

Access to Innovation

International Trends & Strategies

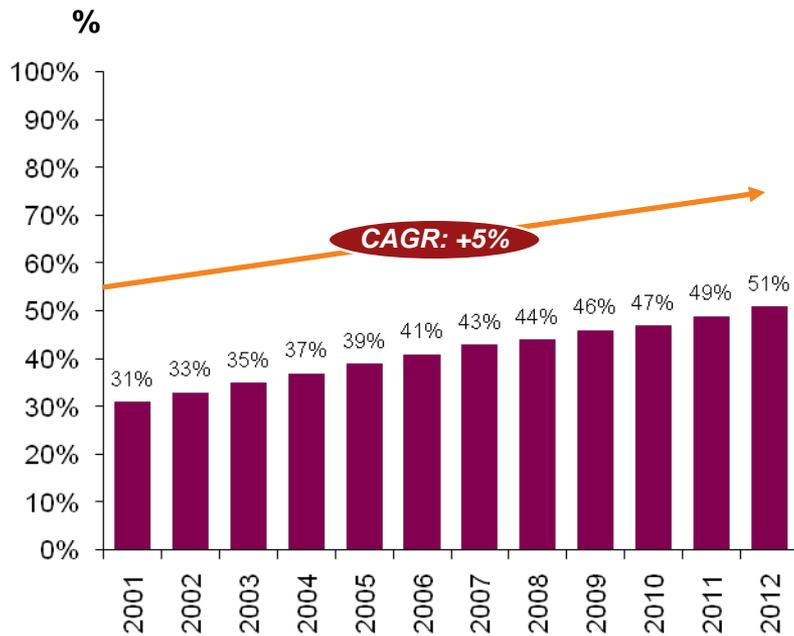
27 March 2014

Jeroen Commissaris
Country President AstraZeneca Greece



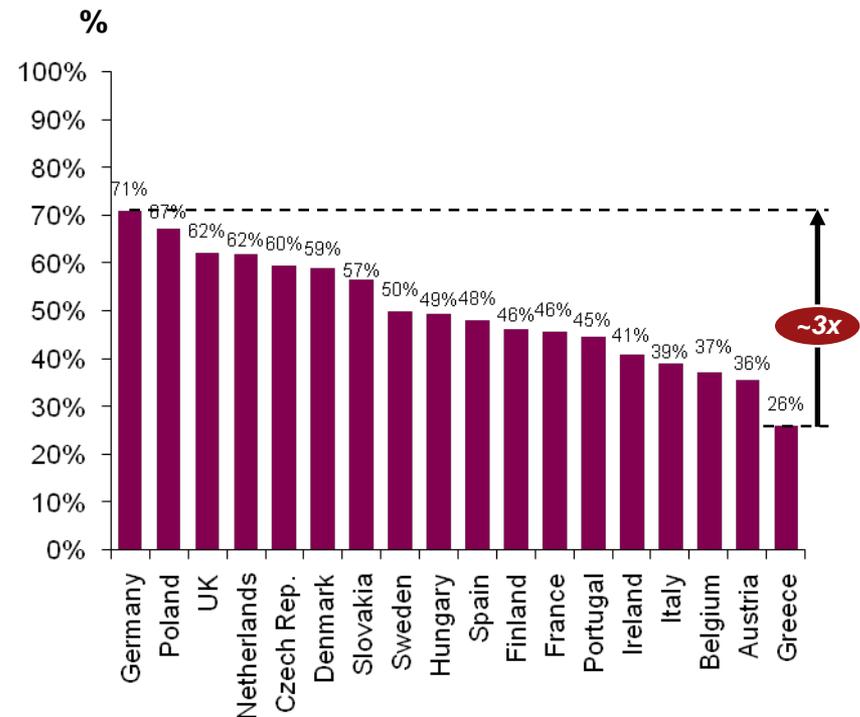
While the share of generic usage has increased by 50%, there is still scope to improve the effectiveness of medicines usage in many markets

- Generic market share of volume sales 2001 - 2012



■ Generic market share of volume sales (SU)

- Generic market share of volume sales (selected countries)

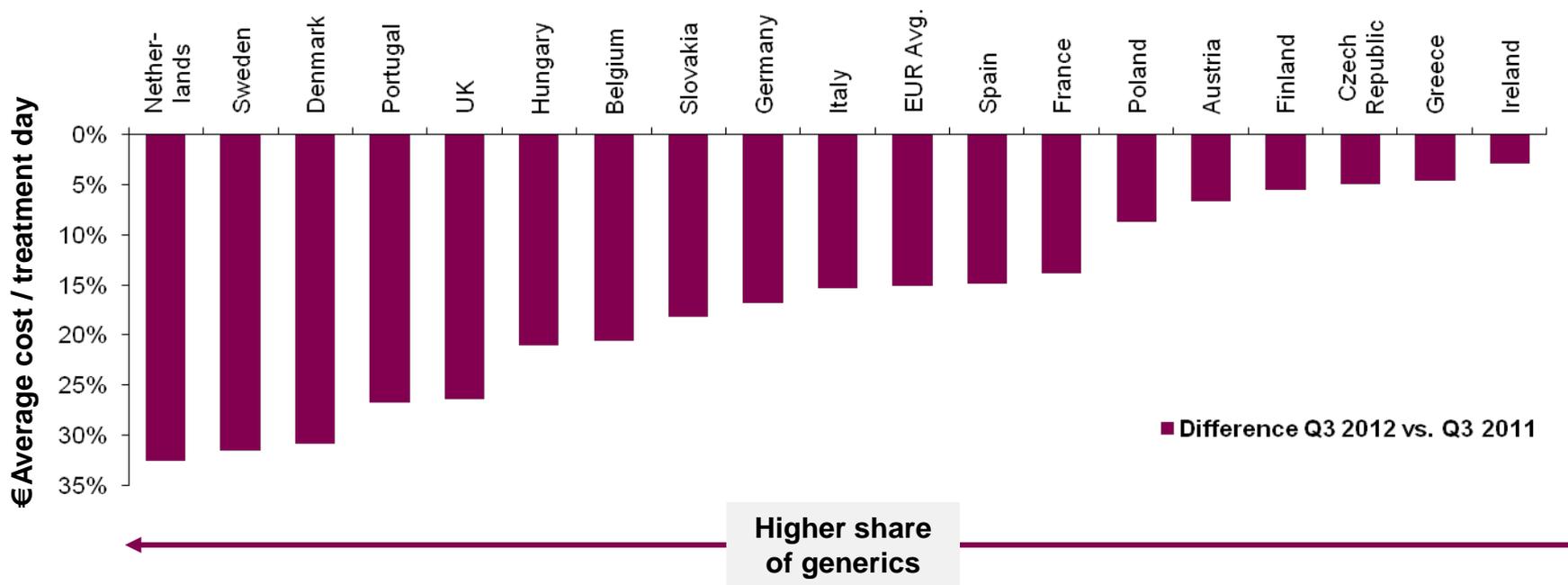


■ Generic market share of volume sales (SU)



Even over a short 12 month period average costs of genericized treatments have declined, with 'efficient' markets making dramatic gains

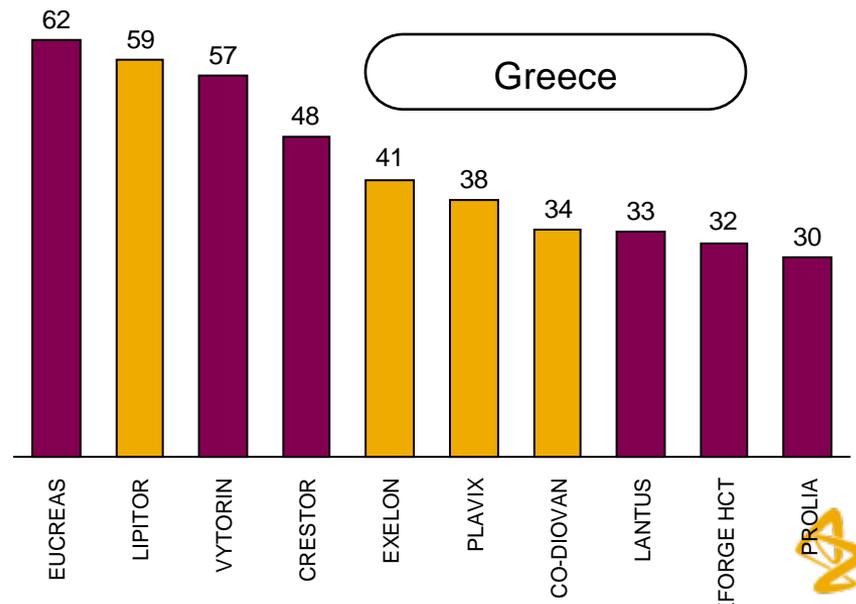
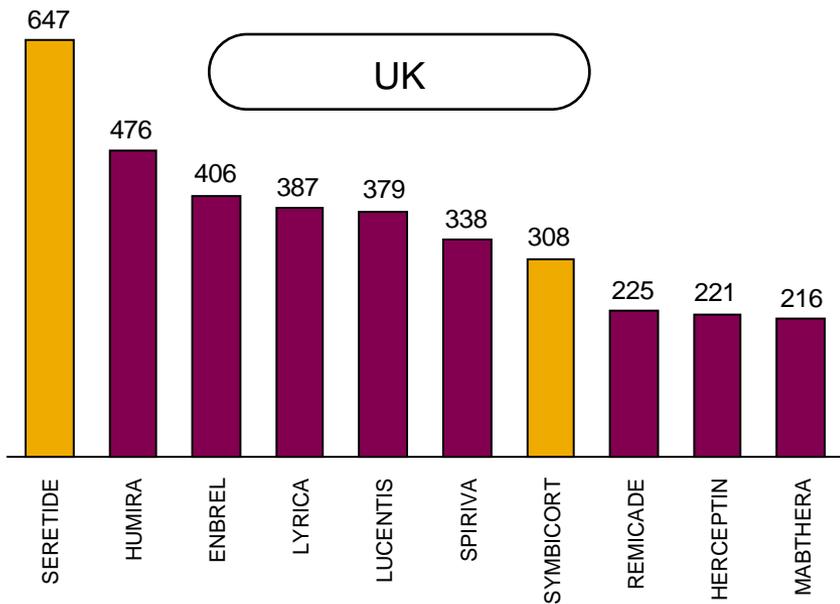
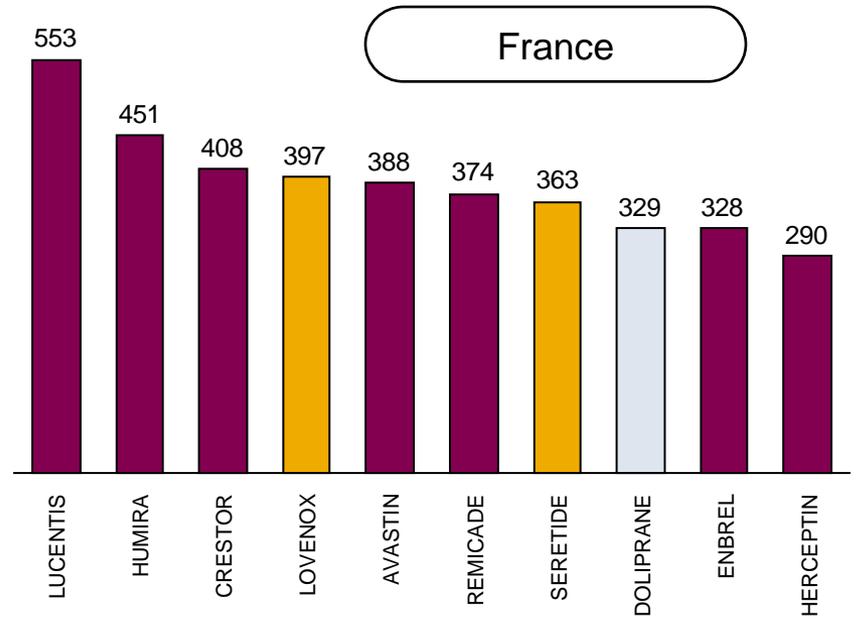
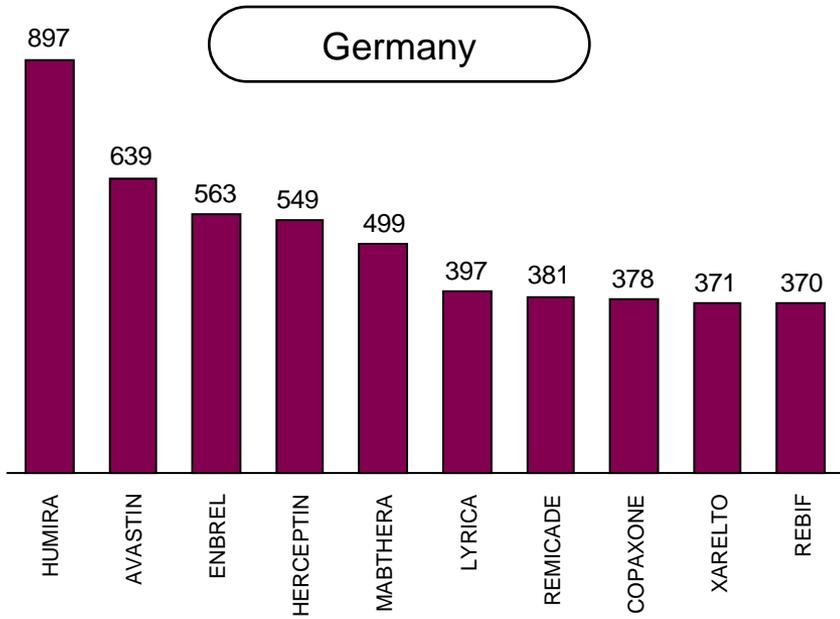
- Change in cost per treatment day, based on DDD, Q3 12 vs. Q3 11



Note: Based on seven common frequent prescribed therapy areas: Angiotensin II antagonists, anti-depressants, anti-epileptics, anti-psychotics, anti-ulcerants, cholesterol regulators and oral anti-diabetics



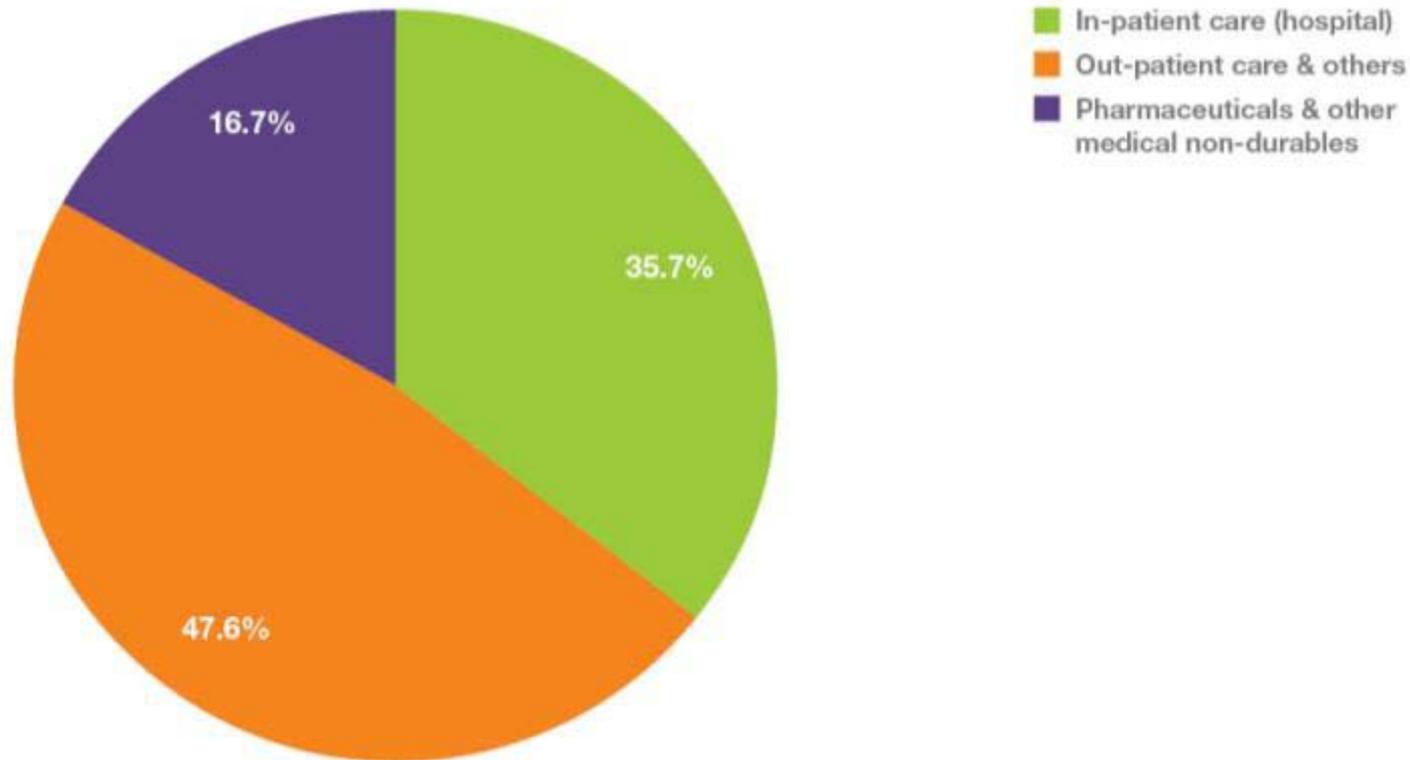
TOP-10 Brands for major European Markets (values)



Protected
 No Longer Protected
 Never Protected



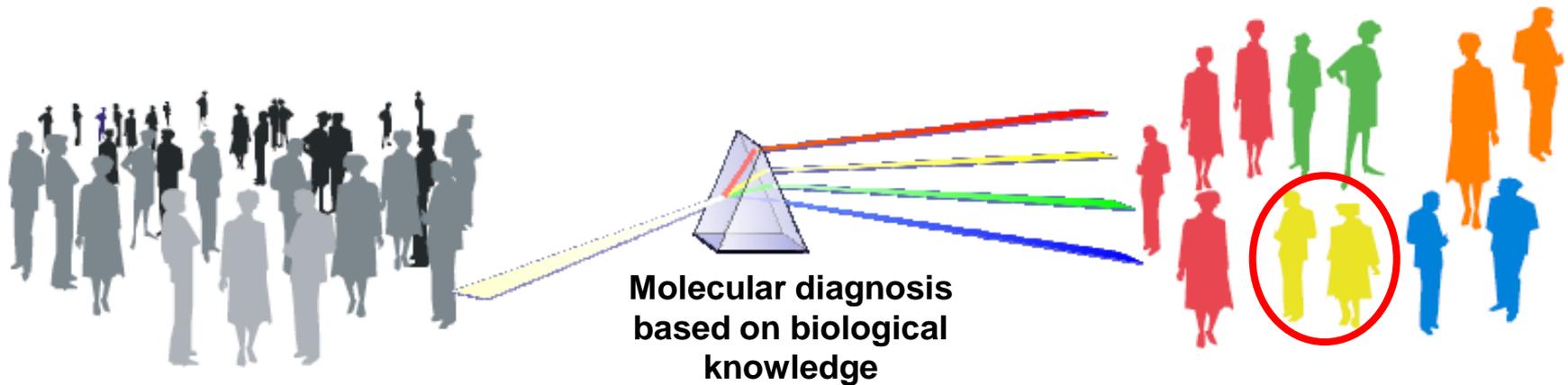
Health care expenditure in Europe



Source: OECD Health Data 2011 – EFPIA calculations (non-weighted average for 24 EU & EFTA countries)



The era of personalised medicine



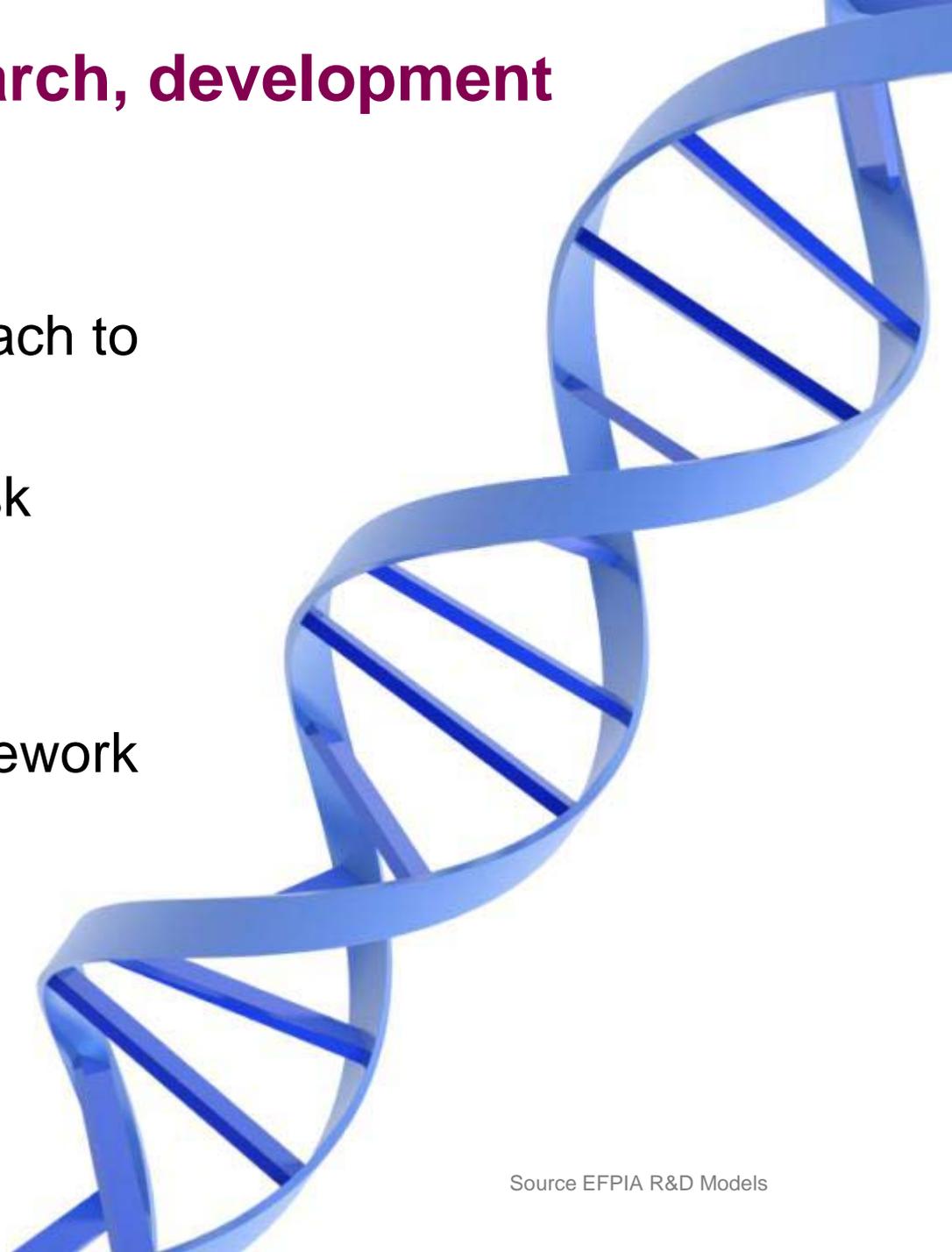
We treat a population.
Some respond and some don't

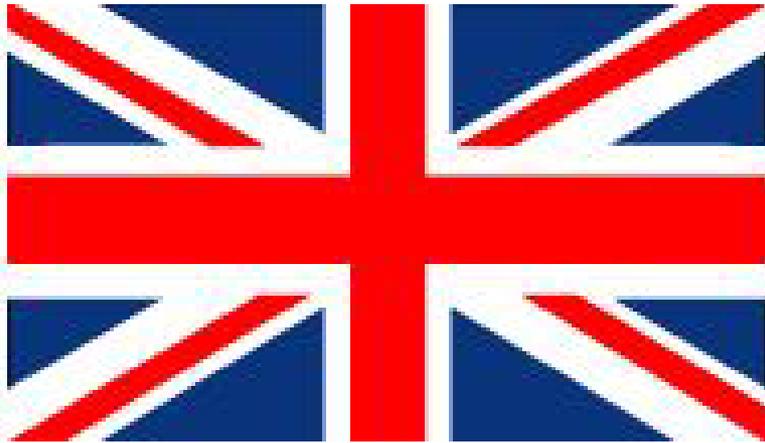
We treat a *targeted* population
They all respond

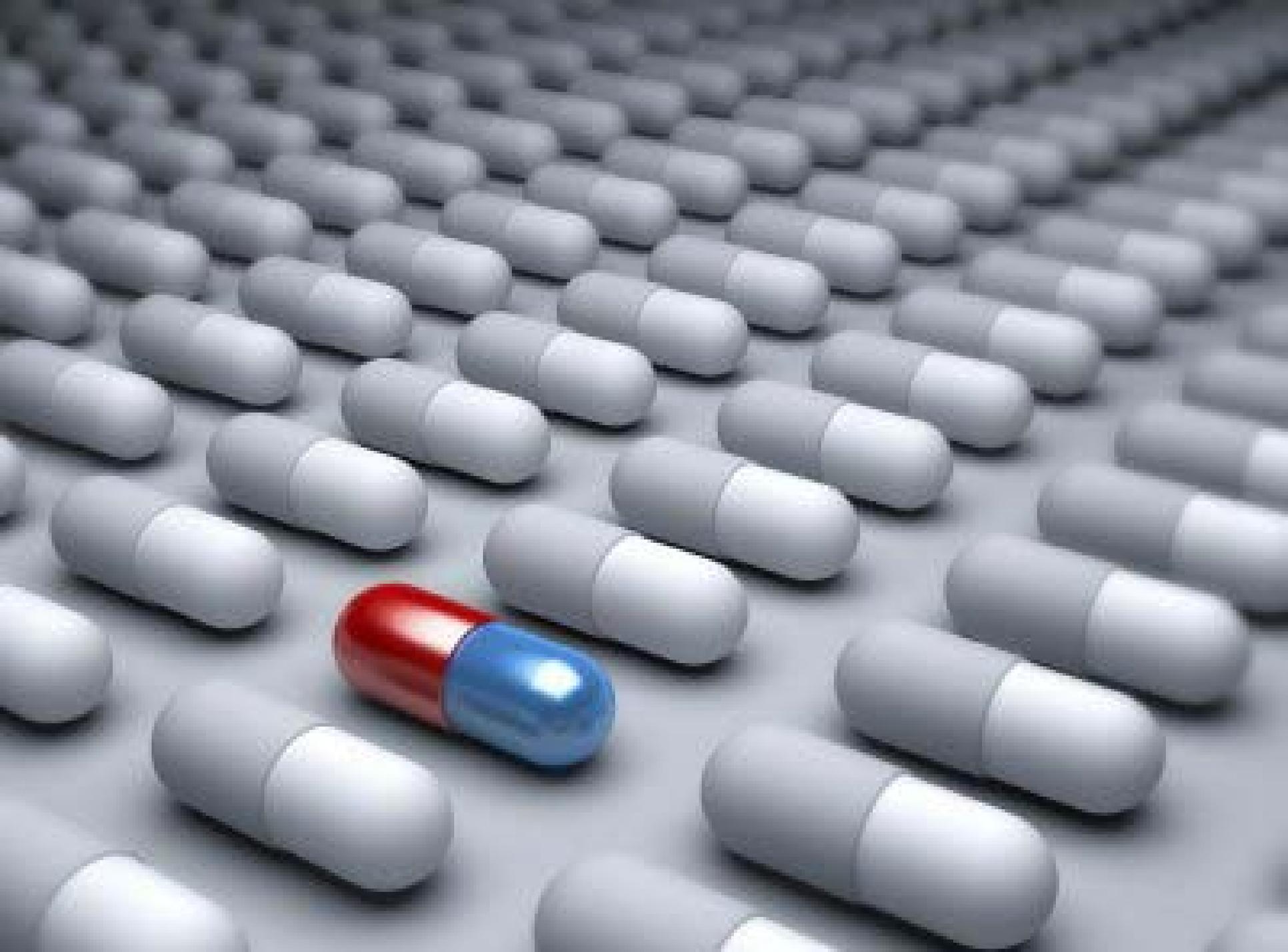


Improving drug research, development and regulation

- Molecular/genetic approach to disease classification
- Patient-centric benefit/risk evaluation
- Earlier patient access
- Adapted regulatory framework
- Novel clinical trial design







In conclusion

Innovation is critical to sustainable healthcare

We need to rethink the pathway from science to patient

It's about proving outcomes

Earlier, faster access to innovation is necessary

Close collaboration between all stakeholders is key

Trust and integrity are essential

