

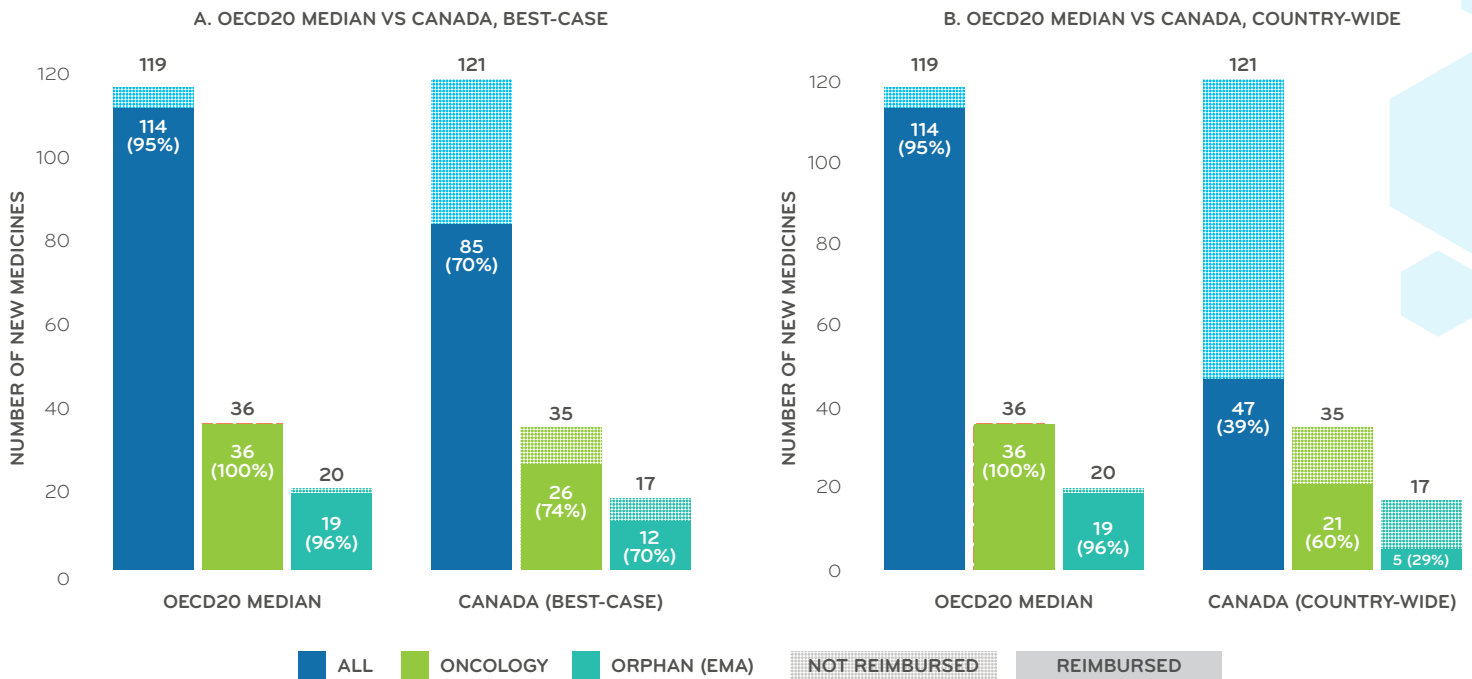


Canada's public plans cover fewer new medicines and take longer than most OECD countries to approve them

PUBLIC PLANS IN CANADIAN JURISDICTIONS COVER FEWER NEW MEDICINES THAN OTHER COUNTRIES - EVEN IN THE BEST-CASE SCENARIO*

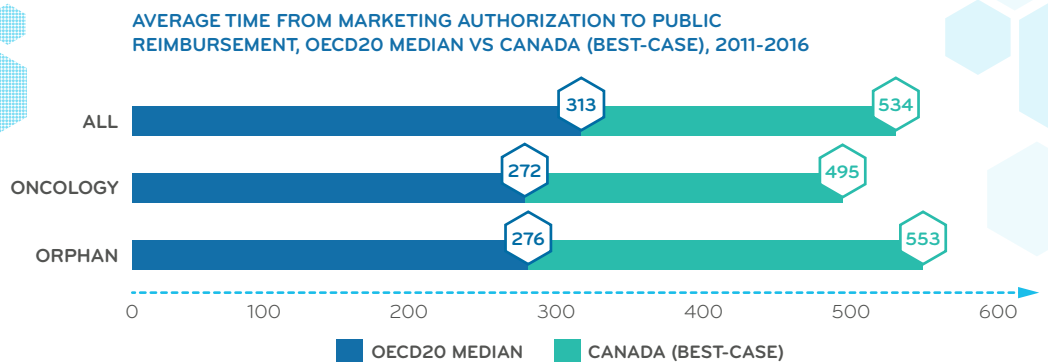
Between 2011-2016, Canadian jurisdictions covered fewer new medicines than the median of 20 comparable OECD countries. In the best-case scenario*, 70% of available medicines were covered. Country-wide**, this figure fell to 39%. For orphan drugs (used to treat patients with rare diseases) the gap was even larger.

TOTAL NUMBER OF LAUNCHED AND PUBLICLY-REIMBURSED NEW MEDICINES, OECD20 MEDIAN VS CANADA, 2011-2016



CANADIAN JURISDICTIONS' PUBLIC PLANS TAKE LONGER TO APPROVE NEW MEDICINES COMPARED TO OTHER COMPARABLE COUNTRIES

The lag time between when a new medicine is approved for use in Canada to when it is covered under a public drug plan was nearly twice as long as the median of 20 comparable OECD countries, even in the best-case scenario*.



Note: Latest available MIDAS data at the time of analysis. For international data, a 2-year lag between data year and published literature is normal. An update to this analysis with more recent data is planned in 2019. Data did not allow for accurate capture of country-wide public reimbursement timelines.

*Canada (Best-case) = Public reimbursement in at least one provincial reimbursement list covering at least 20% of the Canadian publicly-covered population.

**Canada (Country-wide) = Public reimbursement in a number of provincial reimbursement lists cumulatively covering at least 80% of the Canadian publicly-covered population.

Source: IQVIA MIDAS, new molecular entities with market authorization between 2011-2015, launch and public reimbursement between 2011-2016. Orphan = EMA designated. OECD20 = Australia, Austria, Belgium, Canada, Finland, France, Germany, Ireland, Italy, Japan, Netherlands, New Zealand, Norway, Portugal, South Korea, Spain, Sweden, Switzerland, United Kingdom, United States. OECD20 Median = The middle number of NMEs out of the 20 OECD countries selected in this analysis (excluding Canada), or the middle average days out of the 20 OECD countries selected in this analysis (excluding Canada). For each measure, the OECD20 Median could represent a different country.