



*Making Medicines Affordable*

EUROPEAN GENERIC MEDICINES ASSOCIATION



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# **Creating the Right Environment for a Sustainable Generic Medicines Market**

**Istanbul, 14<sup>th</sup> June 2007**

**EMILE LOOF**  
**President EGA**

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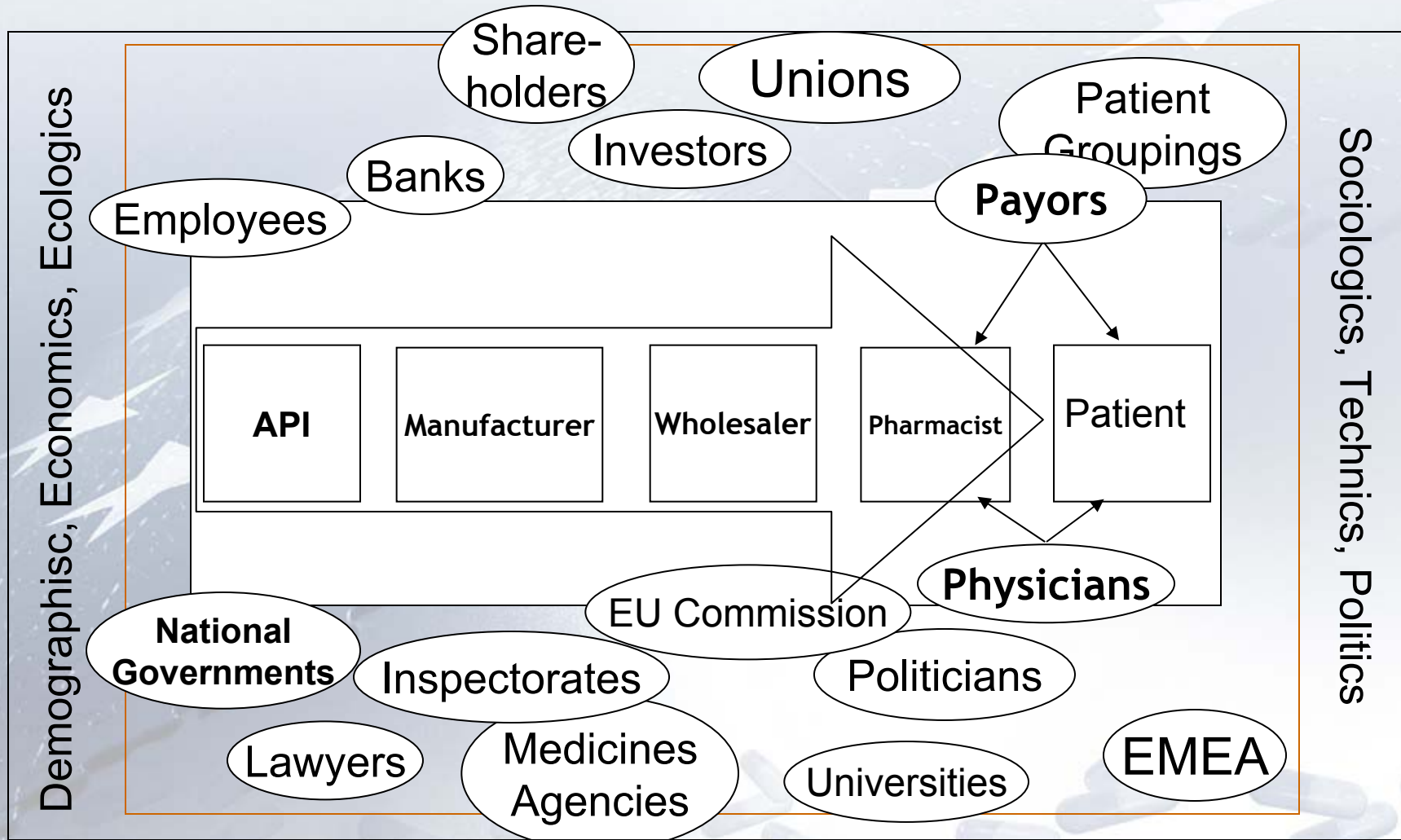
# Sustainable ?

## ■ Marketing:

- satisfy customer's need
- maintain right image with stakeholders



# Market & Environment





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# We've paid attention to ...

- Ministry of Health, Inspectorates (Production license)
  - Wholesalers (Distribution agreements)
  - Physicians (Prescriptions)
  - > 60's: Agencies (Marketing Authorisation)
  - > 80's: Pharmacists (Substitution rights)
  - > '91: EU Institutions (EU law, i.e. SPC)
  - > '96: Collegues & Competitors (CEE accession)
  - > '97: National Payors & Reimbursement Agencies (Bangemann: "Headroom for Innovation")
  - > 2000: G10 & Global Partners (GATT, WTO, TRIPs)
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# Mature & Developing Generic Markets

■ UK	24 % - 45 %
■ Netherlands	20 % - 51 %
■ Germany	22 % - 42 %
■ Denmark	55 % - 83 %
■ Hungary	29% - 44%
■ Poland	53% - 70%
■ Czech Rep.	31% - 63%
■ Slovenia	34% - 60%
■ Baltic Region	50% - 77%
■ Belgium	6 % - 15 %
■ France	8 % - 16 %
■ Italy	3,5% - 7%
■ Spain	5,7% - 10%
■ Portugal	14% - 9%
■ Finland	2 % - 6 %
■ Austria	5 % - 8 %



Source: EGA 2006 Annual Conference  
(Portugal, packs vs ddd)

# Along the “Bidet-line” and the former Iron Curtain

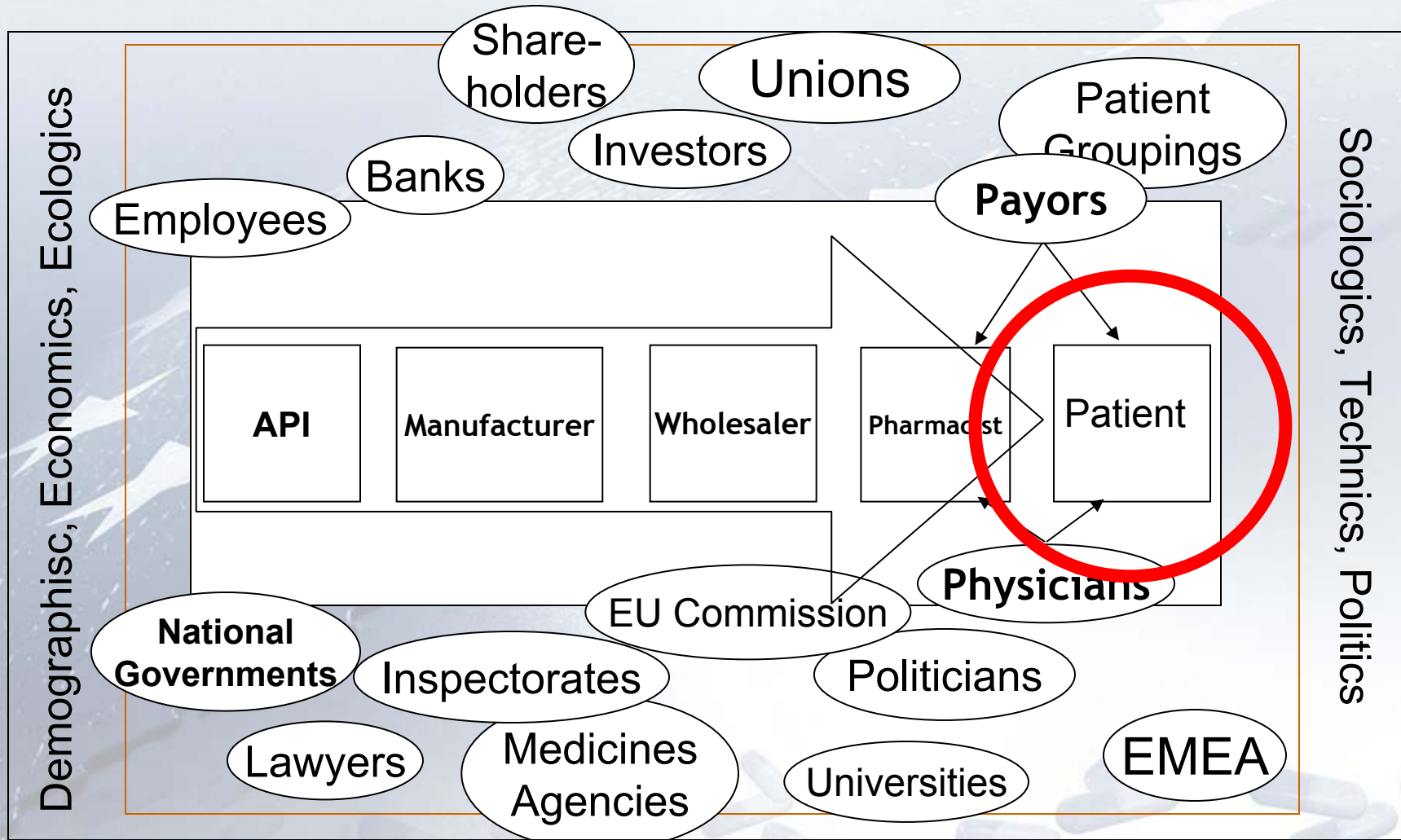
## Culture created 3 major EU Market Regions

- Anglo-Saxon
- Latin
- Slavic





# Market & Environment



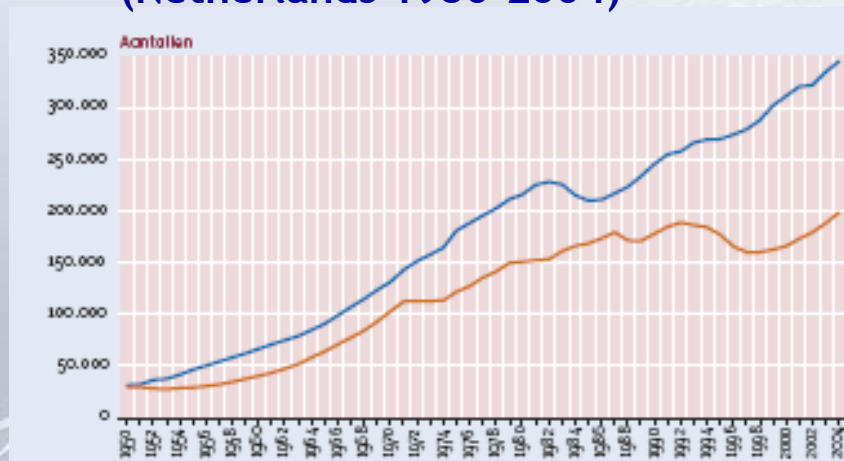




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# Increased Patient Competence

## University & College Students (Netherlands 1950-2004)



Source: Kennis in Kaart, Min.OCW, Oct 2005

## Education EU Population 25-64 yr (2004)

Higher Secondary Level	71 %
Masters & Bachelor	23 %

Source: Education at a Glance, OESO, 2006





# No Drivers to Address the EU Patient & its Groupings

- **'The Doctor is Always Right'-culture**
  - **EU Ban on Rx Direct To Consumer Advertising, DTCA**
  - **EU-wide reimbursement of all available pharmaceuticals**
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# Change of Patient Education & Competence

- Volume: post war 'Baby-boom' over 65 entering the market
  - Well educated after 1960's
  - The doctor is no longer the only one ...
  - Reimburse 100 % ?
  
  - "Patient Education"  
Google: 84.400.000 hits !!!
-

# Image of 'a Generic medicine'

## Five basic Questions about Generic Medicines:

NL: 70% of respondents gave either a wrong answer or no answer

contra

US: 70% know the basics of generics

Teva Pharmachemie &  
Direct Research.nl  
May 2007.  
N=500, Dutch

# ...a Sustainable Generic Medicines Market ...

## ■ Old partners and stakeholders

- Physicians (Biosimilars)
- Pharmacists
- Payors
- Governments & Agencies
- etc.

## ■ Patients (national)

## ■ Patient groupings (EU level)

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# Messages to Patients to Work on

- **it's Bioequivalent**
- **it 's a Legitimate substitute**
- **it 's a Professional quality alternative**
- **it has a better ratio Quality : Price**
- **it keeps Your Personal Health Care System Affordable**



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**By us and by Health Authorities !!!**

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