



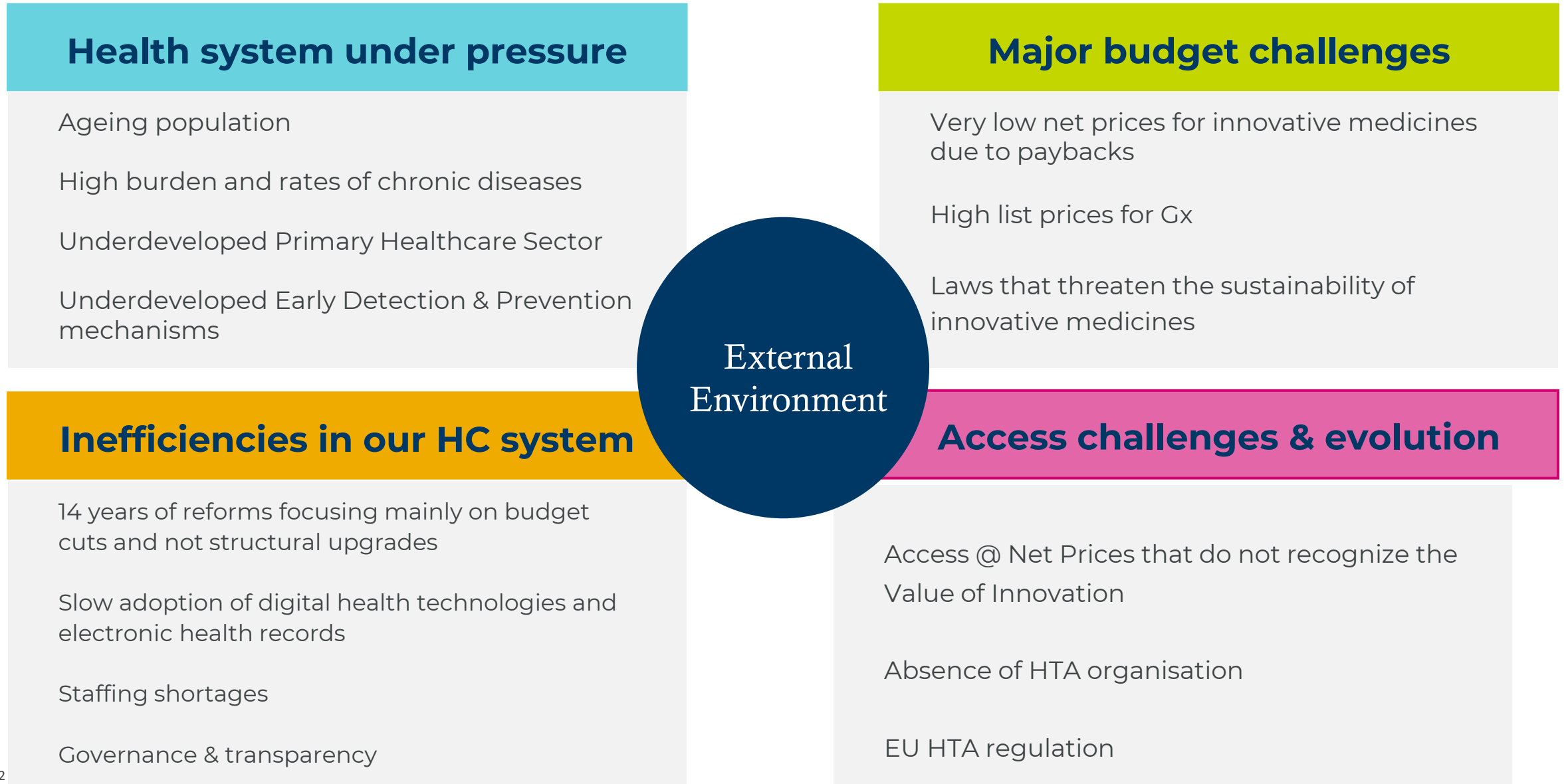
Διασφάλιση της πρόσβασης στη φαρμακευτική καινοτομία σε ένα περιβάλλον αυξημένων αναγκών υγείας

Γιώτα Κοτσεκίδου

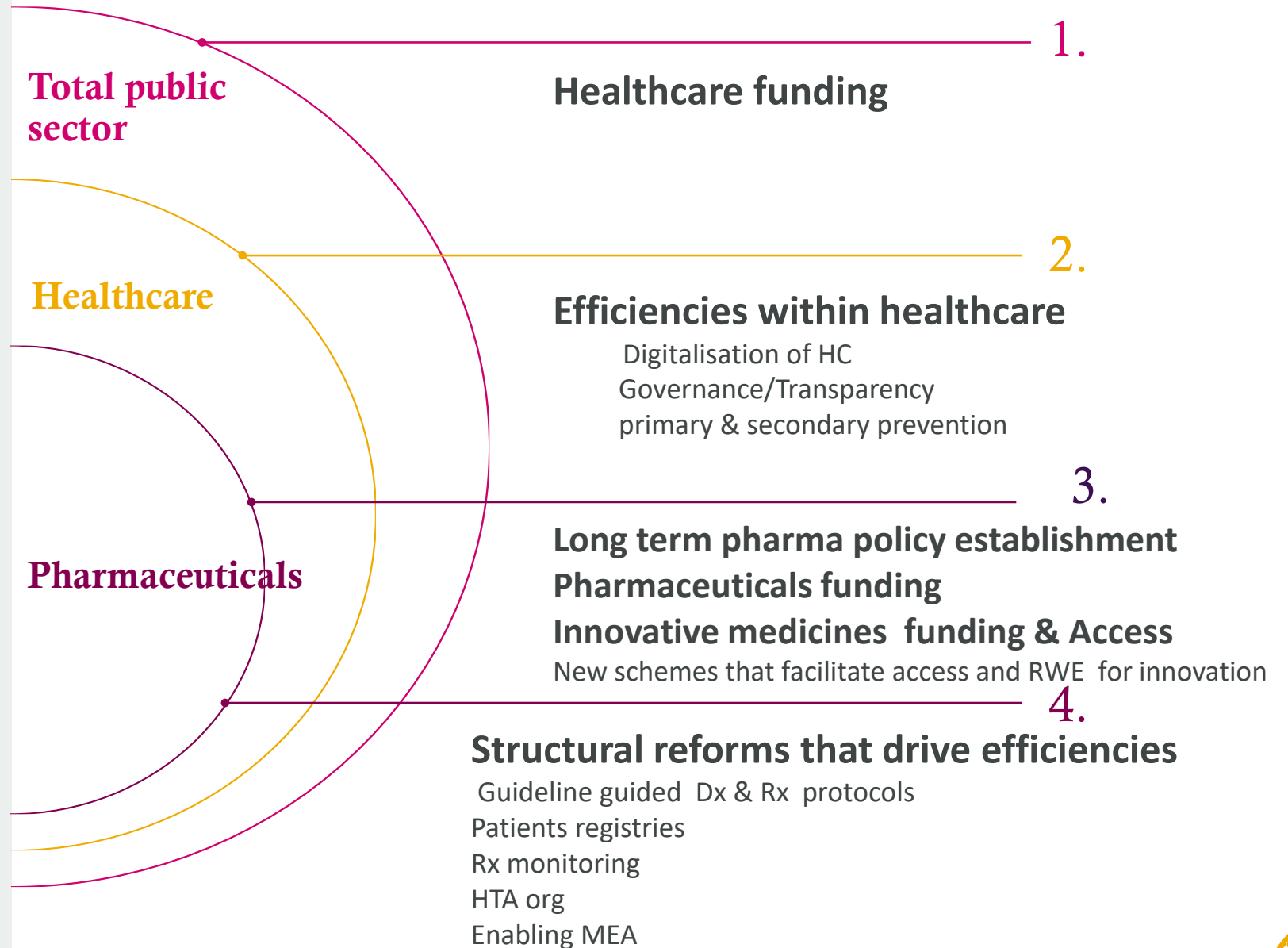
Corporate & Regulatory Affairs Director, AstraZeneca



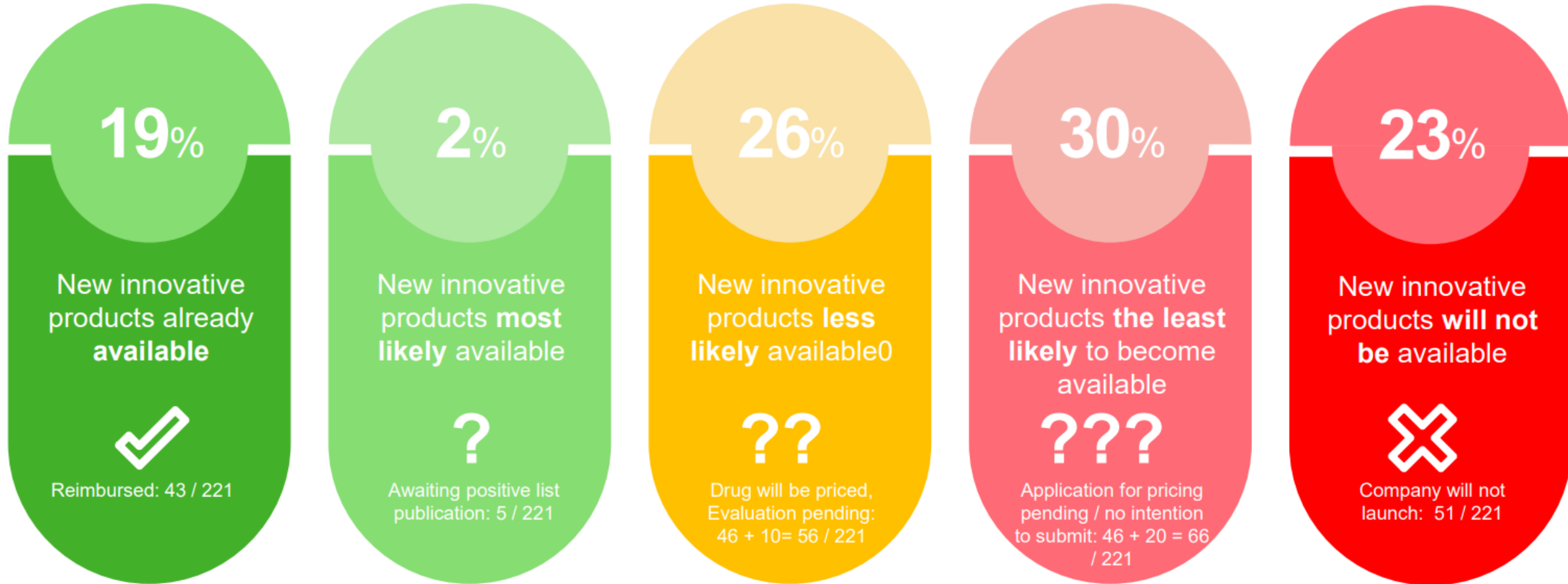
A variety of factors affect access to innovative medicines



Need for a holistic long term strategic approach

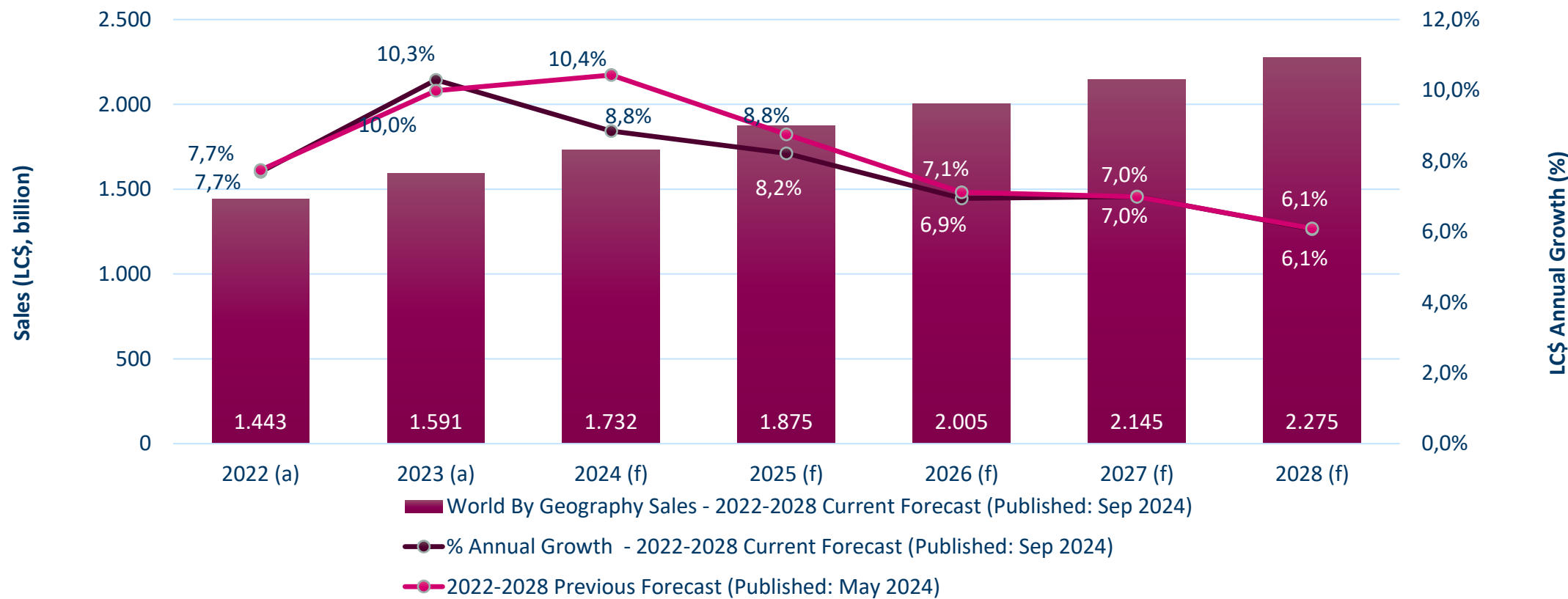


Greece: 53% of new medicines may not be available with current economic conditions



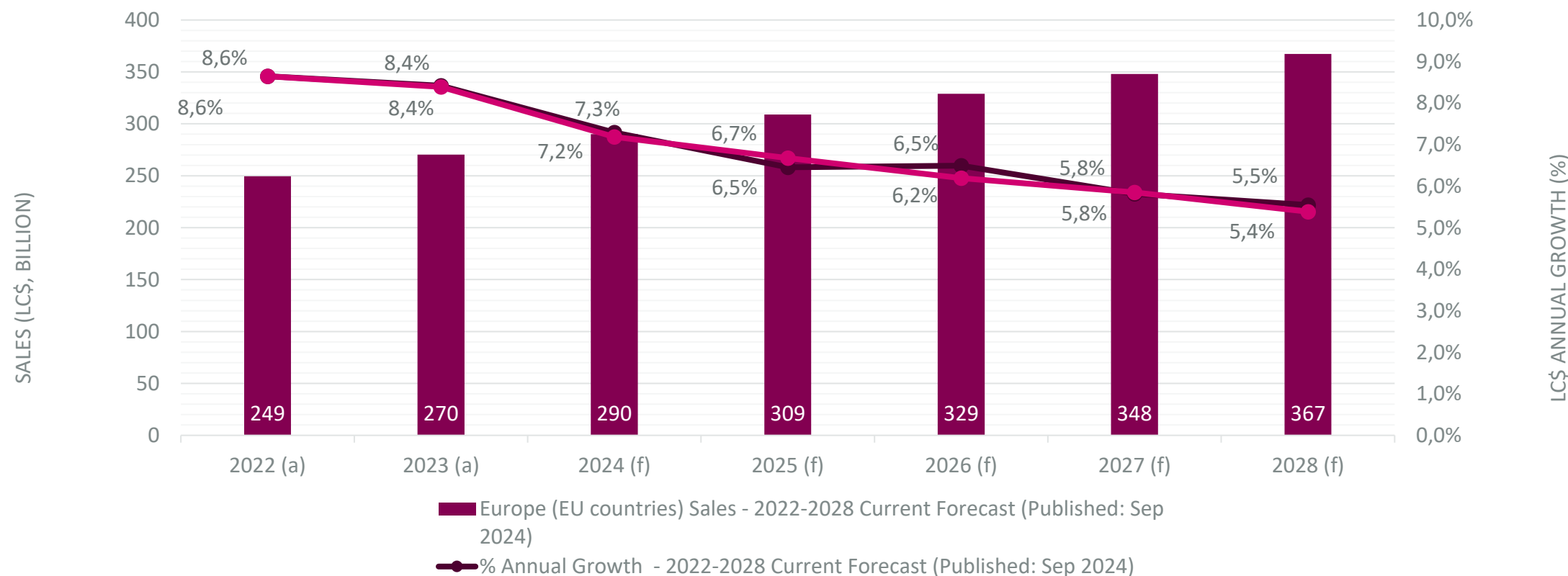
The global pharmaceutical market is forecast to grow at a CAGR of 7.4% between 2023 and 2028

World Pharmaceutical Market Forecast – Sales and Growth (2022-2028)

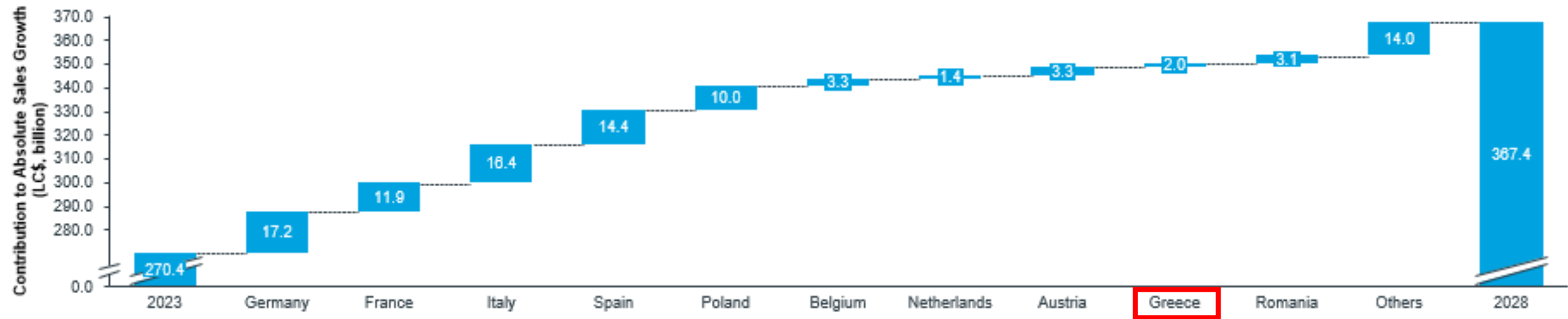


The European (EU countries) pharmaceutical market is forecast to grow at a CAGR of 6.3% between 2023 and 2028

Europe (EU) Pharmaceutical Market Forecast – Sales and Growth (2022-2028)



Greece with an estimated 2023-2028 CAGR of 5.5% (higher from previous period)



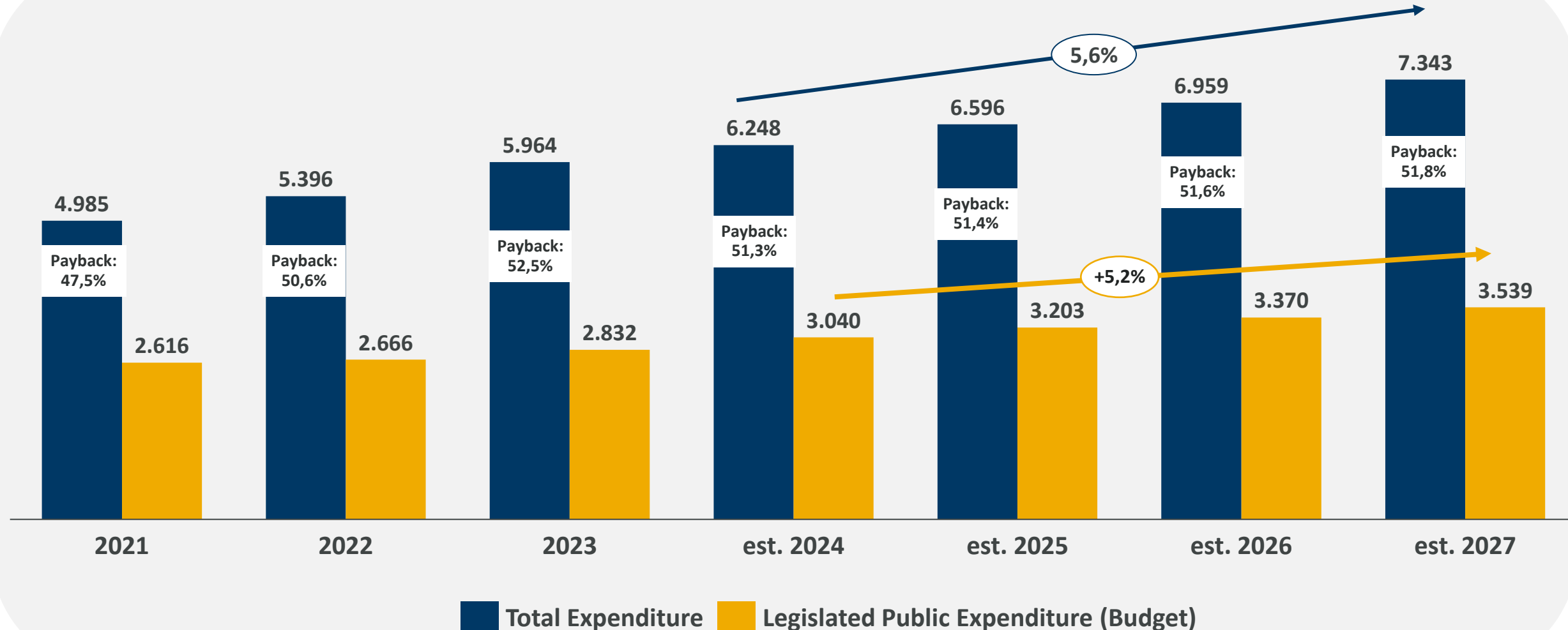
Region	Germany	France	Italy	Spain	Poland	Belgium	Netherlands	Austria	Greece	Romania	Others	Total
2024 Sales (LC\$, bn)	68.7	48.2	44.0	35.2	13.7	8.7	8.2	7.4	7.0	6.5	42.5	290.1
CAGR 2023-2028	4.9%	4.7%	7.0%	7.7%	12.9%	7.0%	3.4%	8.2%	5.5%	8.8%	6.3%	6.3%
Historical CAGR 2018-2023	6.6%	7.0%	5.8%	7.2%	10.5%	6.8%	6.4%	7.6%	4.6%	12.6%	7.0%	6.9%



Public pharma budget insufficient funding results in increasing pay-backs

Since 2022 pharmaceutical industry payback >50% of the total pharmaceutical expenditure

Announced Measures not leading to reduction of high payback burden



Key priorities to achieve access to innovative medicines



1. Secure adequate Pharma funding across

- 1.1 Increase public pharma funding
- 1.2. Allocate public funding to reduce payback deviation across channels
- 1.3 Differentiate list pricing rules



2. Drive efficiencies within healthcare

- 2.1 Accelerate & Leverage HC Digitalization
- 2.2 Drive the implementation of Screening & Early Diagnosis (eg: LC & CKD)
- 2.3 Establish Biomarkers reimbursement Framework



3. Ensure timely & flawless access

- 3.1 Ensure harmonization of P&R framework with developments of JCA/HTA and EU pharma legislation reform
- 3.2 Abolishment of access obstacles (5/11, submit with provisional pricing)
- 3.3 Drive value -based HTA reforms & HTA org establishment

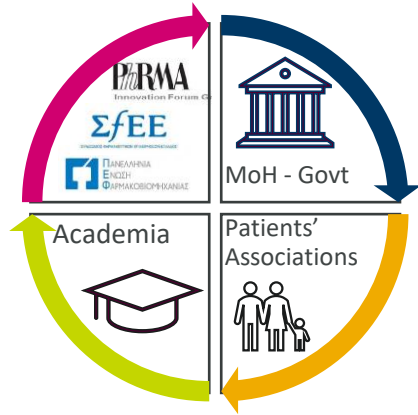


Where we stand- Further Steps Needed

Key Pillar	Goal	Comments
Increase Pub. Pharma Funding	Public Pharma budget increase according to GDP growth	Need for extension beyond 2025 (announced- legislation pending)
Increase Pub. Pharma Funding	Extension of RRF 2025 funds in 2026 and beyond	Announced extension of measure – Not yet legislated
Increase Pub. Pharma Funding	Additional funds that lead in Public Pharma BGT growth HIGHER than the expenditure growth (CLOSE THE GAP)	Announcement of +100 mil € /year will INCREASE paybacks
	TRS	Officially announced measure - Unclear the extent of additional funds
Public Funding Allocation	Rationalize split of additional funds	Decrease the gap between the payback levels across the three pharmaceutical market channels while no deterioration of retail channel payback levels.
Prevention & Early Screening	Prolamvano Initiative	Launched: BC, CC, CRC & CVD Officially Announced: Obesity & Chronic Kidney Disease
Screening	Biomarkers' Reimbursement scheme	Officially Announced- NOT YET implemented
HC Digitalizations	Diagnostic & Therapeutic protocols Dx results fully integrated in ePre Full implementation of ePre in NHS Hospitals Patients Registries & Data Bases Digital Patient Records	Ongoing
Access	EU-HTA Local HTA Org MEA	Ongoing Ongoing



Way Forward:



Ανάγκη ενιαίας μακροχρόνιας φαρμακευτικής πολιτικής βασισμένη στο διάλογο μεταξύ των εμπλεκόμενων φορέων

3yrs Framework Agreement

Χρηματοδότηση που οδηγεί σε
α. Μείωση των συνολικών επιστροφών
β. Σύγκλιση ποσοστών επιστροφών στα κανάλια

Δέσμευση Φαρμακευτικής βιομηχανίας και κυβέρνησης σε κοινούς στόχους



Ενίσχυση πρωτοβουλιών που προωθούν τη συνεργασία μεταξύ επιστημόνων & φορέων του τομέα της Υγείας

Σας ευχαριστώ!

