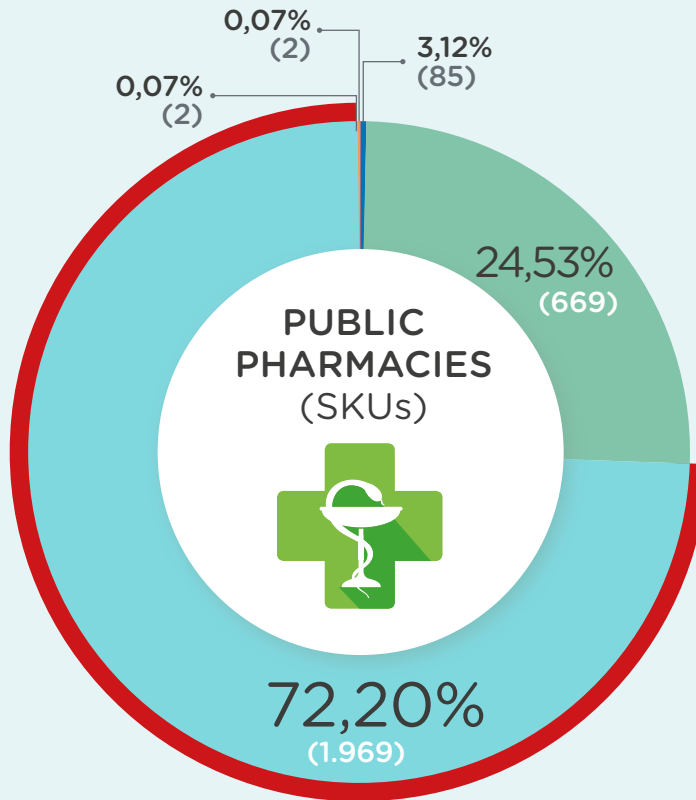
Source: IQVIA LMPB 04/2020

GENERIC MEDICINES: PRICE EROSION



Source: IQVIA LMPB 04/2020

GENERIC MEDICINES: SMALL OPERATING BASE IN PUBLIC PHARMACIES

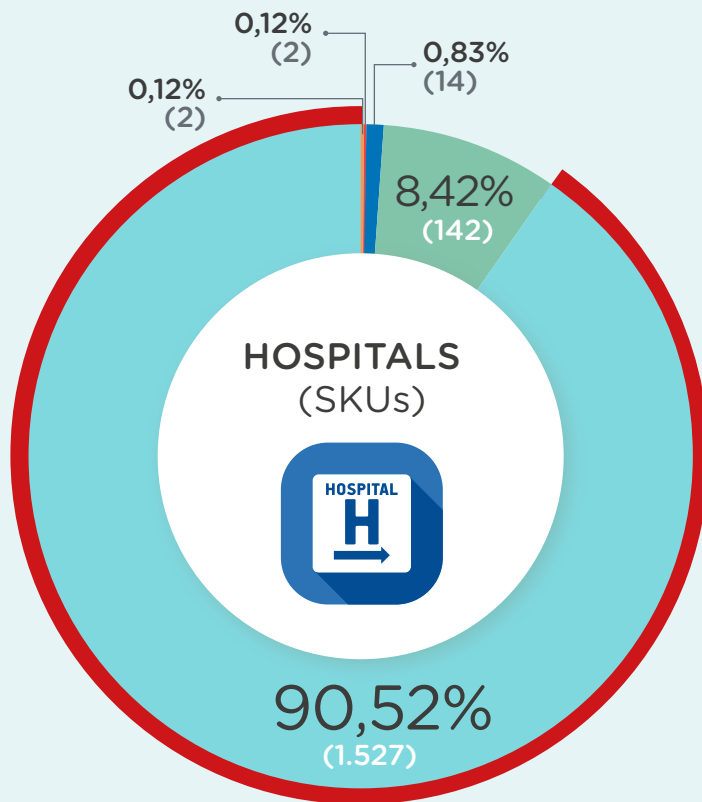


72%
of generic medicines
in public pharmacies
have a turnover
of less than 100 K €

- Turnover SKU Gx > 10 mio € (0,07%)
- 5 mio € < Turnover SKU Gx < 10 mio € (0,07%)
- 1 mio € < Turnover SKU Gx < 5 mio € (3,12%)
- 100 k € < Turnover SKU Gx < 1 mio € (24,53%)
- Turnover SKU Gx < 100 k € (72,20%)

Source: Reimbursed medicines, LMPB 2019
(public pharmacies)
IQVIA 04/2020 - ex factory prices

GENERIC MEDICINES: SMALL OPERATING BASE IN HOSPITALS



over **90%**
of generic medicines
in hospitals have
a turnover of less
than 100 K €

- Turnover SKU Gx > 10 mio € (0,12%)
- 5 mio € < Turnover SKU Gx < 10 mio € (0,12%)
- 1 mio € < Turnover SKU Gx < 5 mio € (0,83%)
- 100 k € < Turnover SKU Gx < 1 mio € (8,42%)
- Turnover SKU Gx < 100 k € (90,52%)

Source: Reimbursed medicines, BHA 2019 (hospitals)
IQVIA 03/2020 – ex factory prices

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 2020

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