



A new independent study, conducted by New Angle, a consulting and research company and sponsored by Viatriis Europe, reveals growing vulnerabilities to the supply of off-patent antibiotics.

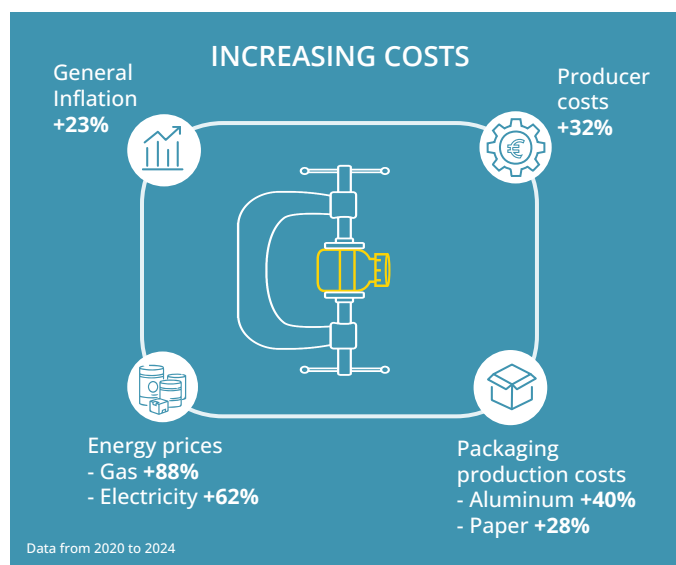
Improving patient access to medicines across Europe requires national price systems reforms.

Scope of countries included in the study



Austria, Belgium, Croatia, Estonia, Finland, Germany, Hungary, Ireland, Italy, Norway, Poland, Portugal, Spain, Sweden, Switzerland and the United Kingdom

Sustainability challenges in patient access for medicines across Europe



PRICE PRESSURE

For the top 10 most used off-patent antibiotics, prices are 10,4% lower in 2024 than in 2020

PHARMACEUTICAL MARKET CONSOLIDATION



240
Antibiotics
Withdrawal¹

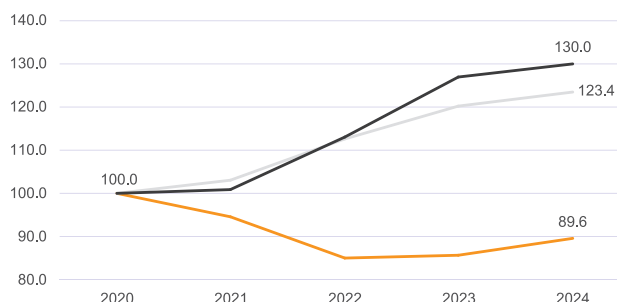
Medicine Shortages

385
Reported
shortages²



INFLATION

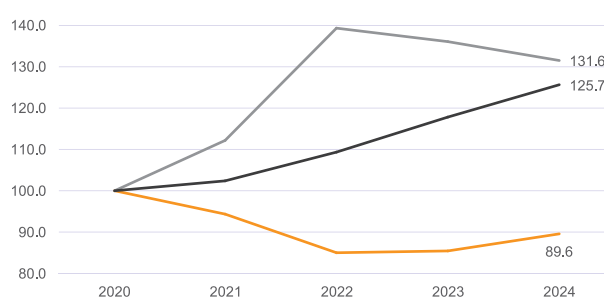
Price evolution of off-patent antibiotics Vs Inflation (HICP) ^{2,3}



Between 2020 and 2024, inflation grew by +23,4% (+30% for food) while off-patent antibiotic prices decreased by -10,4%

PRODUCTION COSTS

Price evolution of off-patent antibiotics Vs Producer Price indexes ^{2,3}



Between 2020 and 2024, producer costs increased +31,6% (labor costs +25,7%) while antibiotic prices dropped -10,4%

¹Source: IQVIA Midas Data, Ex-Factory Price in EUR (LEU MNF) & Counting Units, FY 2020-2024, extracted on 31st May 2025.

²Source: Shortages were obtained from the national medicines' agencies in each country during the period from 23rd June to 7th July and they reflect shortages at a point in time. Information not available for Estonia.

³Source: Eurostat and the Office for National Statistics of each country (for industry PPI). 2020 index = 100. Labor costs not available for Switzerland and Sweden. New Angle analysis.

The methodology is based on a quantitative analysis of price data, and economic indicators, complemented by a review of scientific and grey literature, as well as interviews with key stakeholders. The comparative analysis for 2020-2024 was conducted using indices, with 2020 as the baseline (100)



Europe has long benefited from a competitive off-patent medicines market, delivering **safe, effective, and affordable treatments to millions of patients**. To protect this access model, pricing and procurement systems must evolve to address current access challenges and reward off-patent medicines for their therapeutical value. **New pricing and procurement systems should enable economic viability of medicines, protecting availability and patient access to medicines.**



Reforming pricing and tendering systems



Price indexation - Prices should be subject to automatic adjustments, based on inflation or other meaningful and agreed-upon cost indices, to support economic viability and patient access to medicines



Minimum prices - Medicine prices should not be permitted to fall below a defined “floor” level, to ensure sustainable production and avoid market distortions that inhibit competition



Tiered pricing models - Medicine prices should be adjusted consistent with the degree of competition, allowing increases or decreases depending on the number of suppliers, to promote competition



Procurement reform - To further protect patient access, procurement systems should consider:

- Multi-winner tenders,
- Clear, predictable non-price criteria, including supply reliability and environmental standards,
- Increase demand predictability,
- Diversify supply sources



Collaboration and collective responsibility

- **Ensuring access to medicines is a shared responsibility.** Collaboration between policymakers, patient associations, healthcare professionals and pharmaceutical actors can lay the foundation for a stronger European Health Union. One that serves the needs of every citizen.

