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### The French Pharma Market 2024 - 2029

## **Strategic Implications for Pharma Companies**

"A rigorous analysis of the facts to support the strategic thinking of pharmaceutical companies"

#### 434 illustrated slides

#### Mapping of key stakeholders PAYERS ssues MA for EU GOVERNMEN' POLICY ANSM HAS (CT) CEPS Stakeholder behavioral trends: Policy makers & Payers (1/3) 2024 - 2029 Trends Tighter reimbursement restrictions Stricter control of reimbursed drugs expenditure Number of indications Measures to boost generics, biosimilars & hybrids Volume per indication Number of targeted patients Strong willingness to better control the National Health Insurance Fund deficit, over the long-term Drug cost containment measures: - 2024 deficit estimated at € 18.1 B (vs. € 10.7 B in 2023) Managed care agreements for innovative drugs - 2025 ONDAM set at € 265.9 B (+3.5% vs. 2024) Stronger pressure on established brands · Accelerated price cuts over time for reimbursed drugs - 2025 safeguard clause triggered for Drugs sales forecast by segment (2019 - 2024 - 2029) CAGR 2019-2024 Mo Po 53.8 +6.4% +4.0% Bet 44.2 +5.0% Hospital sales +6.4% 40 32.5 2.3 +2.6% +1.8% 5.5 2.1 Biosimilars -0.6% -3.0% 20 Reimbursed originators atent-protecte +7.8% +4.0% and other

2029

34.0

■ Retail sales

+6.3%

+3.5%

2019

21.0

2024

28.6

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