



Review of Oncological Treatment Accessibility in Slovakia

Final report

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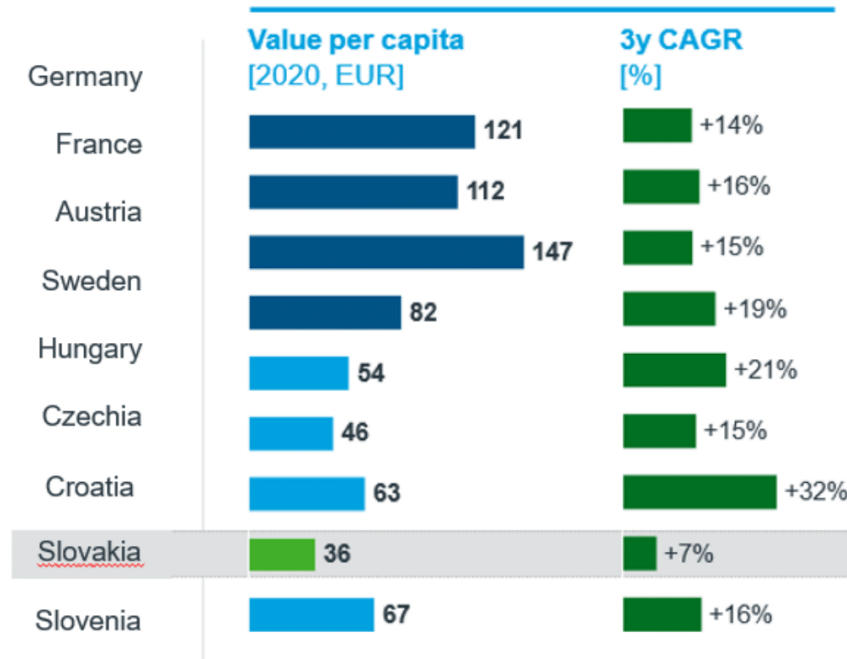
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Slovakia held the last place in terms of Oncological value per capita in comparison with all selected countries

Oncology and its market dynamics

2



Comment

- **Slovak Oncology growth** in value between 2017 and 2020 was **low in comparison with its Peers** – having average CAGR 21%
- In terms of **value per capita**, Slovakia held **the last position** with value almost 40% lower than average of its Peers

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Slovak spending both on Oncological and Innovative Oncological treatment is lagging behind other European countries

Note: Oncology market defined as: L1, L2, V3C, Xgeva, Proleukin

Source: IQVIA MIDAS, IQVIA sell-in, Eurostat (DEMO_GIND) (Accessed on 29 April 2021)

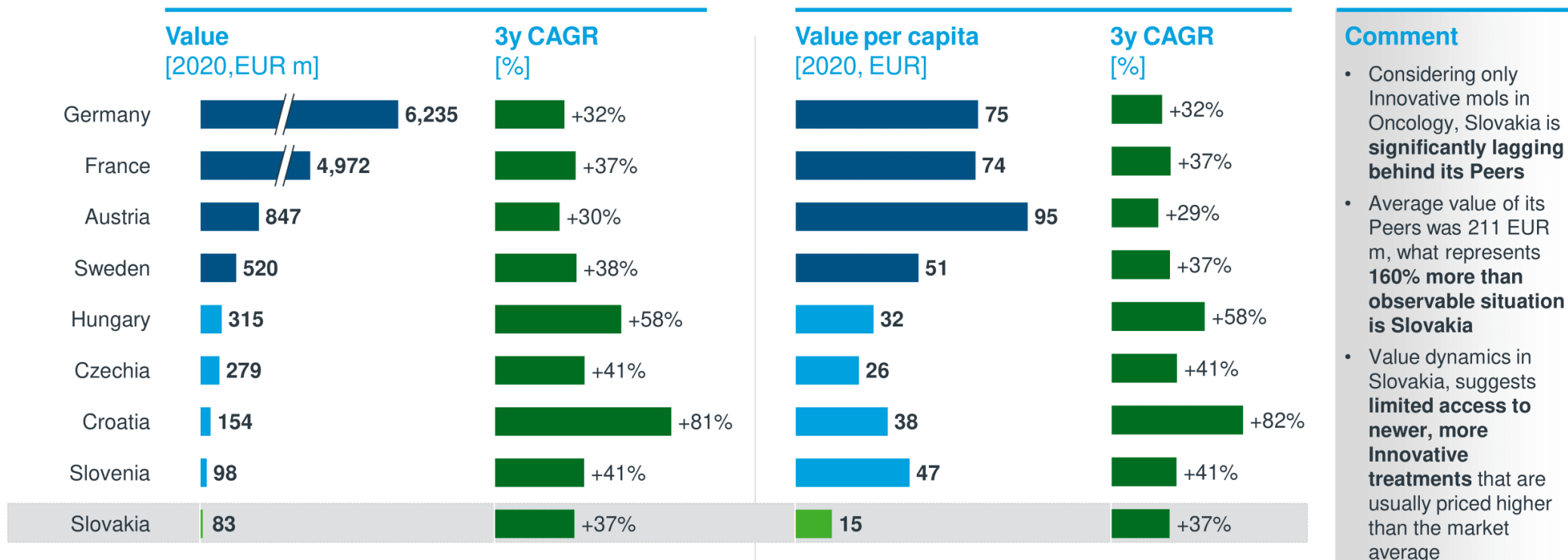
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● Market leaders ● Peers ● Slovakia

Spending on Innovative Oncological molecules in Slovakia was lower than in any other benchmarked country

Innovative molecules in Oncology and its market dynamics

2



2

Slovak spending both on Oncological and Innovative Oncological treatment is lagging behind other European countries

Note: List of Innovative molecules in Oncology was provided by AIFP and it includes 95 Innovative products/ molecules approved by EMA between 2011 and 2020

● Market leaders ● Peers ● Slovakia

Source: IQVIA MIDAS, IQVIA sell-in, Eurostat (DEMO_GIND) (Accessed on 29 April 2021)

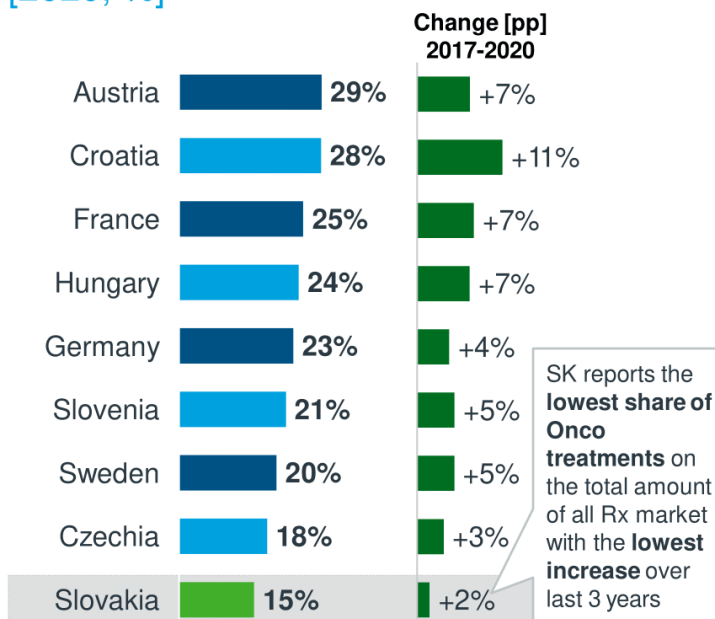
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Share of Innovative molecules in Oncology was significantly lower than in any other benchmarked country

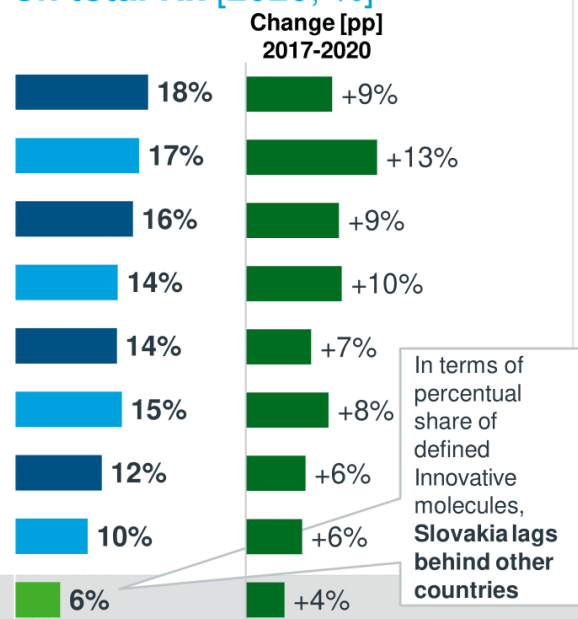
Oncology vs total Rx market

3

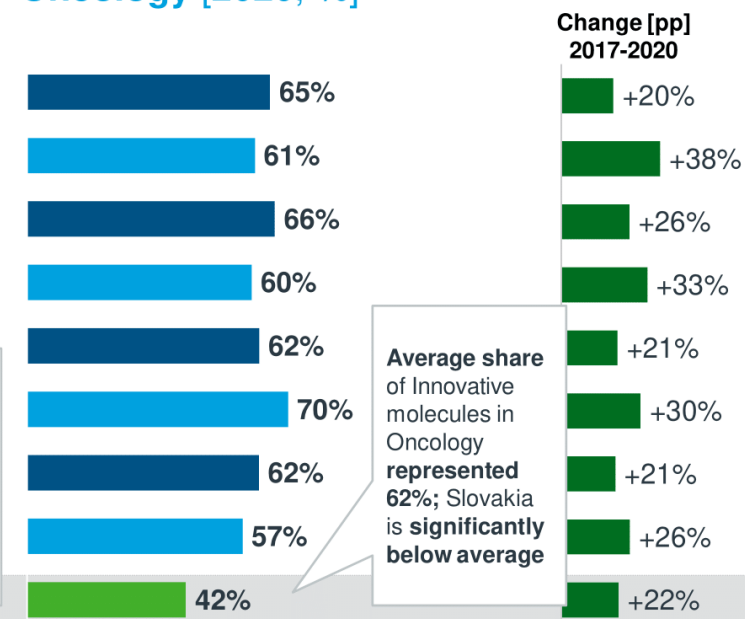
Share of Oncology on total Rx [2020, %]



Share of Innov. Onco mols on total Rx [2020, %]



Share of Innov. Onco molecules on total Oncology [2020, %]



3

The share of Innovative Oncological treatments on the overall Oncological consumption is lower in comparison with other European countries

● Market leaders ● Peers ● Slovakia

Source: IQVIA MIDAS, IQVIA sell-in

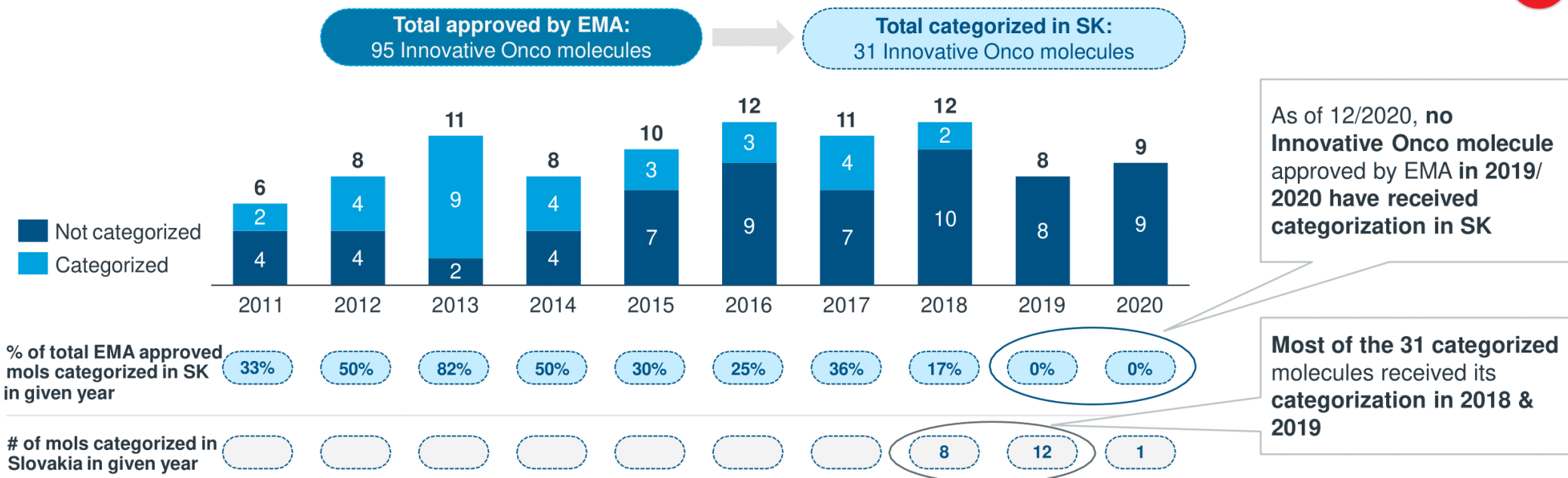
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Out of 95 Innovative Oncological molecules approved by EMA since 2011, 31 have been categorized in Slovakia

Approved Oncological molecules by EMA vs categorized in Slovakia

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Year of EMA approval and categorization status in Slovakia [as of December 2020, # of molecules]¹⁾



4 Low share of total Oncological molecules approved by EMA are categorized (not only via exception)

Note: 1) Analysis includes only Innovative molecules in Oncology defined by AIFP (95 Innovative products/ molecules approved by EMA between 2011 and 2020); As of March 2021, no more innovative molecules received categorization

Source: IQVIA, EMA, MoHSK

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