

**Securing access, improving lives.
Strengthening patients' access to off-patent medicines in Europe**

- *Amidst the backdrop of widespread medicine supply challenges across Europe¹, a new independent study, conducted by New Angle, a consulting and research agency, and sponsored by Viatriis, a global healthcare company, investigates the reasons behind the shortages of essential off-patent medicines, with a particular focus on antibiotics.*
- *The study, conducted in 16 countries, confirms that shortages of key antibiotics, like amoxicillin and azithromycin, result from a confluence of factors including rising production costs and persistent price decreases.*
- *The study shows that between 2020 and 2024, the average price of the top 10 off-patent antibiotics dropped by 10%², despite sharp increases in production costs and inflation.*
- *These dynamics are driven by national pricing systems that do not give the possibility to manufacturers to increase prices even when facing steep cost increases, further limiting patient access to essential medicines in Europe. Therefore, the study calls for reforms to national pricing and procurement systems to secure patient access to medicines.*

BRUSSELS, September 29, 2025 – A new independent study, conducted in Europe by New Angle, a consulting and research agency, and sponsored by Viatriis Inc. (Nasdaq: VTRS), a global healthcare company, investigates the reasons behind the increasing unavailability of medicines. While focusing on antibiotics, which are vital to public health, the study also illustrates the broader risks affecting the supply of essential medicines.

The study, titled **Securing access, improving lives. Strengthening patients' access to off-patent medicines in Europe**, conducted across 16 European countries, found that between 2020 and 2024, soaring production costs - including a 31.6% rise in industrial prices, 25.7% in labor, energy spikes, and increased costs for key materials - combined with declining medicines prices, have created an unsustainable environment that is driving suppliers out of the market, and putting patient access to medicines at risk.

Findings show that between 2020 and 2024, the average price of the top 10 off-patent antibiotics dropped by 10%³, despite sharp increases in production costs and inflation. Amoxicillin alone saw a nearly 19% price drop and was among the most affected by widespread shortages reported across key antibiotics in mid-2025. This unsustainable gap is driving market exits, further limiting access to essential medicines for patients.

The data underscores the urgent need for national price system reforms to protect access to these critical medicines, which are foundational to public health and patient care. The study analyzed off-patent antibiotic price and availability, across four years (2020-2024), in **16 European countries**: Austria, Belgium, Croatia, Estonia, Finland, Germany, Hungary, Ireland, Italy, Norway, Poland, Portugal, Spain, Sweden, Switzerland and the United Kingdom. These countries represent a diverse cross-section of healthcare systems and market conditions across Europe.

¹ <https://www.medicinesforeurope.com/key-topics-medicine-shortages/>

² Average decline of 10%

³ Average decline of 10%

Commenting on the study's conclusions, **Margarida Bajanca, New Angle lead researcher** underlines: "Off-patent antibiotics serve as an essential foundation of healthcare—enabling the routine treatment of infections and forming the established standard for surgical prophylaxis. Our study shows that while prices continue to fall, as a direct result of pricing and procurement rules, the costs of making these medicines are rising sharply, threatening their long-term viability and availability. Without targeted reforms - such as inflation-linked price adjustments⁴, minimum prices (floor price)⁵ or tiered pricing models⁶ - patients across Europe risk losing access to these treatments, which would undermine public health and accelerate antimicrobial resistance."

"Securing patient access to medicines requires strong and sustainable market policies that reflect the therapeutic value of off-patent medicines, fostering access and supply security for all European patients," **says Artur Cwiok, Head of Europe and Canada at Viatris**. "We urge policymakers, payers, healthcare professionals and industry leaders to work together to implement reforms that prioritize patient access and supply resilience."

"The findings of this study are striking. That the price of a course of antibiotics would cost less than a cup of coffee in some European countries is preposterous. We need to rethink the value of these medicines to society, and have an open and critical discussion about whether our current pricing policies are doing more damage than good, when we look at the bigger picture trends toward market consolidation. I hope European policy makers pay close attention to the effects of the pricing policies they endorse, and take bold action to reverse this trend, with a strong Critical Medicines Act for Europe, paired with country level market reform" **says Adrian van den Hoven, Director General of Medicines for Europe**.

Key findings

- **Cost rising.**
 - **Production price index** – increased 31.6% in the period.
 - **Labor costs**, which are significant for medicines, increased 25.7%.
 - **Inflation** general inflation grew by 23.4%
Energy prices, electricity and gas, had huge increases during the period mainly gas in 2022, which increased by 173.2%. Although prices have since stabilized somewhat, the increase in 2024 was 88.4% and 62.3% for natural gas and electricity respectively.
 - The cost of **key materials used to produce medicines** - like aluminum and packaging, has risen sharply, with aluminum prices up 40% and packaging costs up nearly 25% since 2020.
- **Prices falling.**
 - Between 2020 and 2024, prices for the top 10 off-patent antibiotics fell by 10.4%.

⁴ Price is subject to automatic indexation based on inflation or agreed health cost indices, supporting economic viability and availability of medicines.

⁵ Minimum prices - Price of the medicine cannot drop below a defined value (floor price), ensuring medicines are not sold below sustainable production cost, preventing market distortion that limit competition

⁶ Price of the medicine varies according to the level of competition, allowing the prices to increase or decrease as the number of suppliers of that medicine decreases or increases.

- Amoxicillin, Amoxicillin with Clavulanic Acid, and Azithromycin - which together accounted for 52% of total value in 2024 - experienced price drops of 18.9%, 5.9%, and 7.9%, respectively.
- **Unavailability of antibiotics:** Shortages were reported for nearly every key antibiotic included in the study. Notably, 240 antibiotic products were withdrawn from the market, and 385 shortages were reported across the countries studied⁷. Amoxicillin, azithromycin and other critical medicines were among the most affected.
- **Supply fragility:** Market consolidation and shrinking margins have led to reduced supplier diversity, increasing the risk of stockouts and compromising continuity of care.

Why it matters

Off-patent antibiotics are essential for treating bacterial infections and preventing complications in surgeries and chronic disease management. When first-line antibiotics are unavailable, patients may receive suboptimal alternatives; antibiotics availability is a critical factor to timely fight infection and combat antimicrobial resistance (AMR).

Broadly, this is a picture relevant for all essential medicines across Europe. In disease areas with the highest public health impact, off-patent medicines are typically the first treatment option. As a result, the effectiveness of public health initiatives in enhancing population health relies heavily on ensuring access to and proper use of these affordable medicines.

Policy recommendations

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 recognize off-patent medicines for their therapeutic value. New pricing and procurement systems should enable economic viability of medicines, protecting availability and patient access to medicines.

Recommended actions include:

- **Price indexation to inflation and production costs** - Price is subject to automatic indexation, based on inflation or agreed health cost indices, supporting economic viability and availability of medicines as production costs increase.
- **Minimum prices** - Price of the medicine cannot drop below a defined value (floor price), ensuring medicines are not sold below sustainable production cost, preventing market distortion that limit competition
- **Tiered pricing models** Prices of medicines vary according to the level of competition, allowing the prices to increase or decrease as the number of suppliers of that medicine decreases or increases, supporting a healthy multi-supplier market competition
- **Procurement reform**, including multi-winner tenders and non-price criteria such as supply reliability and environmental standards.

These targeted policy interventions would help stabilize supply and protect access to essential medicines, recognizing off-patent medicines for their therapeutic value.

⁷ Shortages were collected from each countries' health authorities between 23rd June 2025 and 7th July 2025 and they represent shortages for a specific day.

A broader vision for access

As Europe's number one supplier of medicines⁸, ViatriS delivers over 32 billion doses of medicines each year through a diverse portfolio of more than 700 molecules - across all major therapeutic areas - and plays a critical role in working with stakeholders to advance access to medicines.

ViatriS believes that securing the future of healthcare in Europe requires partnership, collaboration, and strong policies that foster access and supply security for all patients. The company's EU Access campaign is built around three core focus areas:

- **Securing access to critical medicines:** Ensuring patients in every EU country have access to the medicines they need when they need them.
- **Addressing Europe's most pressing health issues:** Advancing access to medicines and education in key therapeutic areas.
- **Building future access:** Tackling unmet patient needs and supporting reforms that make the pharmaceutical system more resilient and patient centered.

With approximately 10,000 employees across Europe⁹ and a portfolio of more than 700 molecules, ViatriS carries out all aspects of drug development and delivery, including manufacturing, packaging and commercial operations. Its global, flexible and diverse supply chain—supported by 26 manufacturing and packaging facilities and 10 development centres, including 13 in Europe - is designed to reduce the risk of disruption and support reliable access even in the face of demand volatility.

ViatriS welcomes recent EU-level initiatives such as the Critical Medicines List, the Critical Medicines Alliance, and the proposed Critical Medicines Act, and stands ready to support efforts that close access gaps and strengthen supply chain resilience across Member States.

About the study

The study covers 16 European countries and draws on scientific and grey literature, MIDAS/IQVIA data, and both quantitative and qualitative analyses of off-patent antibiotics. Off-patent antibiotics were selected as case-analysis due to its public health relevance as a first line of treatment, the widespread access and availability challenges within this therapeutic class. To support consistent analysis, defined baskets of off-patent antibiotics were examined in detail. Learn more about the study on ViatriS EU Policy website, [here](#).

About New Angle

Founded by specialists across health, finance, automotive, public sector and industry, New Angle brings many years of consulting expertise to highly complex and demanding environments, operating out of Portugal and Angola. Our interdisciplinary team combines deep domain knowledge with strategic insight to deliver creative, integrated, and high-impact solutions. New Angle's Health Unit is a center of excellence in strategy, market access, and research. We support health stakeholders across Portugal, Angola, Central Asia, and other

⁸ IQVIA, May 2025

⁹ Internal data, 2024



African regions, driving meaningful impact through region-adapted, evidence-based approaches.

About Viatriis

[Viatriis Inc.](#) (Nasdaq: VTRS) is a global healthcare company uniquely positioned to bridge the traditional divide between generics and brands, combining the best of both to more holistically address healthcare needs globally. With a mission to empower people worldwide to live healthier at every stage of life, we provide access at scale, currently supplying high-quality medicines to approximately 1 billion patients around the world annually and touching all of life's moments, from birth to the end of life, acute conditions to chronic diseases. With our exceptionally extensive and diverse portfolio of medicines, a one-of-a-kind global supply chain designed to reach more people when and where they need them, and the scientific expertise to address some of the world's most enduring health challenges, access takes on deep meaning at Viatriis. We are headquartered in the U.S., with global centers in Pittsburgh, Shanghai and Hyderabad, India. Learn more at viatriis.com and investor.viatriis.com, and connect with us on [LinkedIn](#), [Instagram](#), [YouTube](#) and [X](#).

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