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ASSOCIATION GÉNÉRALE DE L'INDUSTRIE DU MÉDICAMENT
ALGEMENE VERENIGING VAN DE GENEESMIDDELENINDUSTRIE

Belgian pharma figures 2015, in a European perspective

The Belgian pharmaceutical industry
strengthens its leading European position

INTRODUCTION

*In 2015, Belgium continued to reinforce its leading position in Europe as a biopharmaceutical hub. This becomes apparent when comparing a number of key indicators in 2015 with figures of the previous year. Belgium showed a growth well above the European average, in particular with regard to **investments in R&D (+5.5%) and the employment of researchers (+2.86%)**.*

Furthermore, Belgium remains a very important European player in the production and export of medicines and vaccines. Belgium exported biopharmaceutical products worth over 41 billion euros in 2015, representing no less than 14% or 1/7th of Europe's total exports.

*Such accomplishments are only possible thanks to great teams and a supportive legislation. For years, the pharmaceutical industry has been considered to be **one of the most attractive employers and a magnet for talents**. The industry counts today nearly 35,000 employees and more researchers than ever before.*

Belgium is also an attractive environment to conduct clinical studies. The current legislation allows the country to rapidly approve applications to set up clinical trials. Belgium is ranked 2nd in Europe based on the number of clinical studies per capita.

The Pact of the Future, concluded in July 2015 between the Belgian federal government and the pharmaceutical industry, provides a predictable and reliable framework up until 2019, that encourages the R&D of new and innovative medicines. Nevertheless, additional efforts and support will be required to maintain Belgium's leading position in Europe.

BELGIUM AMONG THE EUROPEAN LEADERS IN PRODUCTION AND EXPORT

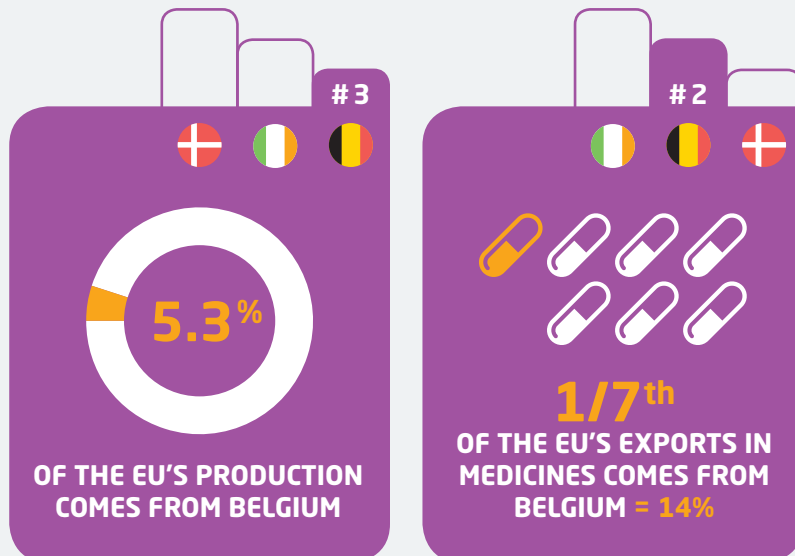
Although Belgium's share in Europe's population is only 2.2%, and in Europe's GDP just 2.9%, the pharmaceutical industry in Belgium scores considerably higher on a number of important economic parameters.

The production by Belgian pharmaceutical companies represents **5.3%** of the total European production.

Belgium moved one place up in the European ranking and is now **the 3rd biggest producer of medicines and vaccines** per capita, after Denmark and Ireland.

A large part of this production is exported across the world. In 2015 Belgium's exports of **medicines and vaccines** were worth **over 41 billion euros**, which is equal to 14% or **1/7th of the total European exports of biopharmaceutical products**. This outstanding position leads Belgium to the **2nd position** among all EU member states, after Ireland.

BELGIUM'S POSITION IN EUROPE

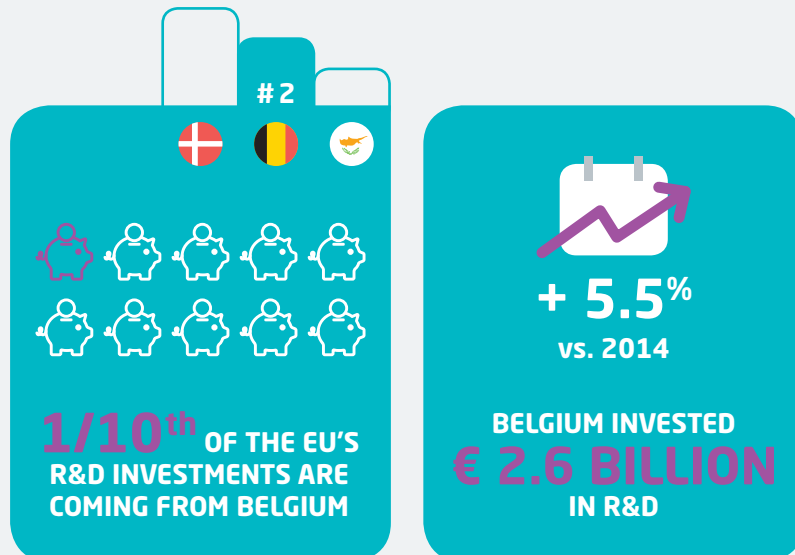


BELGIUM: A POLE OF ATTRACTION FOR R&D

The cross-fertilisation among pharmaceutical companies and academic research centres on the one hand, and the industry's efforts to employ highly qualified researchers in their R&D centres on the other hand, allowed Belgium to reinforce in 2015 its leading position in R&D within Europe.

In comparison with the previous year, investments in R&D climbed 5.5% in 2015, as to an average of 1.98% in the other 27 EU member states. In Belgium this has led to a total amount of **2.6 billion euros of R&D investments** by the industry. When comparing to the population size, **Belgium is 2nd** after Denmark in investing the most in pharmaceutical R&D, leading to more jobs for qualified researchers.

BELGIUM'S POSITION IN EUROPE



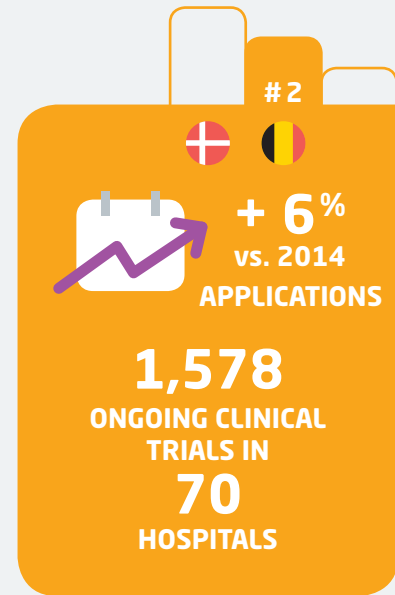
By specialising mainly in the research and development of new medicines, Belgium is positioning itself more and more as a "laboratory of hope" for its patients. The good collaboration between the industry and the universities and relevant spin-offs plays a key role.

*Catherine Rutten,
CEO of pharma.be*

BELGIUM'S LEADING POSITION IN EUROPE IN CLINICAL TRIALS

In Europe it is nearly impossible to find other countries with as many clinical trials running as in Belgium. The number of **clinical trial applications rose with 6%** in 2015 (484 applications compared to 458 in the previous year). This has led to an impressive total of **1,578 clinical trials in 2015** across all phases. **Belgium ranks 2nd** in Europe based on the number of clinical studies per capita.

This leading position means that patients in Belgium can quickly access innovative, promising and often very personalised treatments. The fact that Belgium has many strengths is mainly thanks to the **strongly anchored pharmaceutical ecosystem** and the high clinical expertise of over **70 hospitals**. Furthermore, Belgium is known for its **rapid approval procedures** to apply for clinical trials. This advantage in speed makes Belgium an attractive place to carry out clinical trials.



*Even though Belgium holds a leading position in clinical trials, we should not rest on our laurels. Indeed, in late 2018 a **new European regulation** will be adopted to ensure the harmonisation of the request and approval procedures for clinical trials. The initiatives in the Pact of the Future should allow us to maintain our key position in clinical studies.*

Catherine Rutten,
CEO of pharma.be

*Belgium's leading position gives patients the opportunity to **benefit from early access to innovative techniques and treatments**. The superb collaboration between the pharmaceutical industry, the government, the healthcare sector and the academic world means that patients can count on a professional treatment, as well as the chance to participate voluntarily to new and unique therapies.*

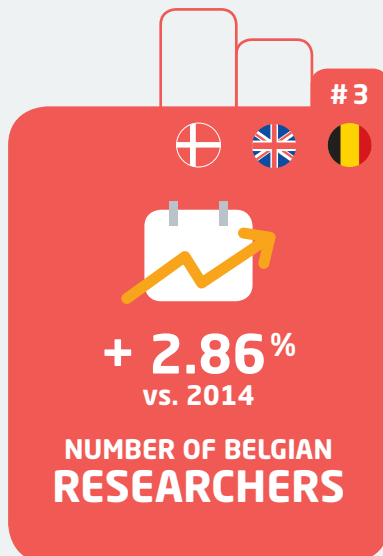
By volunteering to clinical trials, patients also have the feeling that they offer society something in return. It is the only way to have new medicines on the market. Such altruistic behaviour is absolutely crucial and is mainly seen in clinical studies among healthy volunteers (e.g. for vaccines). Without this altruistic attitude there would be no volunteers and no further development of new medicines. It is important that the government, the academic world and the pharmaceutical industry take this more into consideration.

Prof. Dr. Pierre Van Damme,
Antwerp University

PHARMA AS AN ATTRACTIVE EMPLOYER

The pharmaceutical sector is a significant source of jobs: the industry employs almost 35,000 people in our country, of which **4,200 researchers**. The number of researchers has grown by **2.86%** since 2014, while the number across Europe has been in decline (-0.04%). Only in Denmark and the UK are there more researchers.

The appeal of the pharmaceutical sector is also confirmed by the annual results of the Randstad Awards, designed to award the most attractive employers. The Randstad survey results in 2015 showed that pharmaceutical companies occupy no less than 4 positions in the top 5 ranking. In the past **15 years**, a pharmaceutical company was chosen **9 times** as **most attractive employer**, and the sector was almost always voted as most attractive industry to work for. Pharmaceutical companies also rank high on other indexes related to HR.



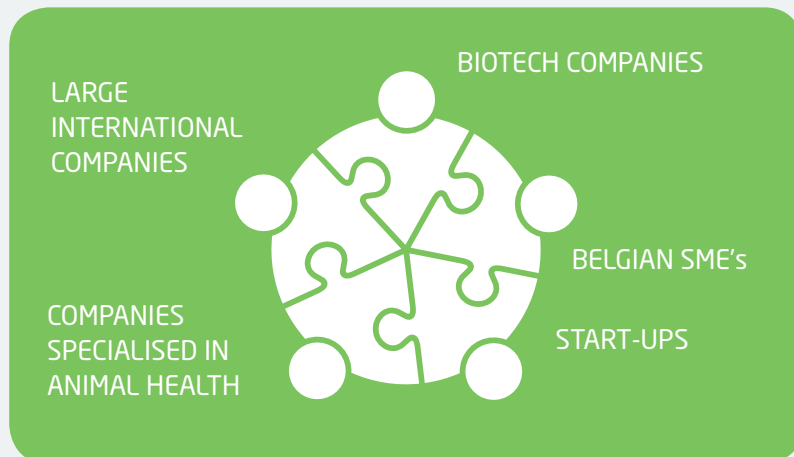
FORCE FROM ITS DIVERSITY AND INNOVATIVE NATURE

Compared to other countries there are many (bio)pharmaceutical companies active in Belgium: a total of over 200 companies spread over the two parts of the country.

Belgium has a pharmaceutical ecosystem with strong foundations that stands out for its great diversity. The Belgian pharma valley includes large international companies, but also Belgian SMEs, start-ups, biotechs and companies specialised in medicines for animals.

These companies are active in a diverse range of activities, such as fundamental and clinical research, production, distribution, export and commercial activity.

The cross-fertilisation among these various segments is a real asset and also extends to other companies and institutions, such as university research departments, hospitals, CROs coordinating clinical research and logistical partners taking care of distribution.



The pharmaceutical sector is one of Belgium's most innovative sectors. We need to cherish this advantage. In my opinion, it is crucial to maintain the current fiscal benefits for those working in research. They could even be extended to a wider range of employees, allowing businesses and organisations to keep the costs of innovation down. In addition, as part of the debate around company tax, the investment rebate for R&D must be maintained.

*Pieter Timmermans,
CEO of the Federation of
Enterprises in Belgium (FEB)*

THE PACT OF THE FUTURE 2015-2018: WORKING TOGETHER TO THE PATIENT'S BENEFIT

In 2015 the federal government and the pharmaceutical industry in Belgium concluded the unique, historical and ambitious "Pact of the Future" for the patient, aiming to **maintain Belgium's position as a strong pharma valley in Europe**.

This pact contains dozens of measures and is currently being implemented. It provides to pharmaceutical companies a **predictable and reliable framework until 2019**, stimulating the research and development of new and innovative medicines, to the patient's benefit.



Figures relating to Belgium's position in Europe: when Belgium is compared to other EU countries, the indicators take into account each country's share in the total EU population.

Sources:
EFPIA, Eurostat, pharma.be (pharma figures 2015).

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The major contribution of the Belgian pharmaceutical industry to the budget measures for 2017 represented half of the savings in the healthcare sector (452 million euros) and demonstrates the priority of the industry for a sustainable and high quality healthcare system. The industry showed its responsibility based on agreements within the Pact of the Future.

*Catherine Rutten,
CEO of pharma.be*

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