
MARKET ACCESS IN UKRAINE: WHAT ARE THE DRIVERS AND CHALLENGES ?

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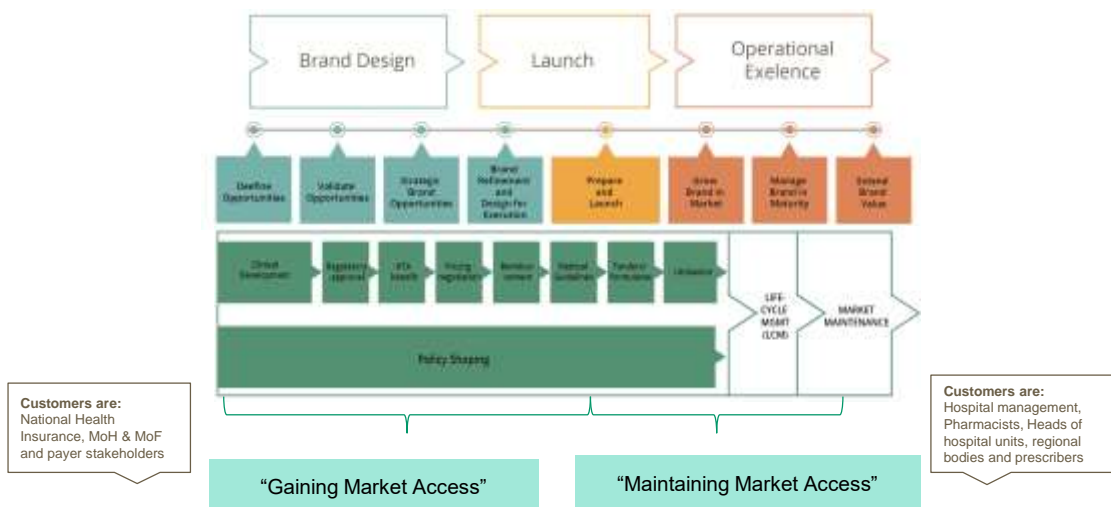
Ukraine country profile

Total pharmaceutical expenditures on medicines (private and public) in 2017:

- EUR **2.24 bn**
- **2.34%** of GDP (BMI Research)
- **15%** of public financing for medicines

International organizations (UN agencies – the United Nations Development Program, the United Nations Children's Fund and Crown Agents) purchase medicines and medical devices for 40 national programs for a total of EUR **0.19 bn**

Market access outline



LSE Market Access Academy, 2018

Public pharmaceutical providing in Ukraine

Level of procurement	Current procurement method	Pharmaceutical providing	Levels of price and volume controls	2017/2018 UAH bn	2017/2018 USD mln
National	By International agencies UNDP, UNICEF and Crown agents	487 medicines (259 INNs) for 41 disease programs	No HTA submission for inclusion in programs	5,9	210
Regional/ Hospitals	National tendering following procurements by regions and hospitals	427 INNs in regulatory list - EML, secondary & tertiary medicines	HTA for inclusion on EML, Expert committee analysis, tendering	4,8	171
Primary care	Reimbursement program "Affordable medicines"	23 INNs from EML, primary care/ outpatients	HTA , external reference pricing, budget cap	1	36
Total, values				11,7	418

Expert Committee of Ministry of Health of Ukraine

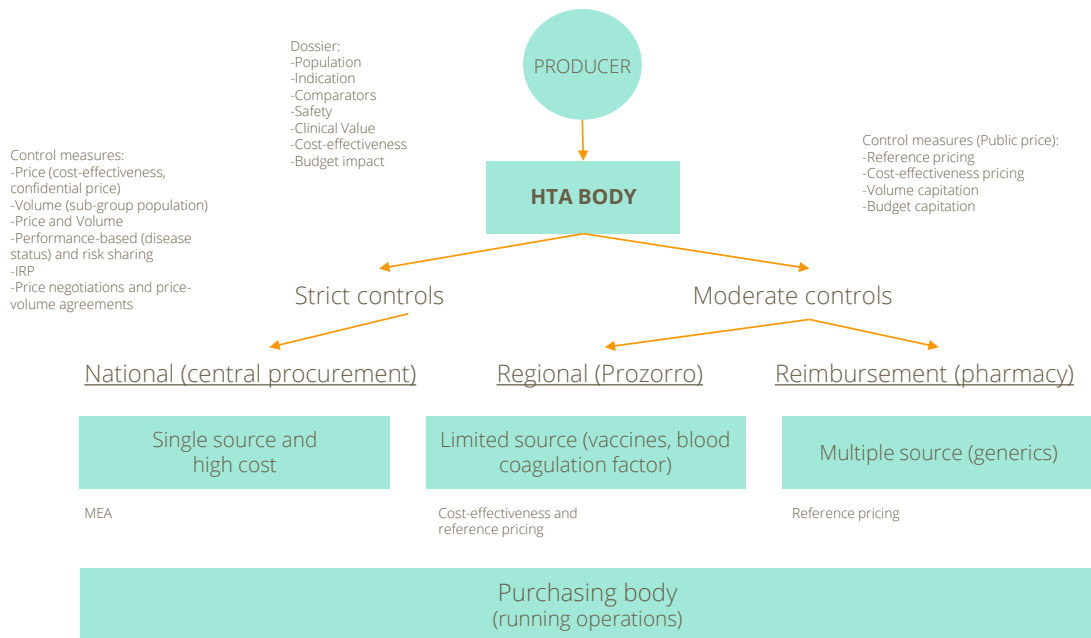
- Since 2016 conduct HTA for medicines
- Develop model of priority diseases
- There is legislation framework
- HTA based on clinical and economic analysis (CEA, BIA)
- Publicly available recommendations based on assessment of submissions
- EUnetHTA member since 2018
- Developed and published HTA guidelines in Ukraine in 2018
- Next step - creation of HTA agency



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Market access environment, strategic plan, and how to optimize access and value of medicines?

- The Accounting Chamber of Ukraine recorded cost saving up to 39% in 2017 as a result of this engagement with international procurement organizations
 - Rapid marketing authorization (up to 10 days for medicines procured via international organizations)
 - Mandatory HTA for inclusion on EML by Expert Committee of MoH
 - EML for regional procurement and reimbursement
 - Regional national tendering purchased for EUR 0.16 bn using EML
 - Reimbursement program "Affordable medicines" was EUR 23.3 mn by State Budget funding in 2017
 - ERP is used for reimbursement program
 - Establishment of Central procurement organization (October 2018)
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Conclusions and future directions

- Efficient procurement in Ukraine needs to be activated in a synergistic manner based on the international practice: pharmaceutical policy, legislation, stakeholder collaboration and involves more than just obtaining the lowest price – it is about creating a healthy market where high-quality products are available at the right time at affordable prices and at the right quantity.
- Additional instruments can be used to improve efficiency: using of generics/biosimilars, creating a competitive market through therapeutic tenders.
- Introduction of managed entry agreements for innovative medicines.

Conclusions and future directions

- Develop new reimbursement and price reference models.
- Consider co-payments based on patient characteristics and socioeconomic status, referencing of the SKU.
- Integration HTA for all levels of public procurement.
- Define processes between CPA and HTA.
- Perspective European scientific and technical cooperation!

Thank You for attention!



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