

EFPIA Patients W.A.I.T. Indicator 2023 Survey

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This year's Patients W.A.I.T. indicator covers 36 countries and includes the full EU27 countries

Indicators measure availability, limited availability and time to local authorisation dates

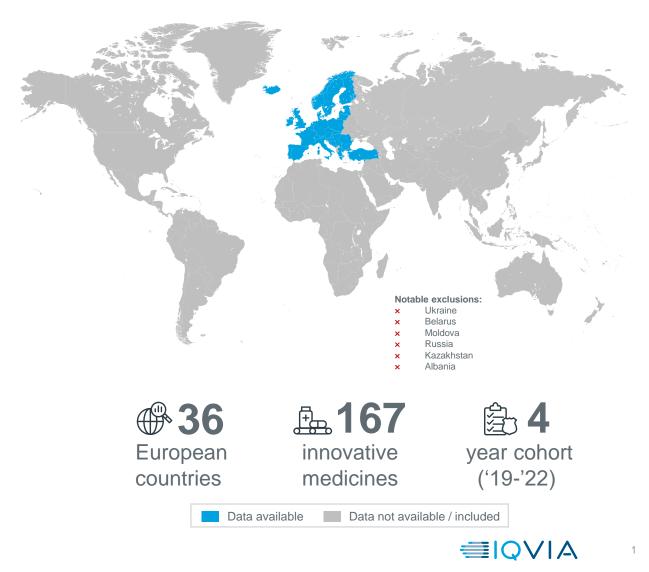
Foreword from the IQVIA project team:

The Patients W.A.I.T. (**W**aiting to **A**ccess Innovative Therapies) Indicator has been running in evolving formats since 2004, and is the largest European study into innovative medicines availability and the time to patient access.

It shows a set of Key Performance Indicators (KPIs) on the European access environment for innovative medicines across 5 cohorts of medicines (all medicines, oncology, orphan medicines, non-oncology orphan medicines, and combination therapies) to show how different segments of the market are prioritised and how the market access landscape varies.

The charts in the following report includes data on 36 countries (27 EU, and 9 non-EU), giving a full European picture of availability. Information on the 167 innovative medicines with central-marketing authorisation between 2019 and 2022 are included, with the study running on a one year delay to permit countries to include these medicines on their public reimbursement list, meaning that the data on availability is accurate as of *January 5th 2024*. This period is therefore inclusive of the COVID-19 pandemic. Although no significant impact is noted in the indicator, the continued impact on launch has been shown through other studies.

Local pharmaceutical industry associations provide the information directly to IQVIA and EFPIA, and their methods are included within the appendix to ensure full transparency to the study.



2023 WAIT indicator: 7 KPIs for 5 cohorts of medicines





EU average rate of availability in 2023 vs 45% in the previous study Average time for a new medicine to be available in European market is 14 days longer than the previous study

(~) 531

Access gap between the highest and lowest country is **84%** in the 4-year cohort, and **80%** for longer timelines



Data coverage

Full data coverage for 31 out of the 36 countries included

Study composition Includes a fewer combination products

than the previous study

Rt

Limited availability

40% of available medicines are granted limited availability

Access disparities

persist between Northern/Western and Southern/Eastern European countries

Oncology medicines

take the longest time to reimburse across all studied segments





Contents Click on hyperlinks for navigation to specific indicators

+ Study summary

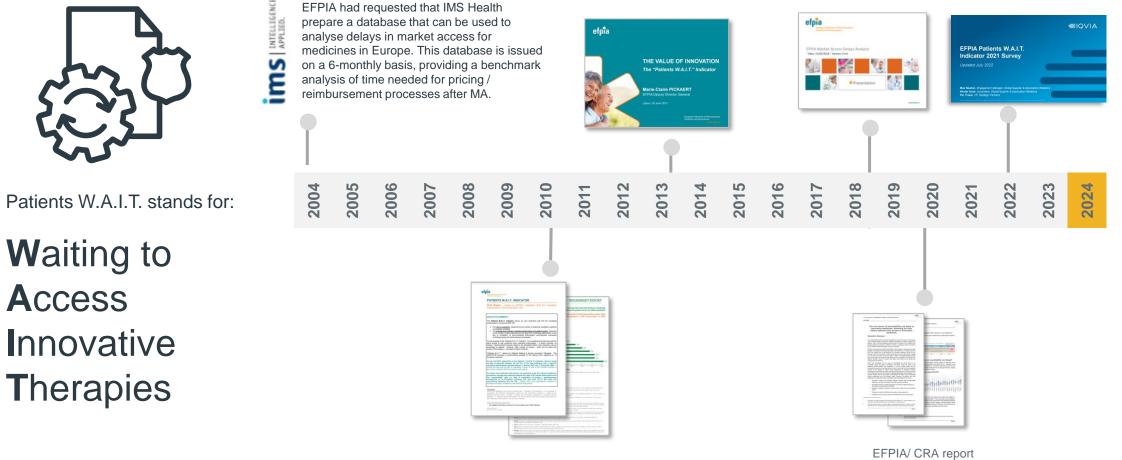
+ The Patients W.A.I.T. indicators

- 1. Overview (all products)
- 2. Oncology medicines
- 3. Orphan medicines
- 4. Non-oncology orphan medicines
- 5. <u>Combination therapies</u>
- 6. Historic comparisons and extended period
- + Appendix & detailed methodology



Patients W.A.I.T. survey has evolved, and is entering its 20th year

The indicator long-running, and one of the largest datasets on medicines availability in Europe



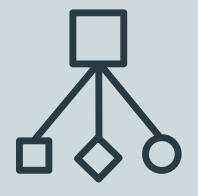
on root causes

Sources include: https://www.efpia.eu/media/412416/market-access-delays-2017-final-140318.pdf; https://studylib.net/doc/7634123/patients--w.a.i.t.-indicator---report-201 https://www.efpia.eu/publications/downloads/efpia/efpia-patients-wait-indicator-2019-survev/: https://www.efpia.eu/publications/downloads/efpia/efpia-patients-wait-indicator-2019-survev/: https://www.efpia.eu/publications/downloads/efpia/efpia-patients-wait-indicator-2019-survev/: https://www.efpia.eu/publications/downloads/efpia/efpia-patients-wait-indicator-2019-survev/: https://www.efpia.eu/publications/downloads/efpia/efpia-patients-wait-indicator-2019-survev/: https://www.efpia.eu/publications/downloads/efpia/efpia-patients-wait-indicator-2019-survev/: https://www.efpia.eu/publications/downloads/efpia/efpia-patients-wait-indicator-2019-survev/: https://www.efpia.eu/publications/downloads/efpia/efpia https://www.efpia.eu/media/s4qf1eqo/efpia_patient_wait_indicator_final_report.pdf

Access

The study is based on the core concept of "availability"

Definition of availability



In this study the term 'availability' is used throughout to permit standardised measurement across 36 healthcare systems

Inclusion of a centrallyapproved medicine on the public reimbursement list in a country

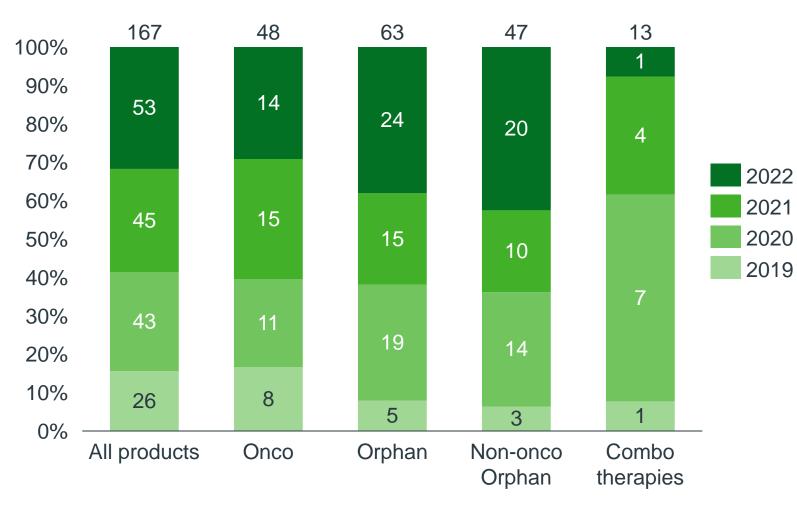
Where appropriate it takes into consideration things like managed entry agreements, line-of-therapy or formulary restrictions. However, it does not have a correlation to the use / uptake of the medicines.

Country-specific nuances should be discussed with the local associations or EFPIA directly to ensure correct interpretation of the data, please see the appendix for further details.



Study composition

By year of marketing authorisation



Definitions:

- Products with central marketing authorisation, sourced from EMA EPARs (last accessed November 2023)
- Orphan status from EMA on orphan medical products (OMP) status
- Oncology products flagged using IQVIA MIDAS Oncology market definition: L1 & L2 & V3C & Revlimid & Xgeva & Proleukin & Pomalyst
- Combination products include any product with more than one molecule, including branded / generic combinations in fixed doses.



Study summary

Full methodology and definitions by country are available in the appendix of the report

Core metrics

The Patients W.A.I.T. Indicator shows 2 main metrics for new medicines (i.e. medicines including a substance not previously available in Europe) within a 4 year rolling cohort:

1.) Rate of availability, measured by the number of medicines available to patients in European countries. For most countries this is the point at which the product gains access to the reimbursement list (this does not necessarily indicate uptake / usage).

2.) The time to availability*, measuring the average time between marketing authorisation and availability, using days from the date of marketing authorisation to the day of completion of post-marketing authorisation administrative processes (whether it is attributable to companies or competent authorities).

| Description | Status | |
|--|-----------------------------|--|
| Full reimbursement through a national reimbursement system | Available | |
| Full automatic reimbursement by a hospital budget (e.g. Nordic system) | | |
| Limited reimbursement to specific subpopulations of approved indication | Available (marked LA^) | |
| Limited reimbursement on a national named patient basis (individual patient) | | |
| Limited reimbursement while decision is pending (where system permits) | | |
| Availability through a special program (e.g. managed entry agreements) | | |
| Available only within the private market at the patients expense | Only privately available | |
| Not reimbursed, or not reimbursed while awaiting decision | Not available | |

Availability definition

Notes and caveats

Source of information: EFPIA member associations, who either refer to information available from official sources, gather the information directly from member companies or in some cases use IQVIA sales data.

Local marketing exceptions: Countries where local marketing authorisation dates are used to calculate the time to availability are: Bosnia and Herzegovina, England, North Macedonia, Scotland, Serbia, Switzerland and Turkey.

Completeness: Some country associations did not submit full datasets. Countries with substantially limited data sets are: Bosnia (53% complete), Croatia (63% complete), Cyprus (77% complete), and North Macedonia (66% complete). This is noted on slides with an asterisk (*). One country (Italy) submitted 98% dataset, which is not considered substantially limited.

Average calculations: The EU averages noted throughout are averages for the 27 countries in the European Union. This is the third year that Cyprus, Malta, and Luxembourg have participated in the study.

* The Patients W.A.I.T. Indicator is not a measurement of the delays as defined in the "Transparency" Directive (directive 89/105/EEC). Delays under the "Transparency" Directive reflect the number of days that national competent authorities need to make their decisions regarding price and inclusion of medicines in the positive list, where applicable. These delays do not include the time needed to prepare submissions under relevant national regulations, which may also include clock-stops for supply of additional information during the process; neither do "Transparency" Directive delays include time required to complete other formalities before a new medicine can be made available in a given country. A LA = Limited Availability



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1. Overview (all products)

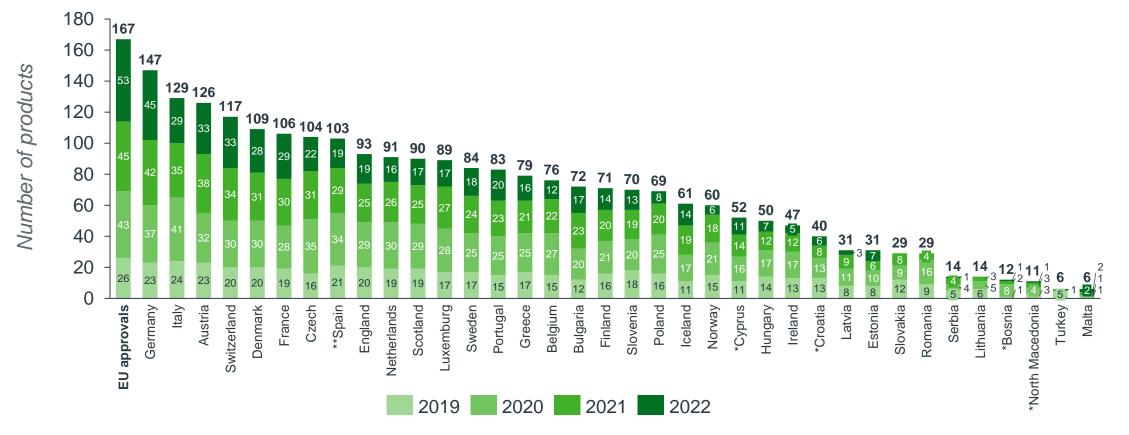
Indicators:

- 1.1. Total availability by approval year
- 1.2. Rate of availability
- 1.3. Rate of full availability
- 1.4. Breakdown of availability
- 1.5. Time from central approval to availability
- 1.6. Time to availability
- 1.7. Median time to availability



Total availability by approval year (2019-2022)

The **total availability by approval year** is the number of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]), split by the year the product received marketing authorisation in Europe.



European Union average: 72 products available (43%) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. Country-specific nuances are listed in the appendix. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

9

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Rate of availability (2019-2022)

The **rate of availability**, measured by the number of medicines available to patients in European countries as of 5th January 2024. For most countries this is the point at which the product gains access to the reimbursement list[†], including products with limited availability.

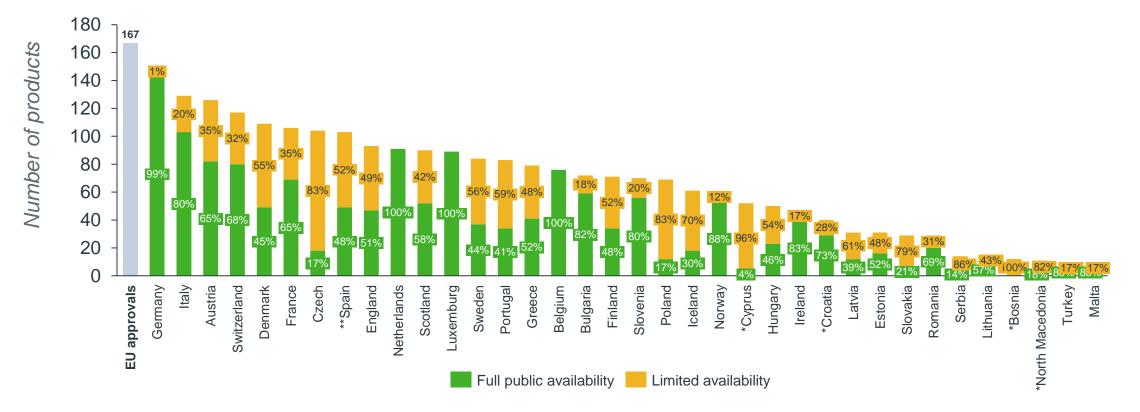


European Union average: 72 products available (43%) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations



Rate of full availability (%, 2019-2022)

The **rate of full availability** shows the proportion of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]) without any restrictions to the patient population, or through named patient basis schemes which have increased significantly in recent years and were not always captured in survey submissions.

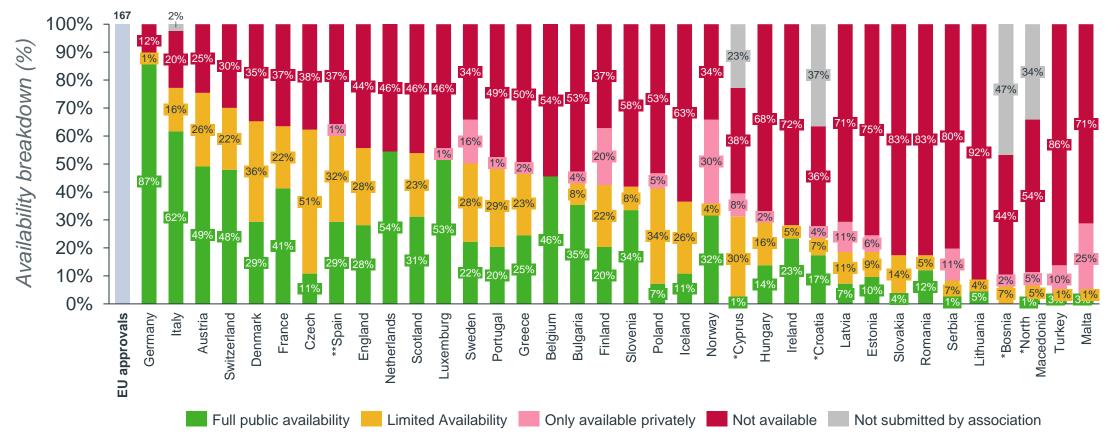


European Union average: 72 products available (43%), Limited Availability (40% of available products) Netherlands did not submit complete information on restrictions to available medicines meaning LA* is not captured in these countries. [†]In most countries' availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

11

Breakdown of availability (%, 2019-2022)

The **breakdown of availability** is the composition of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]). This includes all medicine's status to provide a complete picture of the availability of the cohort studied.

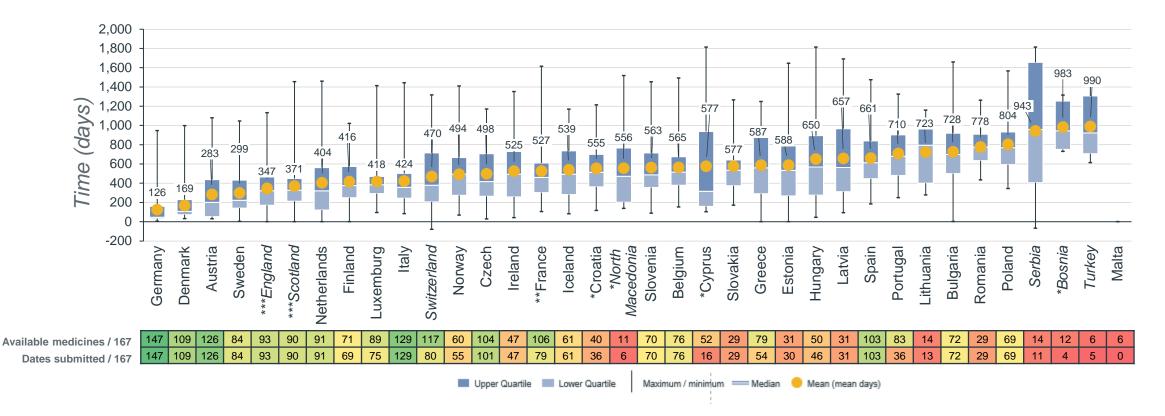


European Union average: 72 products available (43%), Limited Availability (16% of all products) Netherlands did not submit complete information on restrictions to available medicines meaning LA* is not captured in these countries. [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

12

Time from central approval to availability (2019-2022)

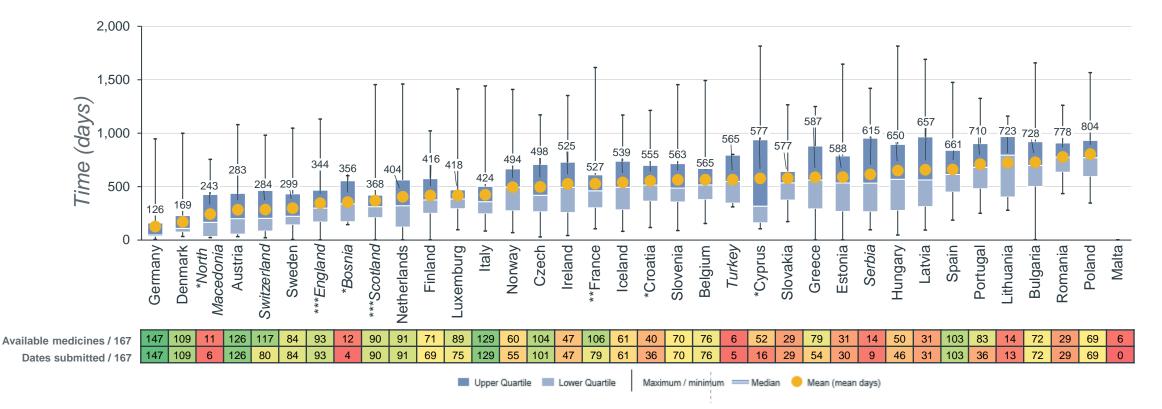
The time from central approval to availability is the days between marketing authorisation and the date of availability to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation throughout.



European Union average: 531 days (mean %) (Note: Malta is not included in EU27 average as no dates were submitted in total) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative **For France, the time to availability (527 days, n=79 dates submitted) includes products under the Accès précoce system (n=18 dates submitted) for which the price negotiation process is usually longer. If one considers that products under the Accès précoce system are directly availability = 0), the average time to availability is 424 days. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines.

Time to availability (2019-2022)

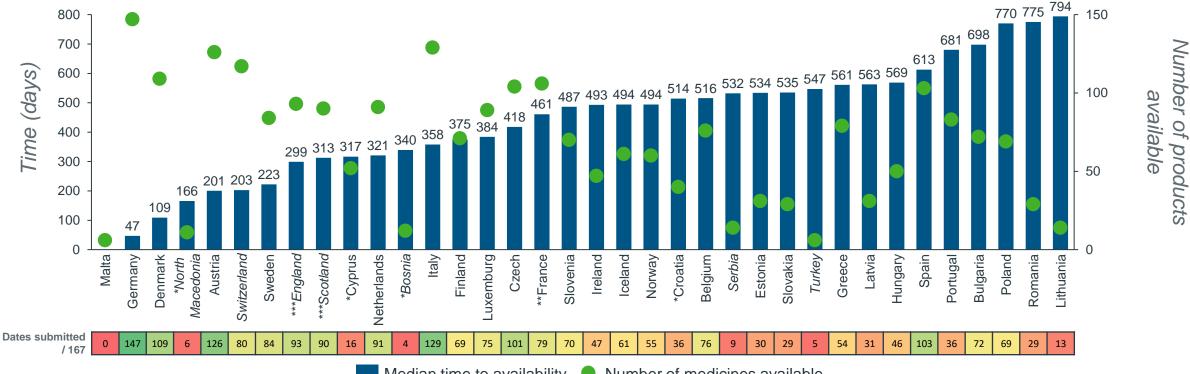
The **time to availability** is the days between marketing authorisation and the date of availability to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation in most countries, except for countries shown in italics where local authorisation dates have been used. Data is correct to 5th January 2024.



European Union average: 531 days (mean %) (Note: Malta is not included in EU27 average as no dates were submitted in total) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative **For France, the time to availability (527 days, n=79 dates submitted) includes products under the Accès précoce system (n=18 dates submitted) for which the price negotiation process is usually longer. If one considers that products under the Accès précoce system are directly availability = 0), the average time to availability is 424 days. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products

Median time to availability (2019-2022)

The median time to availability is the days between marketing authorisation and the date of availability to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation in most countries, except for countries shown in italics where local authorisation dates have been used. Data is correct to 5th January 2024.



Median time to availability 🛛 Number of medicines available

European Union average: 474 days (median) (Note: Malta is not included in EU27 average as no dates were submitted in total) †In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative **For France, the median time to availability (461 days, n=79 dates submitted) includes products under the Accès précoce system (n=18 dates submitted) for which the price negotiation process is usually longer. If one considers that products under the Accès précoce system are directly available (time to availability = 0), the median time to availability is 383 days. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products

Key observations

Executive summary (EU27 averages)

| Measure | All products | Oncology | Orphan | Non-oncologic orphan | Combination therapy |
|------------------------------|-----------------------------|--|---------------------------------------|-----------------------------------|---|
| Average rate of availability | 43% (45% in 2022) | 52% (50% in 2022) | 35% (39% in 2022) | 32% (39% in 2022) | 54% (50% in 2022) |
| Average time to availability | | 559 1 Days (526 days in 2022) | 542 Days (625 days in 2022) | 530 Days (626 days in 2022) | 433 Days (426 days in 2022) |

Key Insights

Rate of availability

- Patient access to innovative products in Europe is highly variable, with >80% variance between Northern/Western countries and Southern/Eastern European countries
- Europe's average rate of availability has marginally deteriorated versus last year

Time to availability

- The average delay from marketing authorisation to patient access can vary by a factor greater than 7x in Europe, from as little as 4 months to 31 months (~2.5 years)
- Even within a country there is a large variation in the speed of patient access to different products. Often the level of variation within a country is greater than between countries
- Many countries with low data availability appear high in the indicator, but it is important to take into account the small number of available medicines that the figure represents



Metrics key:

Text colour indicates relative position versus the current (2023) EU average (*significantly worse than current EU average / significantly better than current EU average*)

Arrow colour indicates significant changes versus the previous (2021) EU average (significant improvement versus previous year <code>1↓</code> / significant deterioration versus prior year <code>1↓</code>)

Average calculations:

Only a difference of +/- 5% (~30 days) is considered a significant change and therefore highlighted

Malta is not included in EU27 average for time to availability as no dates were submitted in total





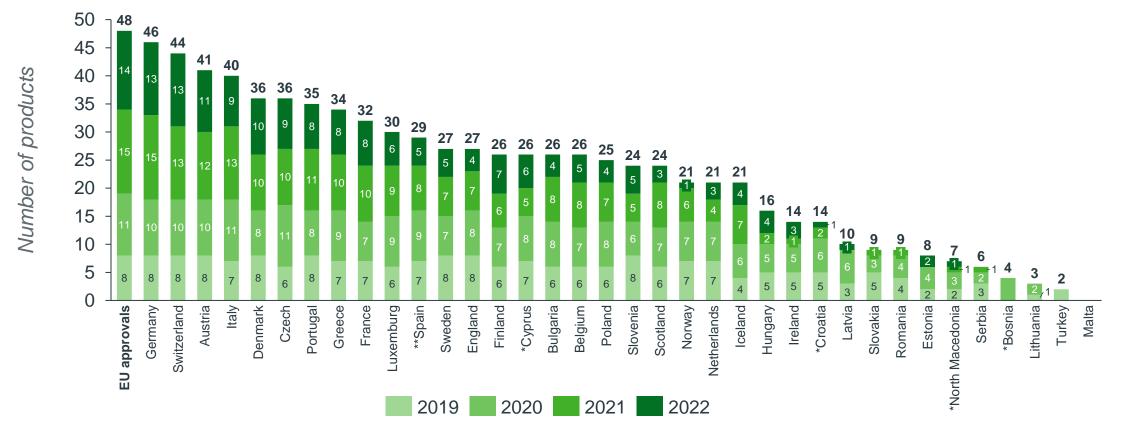
2. Oncology medicines

Indicators:

2.1. Total availability by approval year
2.2. Rate of availability
2.3. Rate of full availability
2.4. Breakdown of availability
2.5. Time to availability
2.6. Median time to availability

Oncology availability by approval year (2019-2022)

The **total availability by approval year** is the number of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]), split by the year the product received marketing authorisation in Europe.



European Union average: 25 products available (52%) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations



Oncology rate of availability (2019-2022)

The **rate of availability**, measured by the number of medicines available to patients in European countries as of 5th January 2024. For most countries this is the point at which the product gains access to the reimbursement list[†], including products with limited availability.



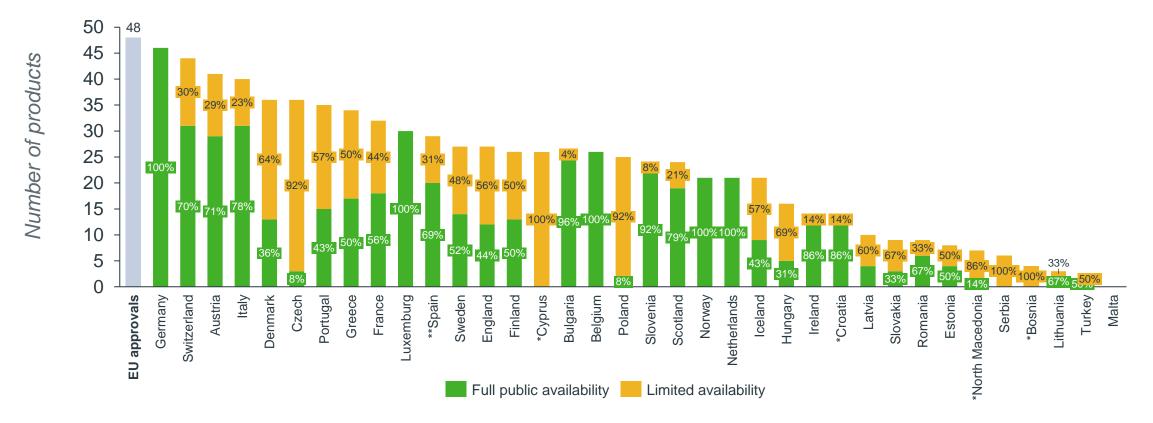
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19

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Oncology rate of full availability (%, 2019-2022)

The **rate of full availability** shows the proportion of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]) without any restrictions to the patient population, or through named patient basis schemes which have increased significantly in recent years and were not always captured in survey submissions.

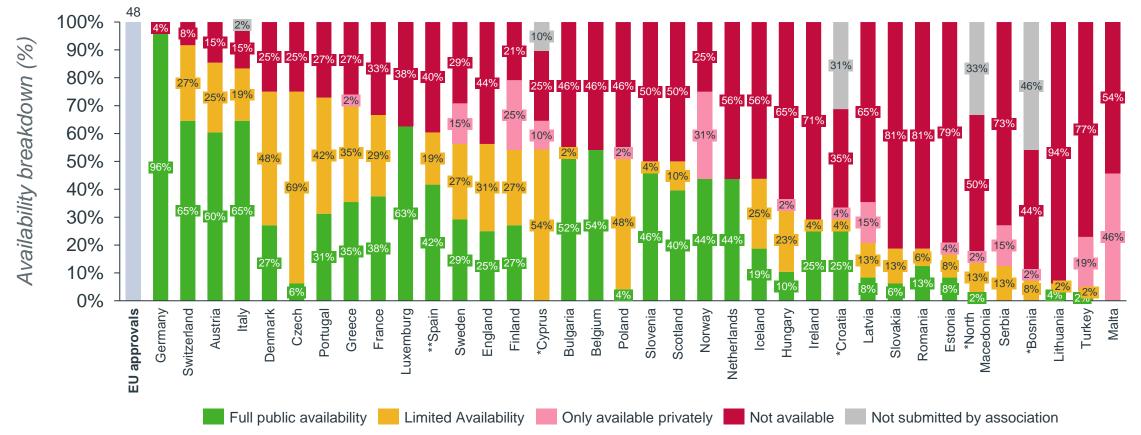


European Union average: 25 products available (52%), Limited availability (40% of available products). Netherlands did not submit complete information on restrictions to available medicines meaning LA* is not captured in these countries. [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

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Oncology breakdown of availability (%, 2019-2022)

The **breakdown of availability** is the composition of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]). This includes all medicine's status to provide a complete picture of the availability of the cohort studied.

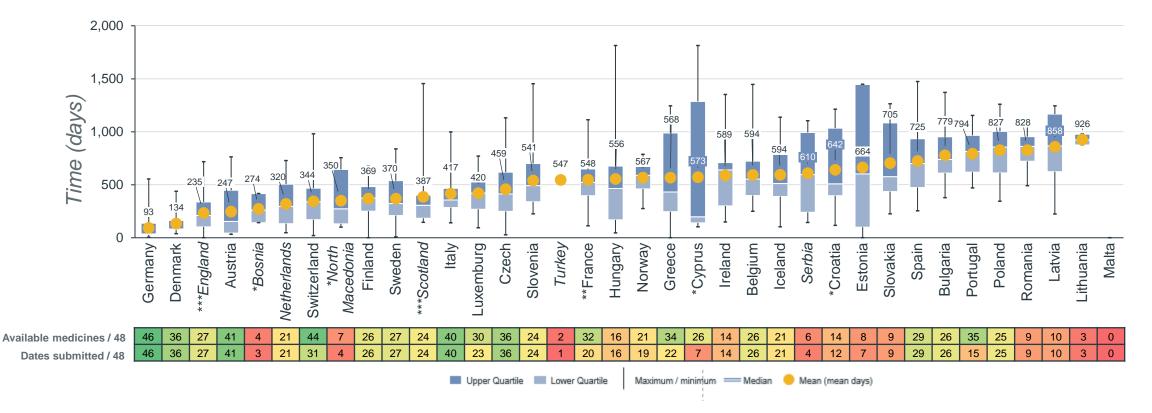


European Union average: 25 products available (52%), Limited availability (19% of all oncology products). Netherlands did not submit complete information on restrictions to available medicines meaning LA* is not captured in these countries. [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

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Oncology time to availability (2019-2022)

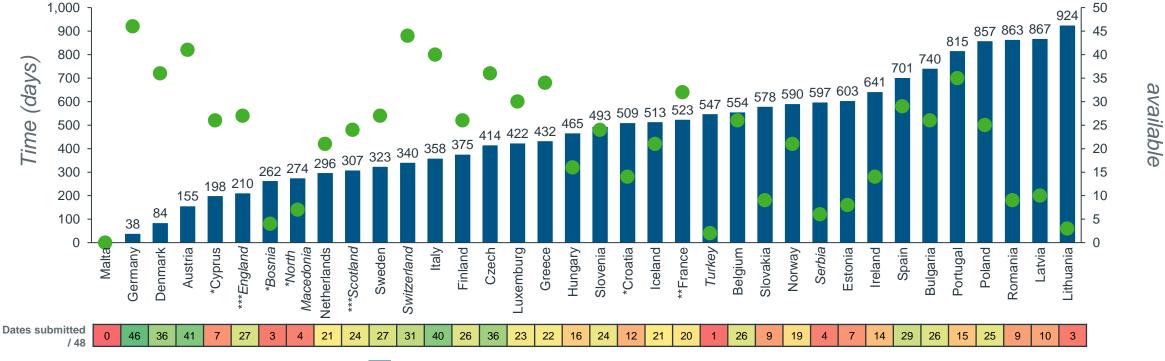
The **time to availability** is the days between marketing authorisation and the date of availability to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation in most countries, except for countries shown in italics where local authorisation dates have been used. Data is correct to 5th January 2024.



European Union average: 559 days (mean) (Note: Malta is not included in EU27 average as no dates were submitted in total) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. unrepresentative **For France, the time to availability (548 days, n=20 dates submitted) includes products under the Accès précoce system (n=5 dates submitted) for which the price negotiation process is usually longer. If one considers that products under the Accès précoce system are directly available (time to availability = 0), the average time to availability is 438 days. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products

Oncology median time to availability (2019-2022)

The **median time to availability** is the days between marketing authorisation and the date of availability to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation in most countries, except for countries shown in italics where local authorisation dates have been used. Data is correct to 5th January 2024.



Median time to availability 🛛 🗧 Number of medicines available

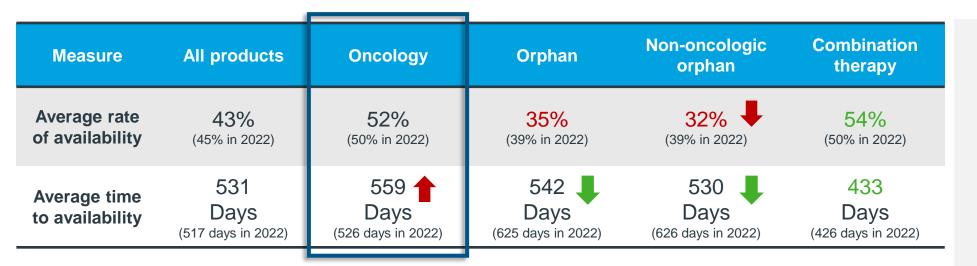
European Union average: 509 days (median) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative **For France, the median time to availability (523 days, n=20 dates submitted) includes products under the Accès précoce system (n=5 dates submitted) for which the price negotiation process is usually longer. If one considers that products under the Accès précoce system are directly available (time to availability = 0), the median time to availability is 443 days. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products



Number of products

Key observations

Executive summary (EU27 averages)



Key Insights

Rate of availability

- The EU's rate of availability for oncology medicines was 9% higher than the average rate of availability for all products in 2023
 - Four countries (DE, CH, AT, IT) have a rate of availability for oncology medicines higher than 80% in 2023

Time to availability

- The average delay from marketing authorisation to patient access for oncology products varies from 3 to 31 months (>2.5 years) between all countries included in the 2023 WAIT survey
- The average time to availability for oncology products is 33 days slower than comparable data published in the 2022 report



Metrics key:

Text colour indicates relative position versus the current (2023) EU average (*significantly worse than current EU average / significantly better than current EU average*)

Arrow colour indicates significant changes versus the previous (2021) EU average (significant improvement versus previous year **1**, significant deterioration versus prior year **1**,

Average calculations:

Only a difference of +/- 5% (~30 days) is considered a significant change and therefore highlighted

Malta is not included in EU27 average for time to availability as no dates were submitted in total





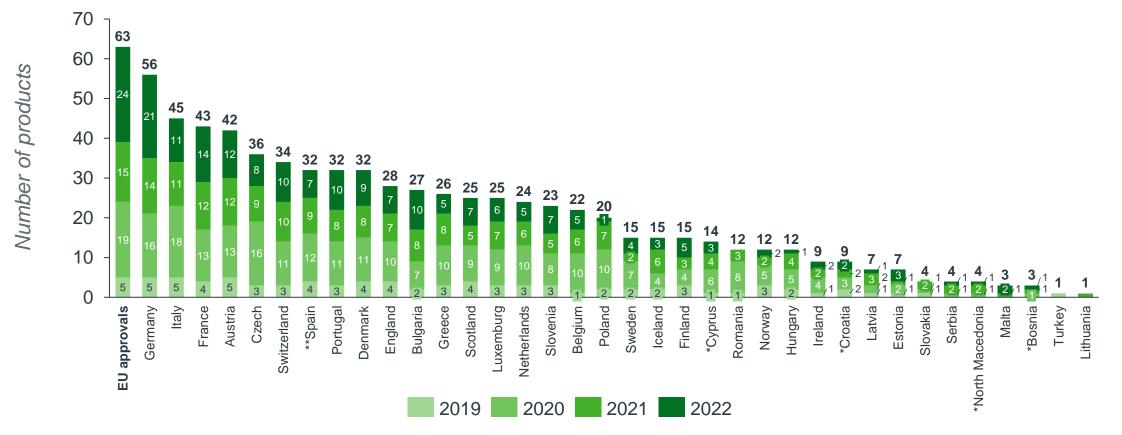
3. Orphan medicines

Indicators:

3.1. Total availability by approval year
3.2. Rate of availability
3.3. Rate of full availability
3.4. Breakdown of availability
3.5. Time to availability
3.6. Median time to availability

Orphan availability by approval year (2019-2022)

The **total availability by approval year** is the number of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]), split by the year the product received marketing authorisation in Europe.



European Union average: 22 products available (35%) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

26

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Orphan rate of availability (2019-2022)

The **rate of availability**, measured by the number of medicines available to patients in European countries as of 5th January 2024. For most countries this is the point at which the product gains access to the reimbursement list[†], including products with limited availability.

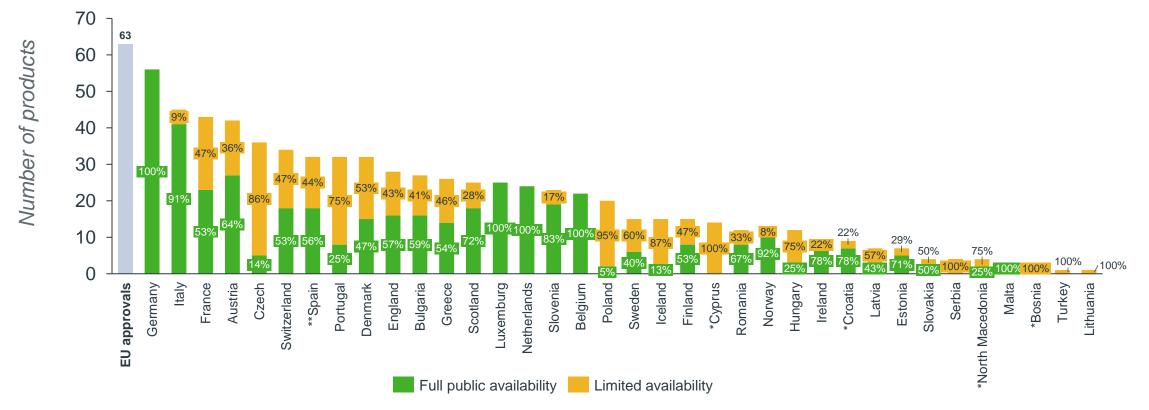


European Union average: 22 products available (35%) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations



Orphan rate of full availability (%, 2019-2022)

The **rate of full availability** shows the proportion of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]) without any restrictions to the patient population, or through named patient basis schemes which have increased significantly in recent years and were not always captured in survey submissions.



European Union average: 22 products available (35%), Limited availability (42% of available products). Netherlands did not submit complete information on restrictions to available medicines meaning LA* is not captured in these countries. [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

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Orphan rate of availability (%, 2019-2022)

The **breakdown of availability** is the composition of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]). This includes all medicine's status to provide a complete picture of the availability of the cohort studied.

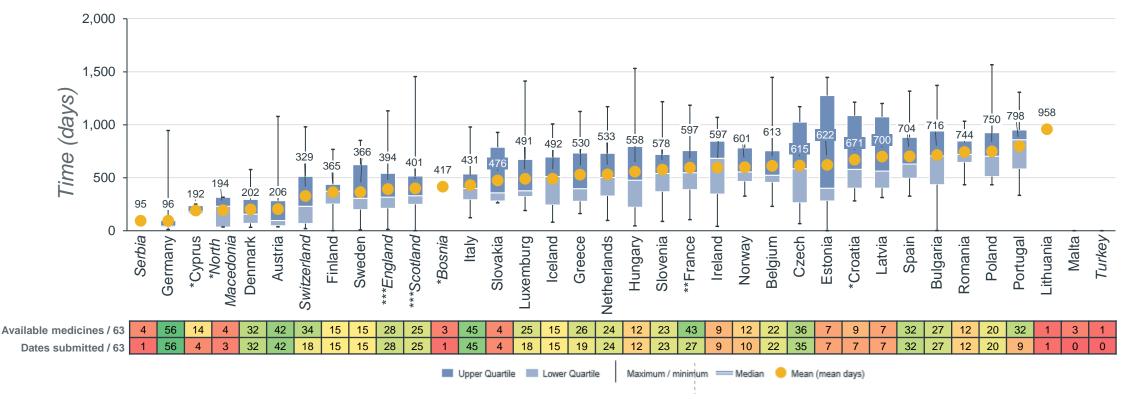


European Union average: 22 products available (35%), Limited availability (13% of all orphan products). Netherlands did not submit complete information on restrictions to available medicines meaning LA* is not captured in these countries. [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

29

Orphan time to availability (2019-2022)

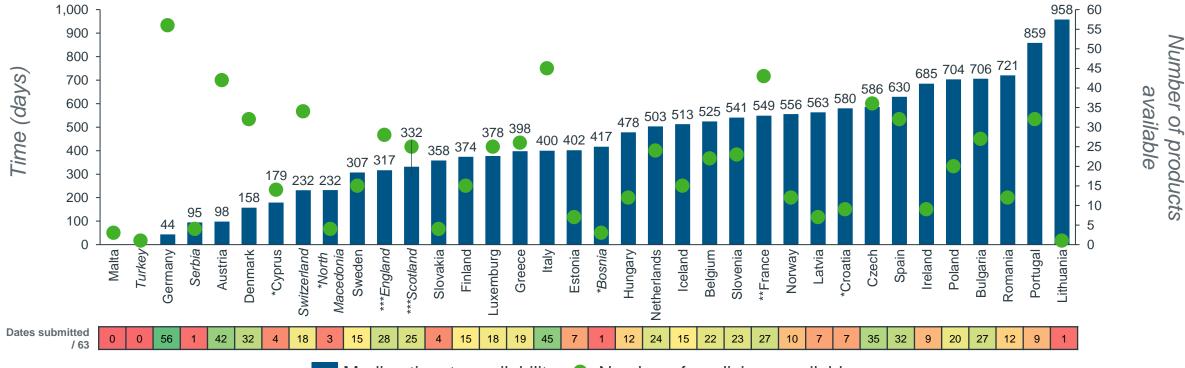
The **time to availability** is the days between marketing authorisation and the date of availability to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation in most countries, except for countries shown in italics where local authorisation dates have been used. Data is correct to 5th January 2024.



European Union average: 542 days (mean) (Note: Malta is not included in EU27 average as no dates were submitted in total) ¹In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative.; **For France, the time to availability (597 days, n=27 dates submitted) includes products under the Accès précoce system (n=11 dates submitted) for which the price negotiation process is usually longer. If one considers that products under the Accès précoce system are directly available (time to availability = 0), the average time to availability is 420 days. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products

Orphan median time to availability (2019-2022)

The median time to availability is the days between marketing authorisation and the date of availability to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation in most countries, except for countries shown in italics where local authorisation dates have been used. Data is correct to 5th January 2024.



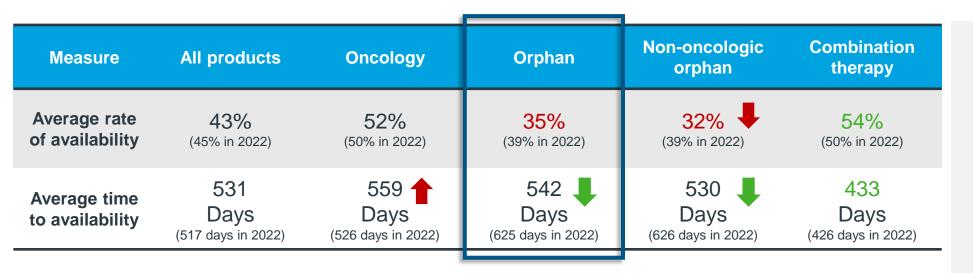
Median time to availability 🛛 🔍 Number of medicines available

European Union average: 488 days (median) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be **For France, the median time to availability (549 days, n=27 dates submitted) includes products under the Accès précoce system (n=11 dates submitted) for which the price negotiation process is usually longer. If one considers that products under the Accès précoce system are directly available (time to availability = 0), the median time to availability is 445 days. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products

31

Key observations

Executive summary (EU27 averages)



Key Insights

Rate of availability

- Average rate of availability for orphan medicines is 8% lower than the average for all products
- The rate of availability for orphan medicines in 2023 is 35%, which represents a 4% decline since last year's survey

Time to availability

- The average time to availability for orphan products is significantly faster than last year's study, which reflects a change in product composition
- The average delay between market authorisation and patient availability for orphan drugs can be as short as 3 months in some countries or as long as 2.5 years for others



Metrics key:

Text colour indicates relative position versus the current (2023) EU average (*significantly worse than current EU average / significantly better than current EU average*)

Arrow colour indicates significant changes versus the previous (2021) EU average (significant improvement versus previous year **1**, significant deterioration versus prior year **1**,

Average calculations:

Only a difference of +/- 5% (~30 days) is considered a significant change and therefore highlighted

Malta is not included in EU27 average for time to availability as no dates were submitted in total





4. Non-oncology orphan medicines

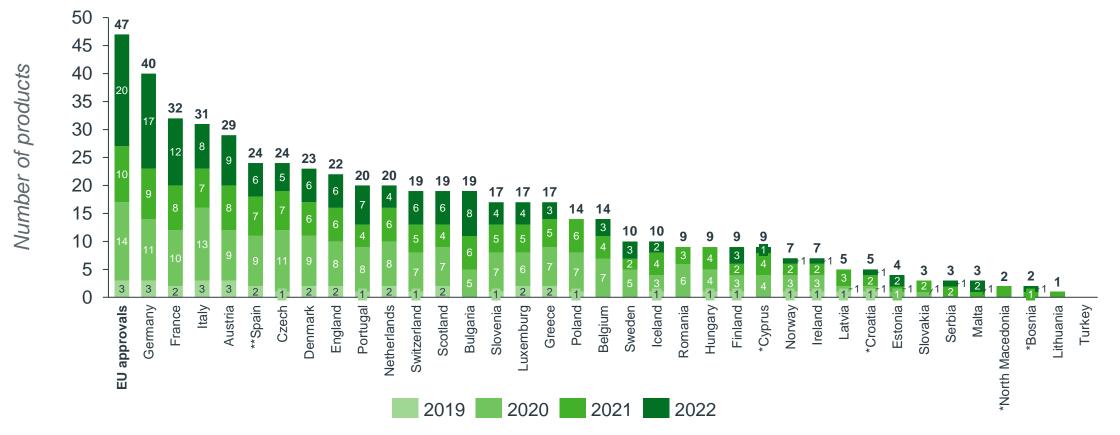
Indicators:

- 4.1. Total availability by approval year4.2. Rate of availability4.3. Rate of full availability
- 4.4. Breakdown of availability
- *4.5.* Time to availability
- 4.6. Median time to availability



Non-oncology orphan availability by approval year (2019-2022)

The **total availability by approval year** is the number of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]), split by the year the product received marketing authorisation in Europe.

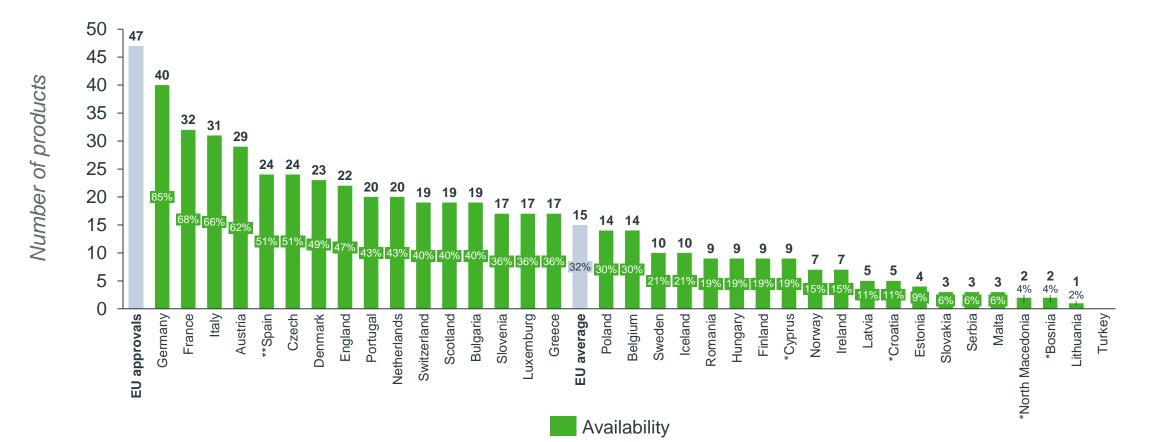


European Union average: 15 products available (32%) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

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Non-oncology orphan rate of availability (2019-2022)

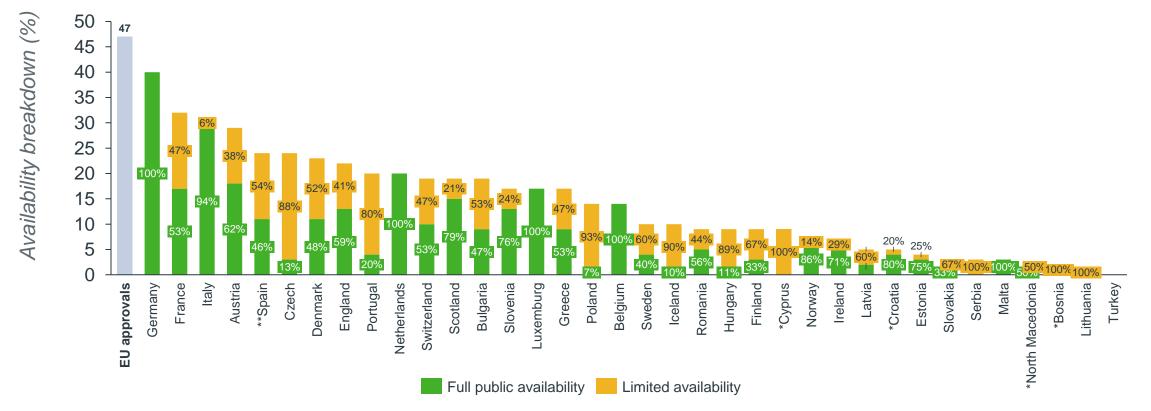
The **rate of availability**, measured by the number of medicines available to patients in European countries as of 5th January 2024. For most countries this is the point at which the product gains access to the reimbursement list[†], including products with limited availability.



European Union average: 15 products available (32%)[†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

Non-oncology orphan rate of full availability (%, 2019-2022)

The **rate of full availability** shows the proportion of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]) without any restrictions to the patient population, or through named patient basis schemes which have increased significantly in recent years and were not always captured in survey submissions.

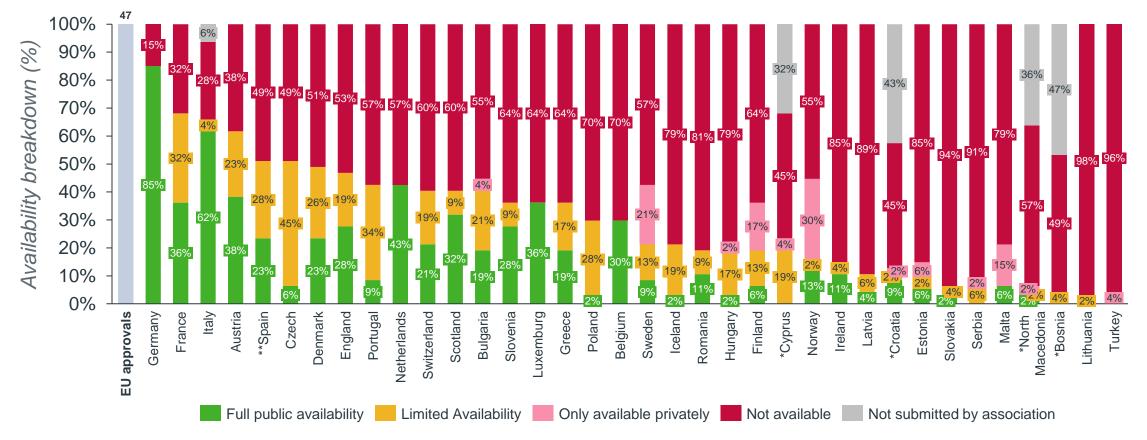


European Union average: 15 products available (32%). Limited availability (46% of available products) Netherlands did not submit complete information on restrictions to available medicines meaning LA* is not captured in these countries. [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

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Non-oncology orphan breakdown of availability (%, 2019-2022)

The **breakdown of availability** is the composition of medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]). This includes all medicine's status to provide a complete picture of the availability of the cohort studied.

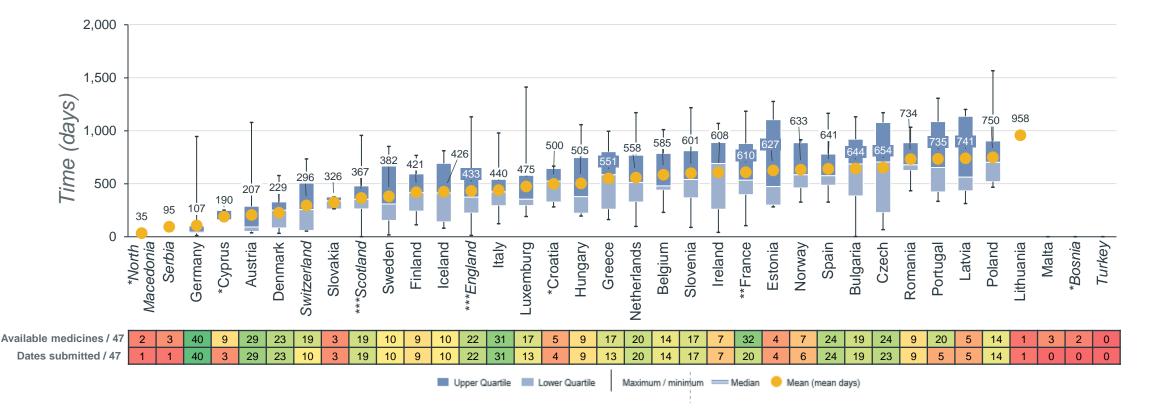


European Union average: 15 products available (32%), Limited availability (13% of all non-onc orphan products). Netherlands did not submit complete information on restrictions to available medicines meaning LA* is not captured in these countries. ¹In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations



Non-oncology orphan time to availability (2019-2022)

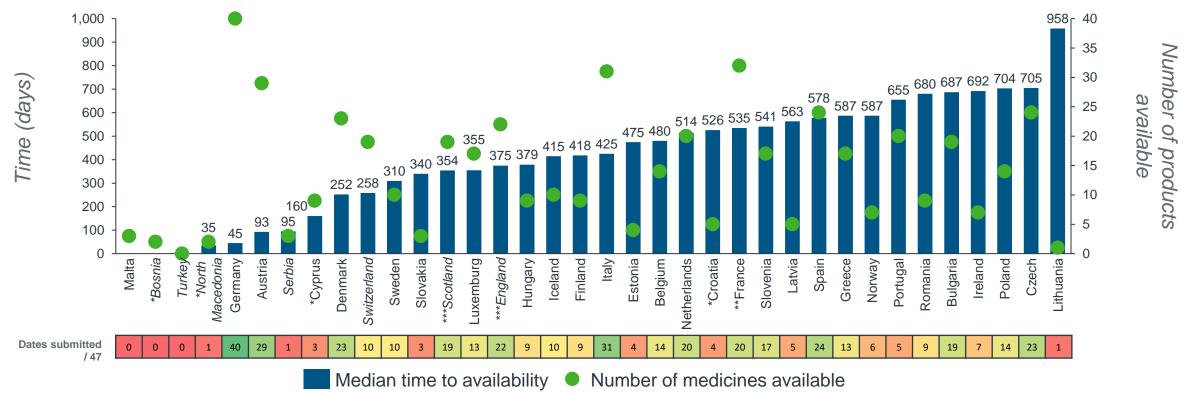
The **time to availability** is the days between marketing authorisation and the date of availability to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation in most countries, except for countries shown in italics where local authorisation dates have been used. Data is correct to 5th January 2024.



European Union average: 530 days (mean) (Note: Malta is not included in EU27 average as no dates were submitted in total) ¹In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative, **For France, the time to availability (610 days, n=20 dates submitted) includes products under the Accès précoce system (n=10 dates submitted) for which the price negotiation process is usually longer. If one considers that products under the Accès précoce system are directly available (time to availability = 0), the average time to availability is 401 day. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products

Non-oncology orphan median time to availability (2019-2022)

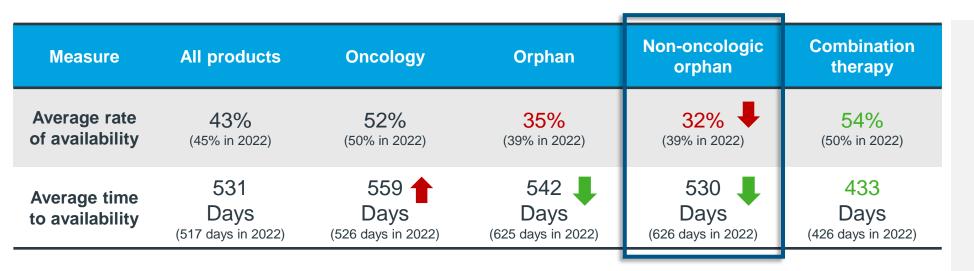
The **median time to availability** is the days between marketing authorisation and the date of availability to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation in most countries, except for countries shown in italics where local authorisation dates have been used. Data is correct to 5th January 2024.



European Union average: 487 days (median) ¹In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative **For France, the median time to availability (535 days, n=20 dates submitted) includes products under the Accès précoce system (n=10 dates submitted) for which the price negotiation process is usually longer. If one considers that products under the Accès précoce system are directly available (time to availability = 0), the median time to availability is 382 day. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products

Key observations

Executive summary (EU27 averages)



Key Insights

Rate of availability

- Average rate of availability for non-oncology orphan medicines is 11% lower than the average for all products
- The rate of availability for non-oncology orphan medicines in 2023 is 32%, which represents a 7% decline since last year's survey

Time to availability

- The average time to availability for non-oncology orphan products is in line with the average for all products, making it one of the segments with the fastest time to availability
- Europe's time to availability for non-oncology orphan drugs can vary from less than 3 months to over 31 months



Metrics key:

Text colour indicates relative position versus the current (2023) EU average (*significantly worse than current EU average / significantly better than current EU average*)

Arrow colour indicates significant changes versus the previous (2021) EU average (significant improvement versus previous year **1**, significant deterioration versus prior year **1**,

Average calculations:

Only a difference of +/- 5% (~30 days) is considered a significant change and therefore highlighted

Malta is not included in EU27 average for time to availability as no dates were submitted in total





5. Combination therapies

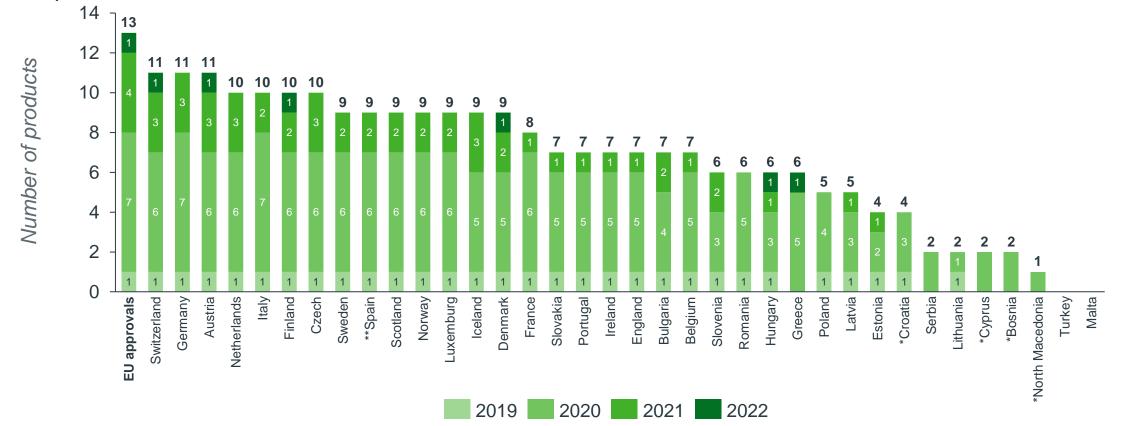
Indicators:

5.1. Total availability by approval year
5.2. Rate of availability
5.3. Rate of full availability
5.4. Breakdown of availability
5.5. Time to availability
5.6. Median time to availability



Combination therapies availability by approval year (2019-2022)

The **total availability by approval year** is the number of fixed dose combination medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]), split by the year the product received marketing authorisation in Europe.

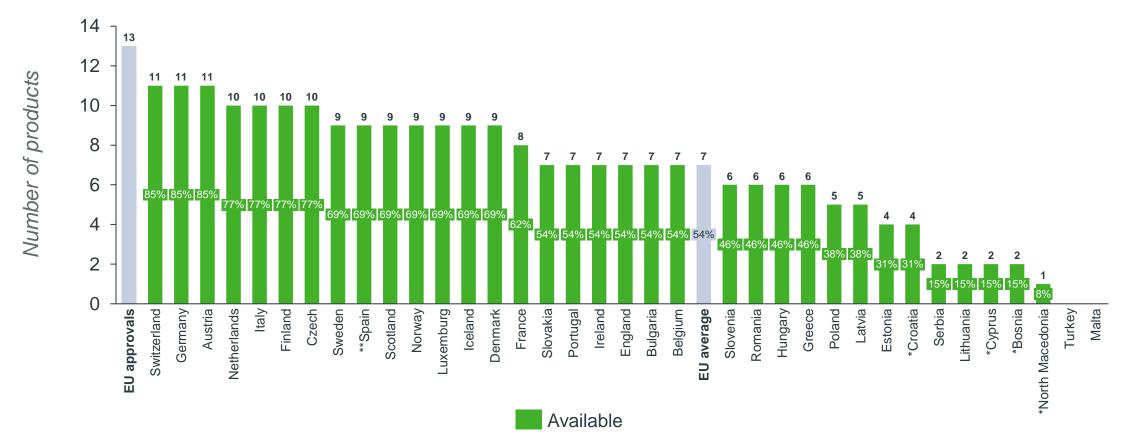


European Union average: 7 products available (54%) Combination products can include innovative branded / generic combinations. [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

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Combination therapies rate of availability (2019-2022)

The **rate of availability**, measured by the number of fixed dose combination medicines available to patients in European countries as of 5th January 2024. For most countries this is the point at which the product gains access to the reimbursement list[†], including products with limited availability.

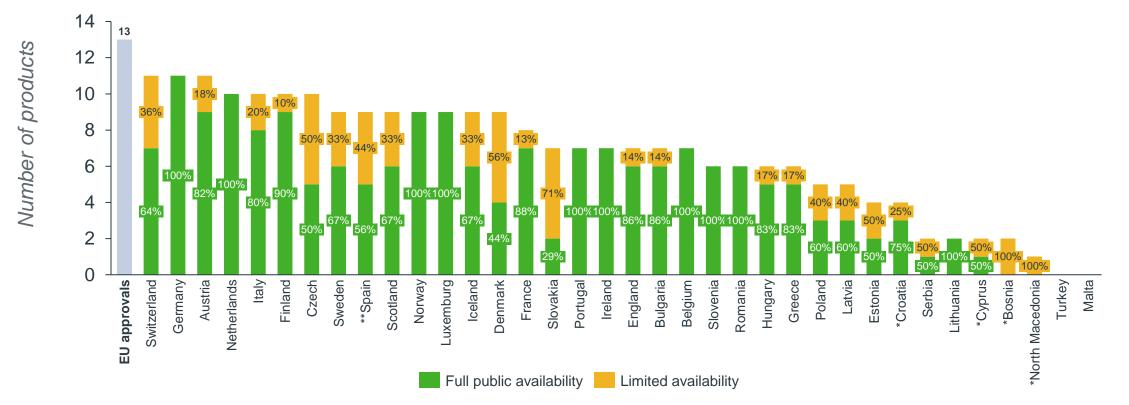


European Union average: 7 products available (54%) Combination products can include innovative branded / generic combinations; [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

43

Combination therapies rate of full availability (%, 2019-2022)

The **rate of full availability** shows the proportion of fixed dose combination medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]) without any restrictions to the patient population, or through named patient basis schemes which have increased significantly in recent years and were not always captured in survey submissions.



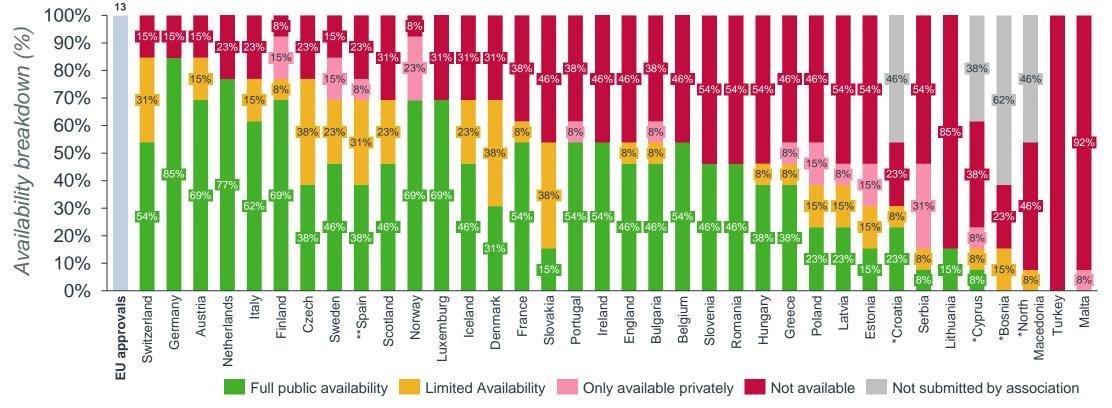
European Union average: 7 products available (54%), Limited availability (22% of available products). Combination products can include innovative branded / generic combinations; Netherlands did not submit complete information on restrictions to available medicines meaning LA* is not captured in these countries.¹In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

44

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Combination therapies breakdown of availability (%, 2019-2022)

The **breakdown of availability** is the composition of fixed dose combination medicines available to patients in European countries as of 5th January 2024 (for most countries this is the point at which the product gains access to the reimbursement list[†]). This includes all medicine's status to provide a complete picture of the availability of the cohort studied.

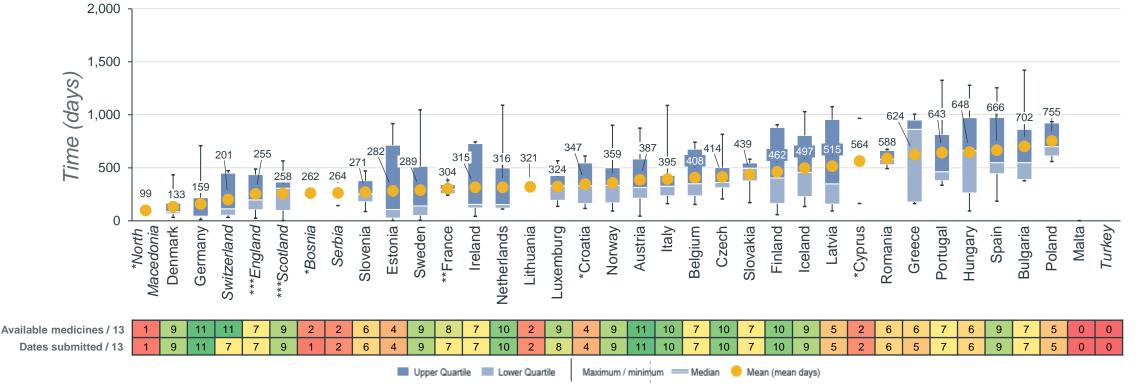


European Union average: 7 products available (54%), Limited availability (11% of all products). Combination products can include innovative branded / generic combinations; Netherlands did not submit complete information on restrictions to available medicines meaning LA* is not captured in these countries.¹In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations

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Combination therapies time to availability (2019-2022)

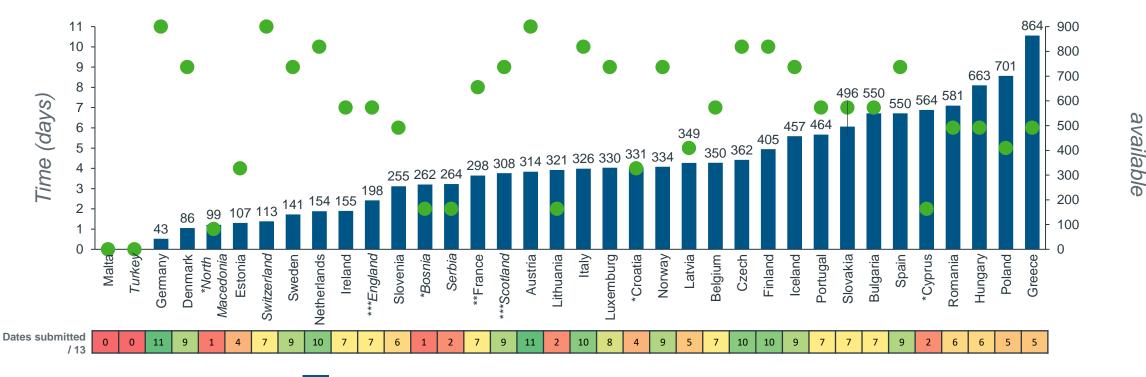
The **time to availability** is the days between marketing authorisation and the date of availability of fixed dose combination medicines to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation in most countries, except for countries shown in italics where local authorisation dates have been used. Data is correct to 5th January 2024.



European Union average: 433 days (mean) (Note: Malta is not included in EU27 average as no dates were submitted in total) Combination products can include innovative branded / generic combinations; ¹In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **For France, no combination therapy was approved via the Accès précoce system. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products

Combination median time to availability (2019-2022)

The **median time to availability** is the days between marketing authorisation and the date of availability to patients in European countries (for most this is the point at which products gain access to the reimbursement list[†]). The marketing authorisation date is the date of central EU authorisation in most countries, except for countries shown in italics where local authorisation dates have been used. Data is correct to 5th January 2024.



Median time to availability 🔍 Number of medicines available

European Union average: 375 days (median) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, NO, SE where some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative **For France, no combination therapy was approved via the Accès précoce system. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products



Number of products

Key observations

Executive summary (EU27 averages)

| Measure | All products | Oncology | Orphan | Non-oncologic orphan | Combination therapy |
|------------------------------|-----------------------------------|---------------------------------------|-----------------------------------|-----------------------------------|---|
| Average rate of availability | 43% (45% in 2022) | 52% (50% in 2022) | 35% (39% in 2022) | 32% (39% in 2022) | 54% (50% in 2022) |
| Average time to availability | 531 Days (517 days in 2022) | 559 Days (526 days in 2022) | 542 Days (625 days in 2022) | 530 Days (626 days in 2022) | 433 Days (426 days in 2022) |

Key Insights

| Rate of availability | Average rate of availability for combination therapies is 11% higher than the average for all products |
|----------------------|--|
| _ | The rate of availability for combination therapies is 4% higher than the previous study, despite the lower number of central approvals in this year's survey |
| | |
| Time to availability | The time to availability for combination therapies is the fastest across all segments, with an average of ~14 months in Europe vs ~18 months for all products |
| | For over half of the countries included in this year's WAIT survey, the time to availability of combination therapies is less than 13 months |



Metrics key:

Text colour indicates relative position versus the current (2023) EU average (*significantly worse than current EU average / significantly better than current EU average*)

Arrow colour indicates significant changes versus the previous (2021) EU average (significant improvement versus previous year 11/significant deterioration versus prior year 11)

Average calculations:

Only a difference of +/- 5% (~30 days) is considered a significant change and therefore highlighted

Malta is not included in EU27 average for time to availability as no dates were submitted in total





6. Historic comparisons and extended period

Indicators:

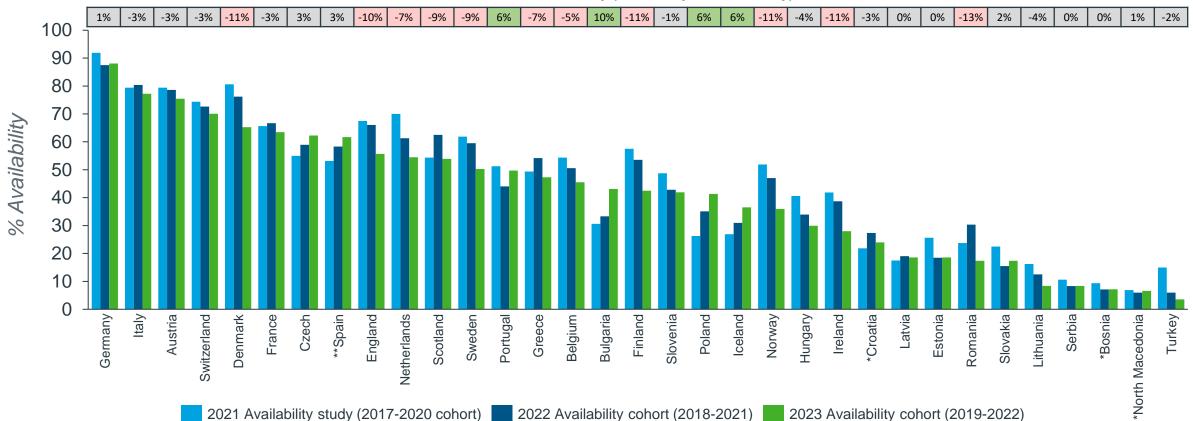
6.1. Comparison of availability versus prior studies (2021 – 2023)6.2. Comparison of time to availability versus prior studies (2021 – 2023)

6.3. Extended period total availability by approval year (2014 – 2022)



Comparison of rate of availability (2021 study – 2023 study)

The **comparison of rate of availability**[†], measured by the number of medicines available to patients in European countries as of 5th January 2024, compared to the rate of availability in previous (comparable) studies. Figures are based on the historic statistics published in the indicators, and major changes are often due to improved reporting.



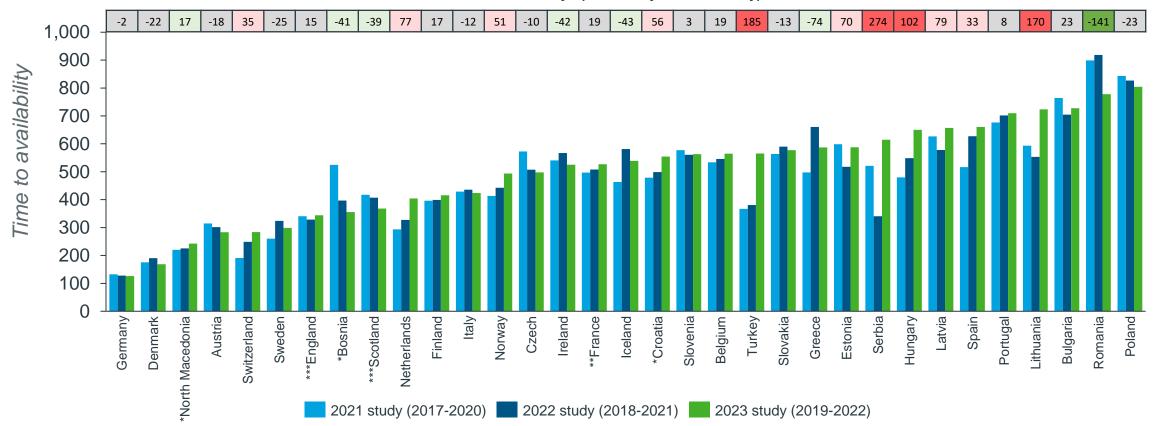
Delta in % availability (2022 study vs. 2023 study)

Increases of <=5% are not considered to be statistically significant and are therefore highlighted in grey. Note: Netherlands has retrospectively corrected 2020 data; ¹In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE some hospital products are not covered by the general reimbursement scheme. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **In Spain, the WAIT analysis does not identify those medicinal products being accessible earlier in conformity with Spain's Royal Decree 1015/2009 relating to Medicines in Special Situations



Comparison of time to availability (2021 study – 2023 study)

The **comparison of time to availability** (previously know as length of delay) is the days between marketing authorisation and the date of availability to patients compared to previous comparable studies. Figures are based on the historic statistics published in the indicators, and major changes are often due to improved reporting.



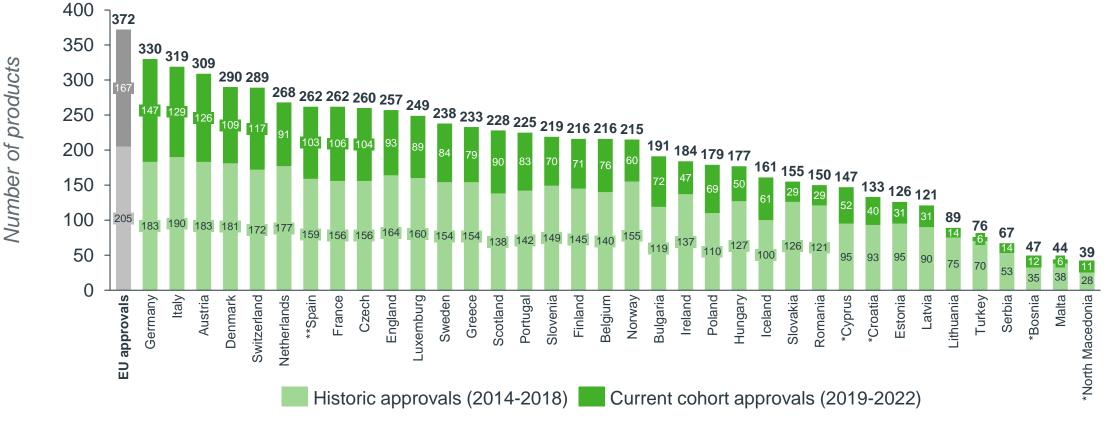
Delta in days (2022 study vs. 2023 study)

Changes of <=30 days are not considered to be statistically significant and are therefore highlighted in grey. *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative. **For France, the time to availability (527 days, n=79 dates submitted) includes products under the Accès précoce system (n=18 dates submitted) for which the price negotiation process is usually longer. If one considers that products under the Accès précoce system are directly available (time to availability = 0), the average time to availability is 424 days. ***In the UK, MHRA's Early Access to Medicines Scheme provides access prior to marketing authorisation but is not included within this analysis, and would reduce the overall days for a small subset of medicines. In this analyses, MHRA dates have been used for 2021-2022 products and EMA dates used for 2019-2020 products



Extended period total availability by approval year (2014-2022)

The **extended period total of availability by approval year** is the number of medicines available to patients in European countries (for most countries this is the point at which the product gains access to the reimbursement list[†]), split by the year the product received marketing authorization. It shows the additional data available within the Patients W.A.I.T. dataset that is not included within the standard 4-year rolling cohort.



European Union average: 207 products available (56%) [†]In most countries availability equates to granting of access to the reimbursement list, except in DK, FI, LU, NO, SE some hospital products are not covered by the general reimbursement scheme *Countries with asterisks did not complete a full dataset and therefore availability may be unrepresentative.

Note: National Associations perform checks on historic products on a best efforts basis, although it has been noted that status changes do not often occur.





Appendix and detailed methodology



Method and data availability

Process for product selection



EMA list

- List of all historic Marketing Authorisations for human and veterinary medicines (European Public Assessment Reports) accessed November 2023
- Human medicines only

Products in scope

- Products with authorisation year: 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022
- Status: Authorised
- Non-generic; Non-biosimilar; no vaccines
- Include combinations (both products can have already been approved before)
- Remove ATC K & T*
- Exclude specific ATC V products**

Survey cohort (9-years)

- Remove products with an active substance approved pre-2014
- New combination products (those containing already approved active substances are included)
- New formulations were excluded
- New indications of already approved active substances, leading to a separate marketing authorisation <u>only</u> for an orphan drug are included
- For molecules with multiple names from the same company only one molecule is included

Report cohort (4-years)

- Medicines in the 4-year rolling cohort 2019 – 2022[^]
- Exclude products that are recently withdrawn prior to analysis (3)

^ Note: Products included in the WAIT indicator are aligned with products included in EFPIA Access Hurdles Portal (except biosimilar products, which are included in the Portal and excluded in WAIT indicator)

* Removal ATC class exclusions: K = Hospital Solutions; V = Various, T = Diagnostics; Oncology definition used throughout = L1&L2&V3C&Revlimid&Xgeva&Proleukin&Pomalyst

** In previous years, all products within ATC-V class have been excluded from the WAIT indicator; However, the criteria has been adapted to exclude ATC-V products that are allergens, diagnostic agents, general nutrients, contrast media, diagnostic radiopharmaceuticals, surgical dressings, and all other non-therapeutic products; Other new innovative therapeutics that are classified within ATC-V should be considered for inclusion.



Products included in the study: 2019-2022 approvals (n=167)

| Abecma | Eladynos | Kesimpta | Opdualag | Rukobia | Tukysa |
|-------------------------------|------------------------------|-------------------|-----------|-------------------|-----------|
| Adtralza | Elzonris | Kimmtrak | Orgovyx | Rybelsus | Ultomiris |
| | Enerzair Breezhaler / Zimbus | | | | |
| Ajovy | Breezhaler | Kinpeygo | Orladeyo | Rybrevant | Uplizna |
| Amvuttra | Enhertu | Klisyri | Oxbryta | Ryeqo | Upstaza |
| Arikayce liposomal | Enjaymo | Koselugo | Oxlumo | Saphnelo | Vabysmo |
| Artesunate Amivas | Enspryng | Leqvio | Padcev | Sarclisa | Vazkepa |
| Aspaveli | Epidyolex | Libmeldy | Palynziq | Scemblix | Verquvo |
| Atectura Breezhaler / Bemrist | | | | | |
| Breezhaler | Erleada | Libtayo | Pemazyre | Sibnayal | Vitrakvi |
| Ayvakyt | Evenity | Livmarli | Phesgo | Skyrizi | Vizimpro |
| Baqsimi | Evkeeza | Livtencity | Piqray | Skytrofa | Vocabria |
| Beovu | Evrenzo | Lorviqua | Pluvicto | Sogroya | Voraxaze |
| Besremi | Evrysdi | Lumykras | Polivy | Spevigo | Voxzogo |
| Bimzelx | Fetcroja | Lunsumio | Ponvory | Spravato | Vumerity |
| Blenrep | Filsuvez | Lupkynis | Pyrukynd | Sunlenca | Vydura |
| Breyanzi | Fintepla | Mayzent | Qinlock | Sunosi | Vyepti |
| Brukinsa | Gavreto | Minjuvi | Quofenix | Tabrecta | Vyvgart |
| Byfavo | Giapreza | Mounjaro | Quviviq | Talzenna | Waylivra |
| Bylvay | Givlaari | Mulpleo | Rayvow | Tavlesse | Wegovy |
| Calquence | Hepcludex | Mycapssa | Reblozyl | Tavneos | Xenleta |
| Carvykti | Idefirix | Nexpovio | Recarbrio | Tecartus | Xenpozyme |
| Cibinqo | Imcivree | Nexviadyme | Rekambys | Tecovirimat SIGA | Xofluza |
| Copiktra | Inrebic | Ngenla | Retsevmo | Tecvayli | Xospata |
| Daurismo | Isturisa | Nilemdo | Rhokiinsa | Tepmetko | Yselty |
| Doptelet | Jemperli | Nubeqa | Rinvoq | Tezspire | Zeposia |
| Dovato | Jyseleca | Nulibry | Rizmoic | Trecondi | Zokinvy |
| Dovprela (previously | | | | | |
| Pretomanid FGK) | Kaftrio | Nustendi | Roclanda | Trepulmix | Zolgensma |
| Drovelis/Lydisilka | Kapruvia | Obiltoxaximab SFL | Roctavian | Trixeo Aerosphere | Zynlonta |
| Ebvallo | Kerendia | Ontozry | Rozlytrek | Trodelvy | |

Products included in the study by segment: 2019-2022 approvals

Oncologics (n=48)

| Zynlonta | Pemazyre |
|-----------|-----------|
| Pluvicto | Retsevmo |
| Opdualag | Tukysa |
| Scemblix | Enhertu |
| Tecvayli | Elzonris |
| Tabrecta | Phesgo |
| Lunsumio | Tecartus |
| Carvykti | Calquence |
| Orgovyx | Ayvakyt |
| Padcev | Blenrep |
| Breyanzi | Rozlytrek |
| Kimmtrak | Piqray |
| Tepmetko | Daurismo |
| Lumykras | Sarclisa |
| Rybrevant | Nubeqa |
| Brukinsa | Polivy |
| Trodelvy | Xospata |
| Gavreto | Vitrakvi |
| Qinlock | Libtayo |
| Minjuvi | Talzenna |
| Abecma | Trecondi |
| Copiktra | Lorviqua |
| Jemperli | Vizimpro |
| Nexpovio | Erleada |
| | |

Notes: Segments are not mutually exclusive; *Trelegy Ellipta and Elebrato Ellipta are considered as one product as there are multiple authorisations for the same active substance combination on the same date

Orphans (n=63)

| Ebvallo | Enspryng |
|-------------------|---------------------|
| Livmarli | Koselugo |
| Mycapssa | Sogroya |
| Enjaymo | Evrysdi |
| Livtencity | Pemazyre |
| Pyrukynd | Inrebic |
| Nulibry | Elzonris |
| Amvuttra | Fintepla |
| Scemblix | Libmeldy |
| Roctavian | Tecartus |
| Vyvgart | Oxlumo |
| Zokinvy | Obiltoxaximab SFL |
| Upstaza | |
| | Arikayce liposomal |
| Kinpeygo | Ayvakyt |
| Xenpozyme | Blenrep Idefirix |
| Filsuvez | Kaftrio |
| Lunsumio | |
| Carvykti | Dovprela |
| Kimmtrak | Hepcludex |
| Oxbryta | Daurismo |
| Ngenla | Reblozyl |
| Tavneos | Zolgensma |
| Skytrofa | Trepulmix |
| Voraxaze | Givlaari |
| Aspaveli | Polivy |
| Artesunate Amivas | Isturisa |
| Qinlock | Xospata |
| Minjuvi | Epidyolex |
| Voxzogo | Trecondi |
| Abecma | Palynziq |
| Bylvay | Waylivra |
| Imcivree | |

Non-oncologic orphans (n=47)

| Ebvallo | Imcivree |
|-------------------|--------------------|
| Livmarli | Enspryng |
| Mycapssa | Koselugo |
| Enjaymo | Sogroya |
| Livtencity | Evrysdi |
| Pyrukynd | Inrebic |
| Nulibry | Fintepla |
| Amvuttra | Libmeldy |
| Roctavian | Oxlumo |
| Vyvgart | Obiltoxaximab SFL |
| Zokinvy | Arikayce liposomal |
| Upstaza | Idefirix |
| Kinpeygo | Kaftrio |
| Xenpozyme | Dovprela |
| Filsuvez | Hepcludex |
| Oxbryta | Reblozyl |
| Ngenla | Zolgensma |
| Tavneos | Trepulmix |
| Skytrofa | Givlaari |
| Voraxaze | Isturisa |
| Aspaveli | Epidyolex |
| Artesunate Amivas | Palynziq |
| Voxzogo | Waylivra |
| Bylvay | |

Combination therapies (n=13)

| Opdualag |
|--|
| Ryeqo |
| Drovelis/Lydisilka |
| Sibnayal |
| Roclanda |
| Phesgo |
| Trixeo Aerosphere |
| Kaftrio |
| Enerzair Breezhaler / Zimbus Breezhaler |
| Atectura Breezhaler / Bemrist Breezhaler |
| Nustendi |
| Recarbrio |
| Dovato |



Country specific definitions of products with availability

| Country | Definition of availability |
|-----------------|--|
| Austria | A medicine is available if it is included in the reimbursement system (EKO) or available through the Austrian pharmacies list |
| Belgium | Medicine is available if it is listed on the official website of INAMI-RIZIV as a definitive reimbursement or as a temporary reimbursement (code T) under a Managed Entry Agreement |
| Bosnia | Accessibility on the public reimbursement list |
| Bulgaria | Accessibility on the public reimbursement list |
| Croatia | Accessibility on the public reimbursement list |
| Cyprus | Accessibility on the public reimbursement list |
| Czech | Product present on the market either (a) reimbursed or (b) not reimbursed but covered by patient or by individual patient approval by insurance funds |
| Denmark | Products that are accessible in Denmark and available for public reimbursement |
| England | Medicines are deemed available if NICE has issued a positive recommendation. For the remaining medicines, IQVIA sales data are analysed to determine if routinely available. |
| Estonia | A pharmacy product is available if it is reimbursed (pharmacy products) or added to the hospital service list. |
| Electron d | A pharmacy product is available if it is on a national reimbursement list. Hospital products need an appraisal for COHERE (Council of Choices in Healthcare in Finland) or from the National Assessment Network coordinated by FinCCHTA |
| Finland | (Finnish Coordinating Center for HTA). |
| France | Accessibility on the public reimbursement list |
| Germany | Following marketing authorisation, prescription drugs automatically receive reimbursed status |
| Greece | Accessibility on the public reimbursement list |
| Hungary | Medicines are either reimbursed through the indication linked reimbursement system, or available by special finance system (item based) or financed by hospital budget |
| Iceland | Accessibility on the public reimbursement list |
| Ireland | Accessibility on the public reimbursement list, through a hospital setting or other public scheme |
| Italy | A product is available if it has received reimbursement status |
| Latvia | Accessibility on the public reimbursement list |
| Lithuania | Accessibility on the public reimbursement list |
| Luxembourg | Accessibility on the public reimbursement list (retail drugs); or product D and H commercialized medicines (hospital drugs) |
| North Macedonia | Product is available via specially allocated budget for all eligible patients |
| Malta | Accessibility on the public reimbursement list |
| Netherlands | Accessibility on the public reimbursement list |
| Norway | The medicines has received a positive reimbursement decision by NoMA (out-patient drugs), or the Decision Forum (hospital products) |
| Poland | In most cases a medicine is available if it gains access to the reimbursement list; some medicines are financed via state budget and the date of accessibility would be the date of tender results published by governmental payers. |
| Portugal | Accessibility on the public reimbursement list |
| Romania | For 98% of reimbursed medicines, accessibility is considered to be at therapeutic protocol publication (as the HCP cannot prescribe the product until the therapeutic protocols are published). For the remaining 2% of reimbursed medicines that don't need therapeutic protocols, accessibility is after publication in the reimbursement list. |
| Scotland | Medicines are deemed available if SMC has issued a positive HTA recommendation. For the remaining medicines, IQVIA sales data are analysed to determine if routinely available. |
| Serbia | Accessibility on the public reimbursement list |
| Slovakia | Availability according to the National Health Information Center. For remaining medicines, IQVIA sales data is used. |
| Slovenia | A medicine is available if it is reimbursed through the regular system, or automatically reimbursed |
| Spain | Medicines are deemed available if SMC has issued a positive recommendation. For the remaining medicines, IQVIA sales data are analysed to determine if routinely available. |
| Sweden | A medicine is classified as available (nationally reimbursed) if it was marketed in Sweden as of December 21st 2023 (listed as supplied in FASS), and: Is indicated for a disease included in the communicable disease program, or Had received a positive recommendation from the New Therapies (NT) Council (hospital drugs), or - Had not received an NT-recommendation and is not part of national managed introduction (hospital drugs) |
| Switzerland | The medicine gained market approval by Swissmedic. Delay calculated using local market authorisation dates. |
| Turkey | A medicine is available if it gains access to the reimbursement list. |



Country specific definitions of products with limited availability

| Country | Definition of limited availability |
|-----------------|--|
| Austria | Products outside reimbursement system (EKO), but reimbursed on individual pre-approval (No Box) |
| Belgium | No products are reported to have limited availability |
| Bosnia | There are no restrictions on availability meaning medicines are reimbursable in all approved patient populations |
| Bulgaria | Reimbursement is only granted for specific subpopulations of the approved indications, for individual patients on a named patient basis or there is limited reimbursement while a decision is pending. |
| Croatia | Products are available for specific patient cohorts (reimbursement guidelines outline specific criteria describing patient eligibility for treatment). |
| Cyprus | Reimbursment is only granted, on an indivitual name patient basis or for specifi subpopulations of the approved indications. |
| Czech | Reimbursed only if: (a) prescribed by specific speciality of physician; (b) specific setting (e.g. Centers of excellence) (c) hospital product only |
| Denmark | Products that have received a partial recommendation or are not recommended by the Danish Medicines Council as well as products that have received conditional reimbursement or individual reimbursement by The Reimbursement Committee. |
| England | Recommended for a restricted patient cohort relative to licensed indication, either: (a) through an optimised NICE decision (including optmised CDF decisions) or an individual funding request. (b) where at least one indication is recommended for use but either optmised, not recommended, or no decision reached to date for another indication. |
| Estonia | Only reimbursed for restricted patient cohort. |
| Finland | Reimbursement is only granted for specific subpopulations of the approved indications, for individual patients on a named patient basis or there is limited reimbursement while a decision is pending. |
| France | Some innovative products without competitors can be made available prior to market authorisation under the Early Access program. |
| Germany | There are no restrictions on availability meaning drugs are reimbursable in all patient populations. |
| Greece | Only reimbursed for restricted patient cohorts, or case by case reimbursement if the responsible committee judges its use necessary. |
| Hungary | Medicine is available through a Name Patient Program (access depends on application for individual use) |
| Iceland | Products are available to the patients with full reimbursement, but only through individual reimbursement, which can be applied for on individual basis by the patient's doctor. |
| Ireland | Subject to Managed Access Protocol |
| Italy | A product has limited availability if it has not received the reimbursement status (decision is pending) but it is dispensed, generally, via hospital for a specific subpopulation, subject to medical advice. It is not at patient's expense |
| Latvia | Limited reimbursement to specific subpopulations of the approved indications; individual reimbursement (limited reimbursement on the named patient basis) |
| Lithuania | Only reimbursed for limited indications (compared to what was approved at market authorisation) |
| Luxembourg | There are no restrictions on availability |
| North Macedonia | Product is available via specially allocated budget for limited number of patients |
| Malta | Limited availability means on a named patient basis or similar or at times approved on a named patient basis for subpopulations. |
| Netherlands | Only reimbursed under certain therapeutic conditions (annex 2 on the positive reimbursement list). |
| Norway | The Association has only information on limited availability for specific subpopulation of the approved indication. We have no access to public information on limited availability to individual patients (named patient basis), or a group of patients while decision is pending |
| Poland | Only reimbursed for limited indications (compared to what was approved at market authorisation) |
| Portugal | Product is only available on a patient by patient basis and after an Exceptional Authorisation has been granted, usually while public financing decision is pending (i.e., during the assessment process) |
| Romania | Reimbursement is only granted for specific subpopulations of the approved indications, for individual patients on a named patient basis or there is limited reimbursement while a decision is pending. Limited availability refers also to MEA. |
| Scotland | Recommended for a restricted patient cohort relative to licenced indication by SMC using their HTA process (through submission or resubmission) |
| Serbia | Products are reimbursed with significant restrictions on the number of patients (e.g. for new generation HepC medicines, there is a cap on only 60 patients per year) or number of indications |
| Slovakia | Drugs included in the reimbursement list have some limitation (prescription limitation, indication limitation and limitation based on prior insurance company approval), or are reimbursed for individual patients |
| Slovenia | Only reimbursed for restricted patient cohort |
| Spain | Recommended for a resticted patient cohort relative to licensed indication by SMC using their HTA process (through submission or resubmission). |
| Sweden | Only reimbursed for restricted patient cohort |
| Switzerland | For products pending reimbursement, patients have restricted reimbursement access. Such restricted access includes 'individual reimbursement' regulated by Art. 71a-b of KVV ordinance. |
| Turkey | Products only available through a "Named Patient Scheme". These medicines do not require TITCK (Turkish Medical Agency) approval but are reimbursed. |

Country specific definitions of the availability date

| Country | Definition of the availability date |
|-----------------|---|
| Austria | The first date of availability on the public reimbursement list or Austrian Pharmacies list |
| Belgium | The first date of availability on the public reimbursement list available on the website of the payer INAMI-RIZIV : https://ondpanon.riziv.fgov.be/SSPWebApplicationPublic/fr/Public/ProductSearch |
| Bosnia | The first date of availability on the public reimbursement list |
| Bulgaria | In general, new innovative products are eligible for reimbursement as of 1st January following the year they have been included in PDL, however there are nuances and exceptions. |
| Croatia | The first date of availability on the public reimbursement list |
| Cyprus | The first date of availability on the public reimbursement list |
| Czech | The first date of availability on the public reimbursement list |
| Denmark | Products are available when they have been marketed on the Danish pharmaceutical market and a price has been listed on Medicinpriser.dk. |
| England | For medicines with a positive NICE recommendation, the accessibility date is the date of publication of the Final Draft Guidance produced by NICE (oncology medicines), or date of published guidance + 90 days (non-oncology medicines). Oncology medicines benefit from earlier funding. For the remaining medicines, IQVIA sales data is analysed to determine month of routine availability. |
| Estonia | Availability date of reimbursement list and date of inclusion to the health service list or state project tender decision time. |
| Finland | Availability for reimbursed products is the date of Pharmaceutical Pricing Board approval. For hospital products, the date of availability is the COHERE appraisal date OR the National Assessment Network appraisal date. |
| France | The first date of availability on the public reimbursement list |
| Germany | Date of market entry listed in the LauerTaxe |
| Greece | The first date of availability on the public reimbursement list |
| Hungary | The date when the therapy is available for the first patient. This is the earliest date that the therapy is available on the public reimbursement list or the date the first patient received the therapy in Named Patient Program. |
| Iceland | The first date of availability on the public reimbursement list |
| Ireland | The first date of availability on the public reimbursement list |
| Italy | The first date of availability on the public reimbursement list |
| Latvia | The first date of availability on the public reimbursement list |
| Lithuania | The first date of availability on the public reimbursement list |
| Luxembourg | The date of the decision to include the medicine into the public reimbursement list |
| North Macedonia | The Positive Drug List has not been revised for more than 10 years. Therefore, availability dates are provided on a case by case basis. |
| Malta | The first date of availability on the public reimbursement list |
| Netherlands | The first date of availability on the public reimbursement list; or for hospital products, the date of the positive decision in Decision Forum |
| Norway | The first date of availability on the public reimbursement list, except for HIV / haemophilia drugs (financed by state budget) where availability date is date of publication of tender results or date of first order received from companies. |
| Poland | The first date of availability on the public reimbursement list |
| Portugal | Date of publication of government decision (for medicines that don't need therapeutic protocols elaboration or update) or therapeutic protocols (for the majority of medicines) in the Official Journal. |
| Romania | For medicines with a positive SMC recommendation, the accessibility date is the date of published guidance. For remaining medicines, IQVIA sales data is analysed to determine month of routine availability. |
| Scotland | The first date of availability on the public reimbursement list |
| Serbia | The first date of availability on the public reimbursement list (published on monthly basis) |
| Slovakia | The first date of availability on the public reimbursement list |
| Slovenia | For medicines with a positive SMC recommendation, the accessibility date is the date of published guidance. For the remaining medicines, the IQVIA sale data is analysed to determine month of routine availability. |
| Spain | For medicines indicated For diseases included in the communicable disease program: date of marketing in Sweden (supplied in FASS); For nationally reimbursed prescription medicines with a TLV decision: date of TLV decision; For nationally reimbursed hospital drugs with an NT-recommendation: date of NT recommendation; For nationally reimbursed hospital medicines lacking an NT-recommendation and not part of national managed introduction: date of marketing in Sweden (supplied in FASS) |
| Sweden | For medicines indicated For diseases included in the communicable disease program: date of marketing in Sweden (supplied in FASS); For nationally reimbursed prescription medicines with a TLV decision: date of TLV decision; For nationally reimbursed hospital drugs with an NT-recommendation: date of NT recommendation; For nationally reimbursed hospital medicines lacking an NT-recommendation and not part of national managed introduction: date of marketing in Sweden (supplied in FASS) |
| Switzerland | The date of full availability is the first date of availability on the public reimbursement list; the date of limited availability is the first date of availability on the list of products reimbursed through "Named Patient Scheme" |

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Country-specific insights: Local pharma industry associations

