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Belgium as clinical trial location in Europe

Key results for 2019

17 November 2020

Introduction

Objective of the study

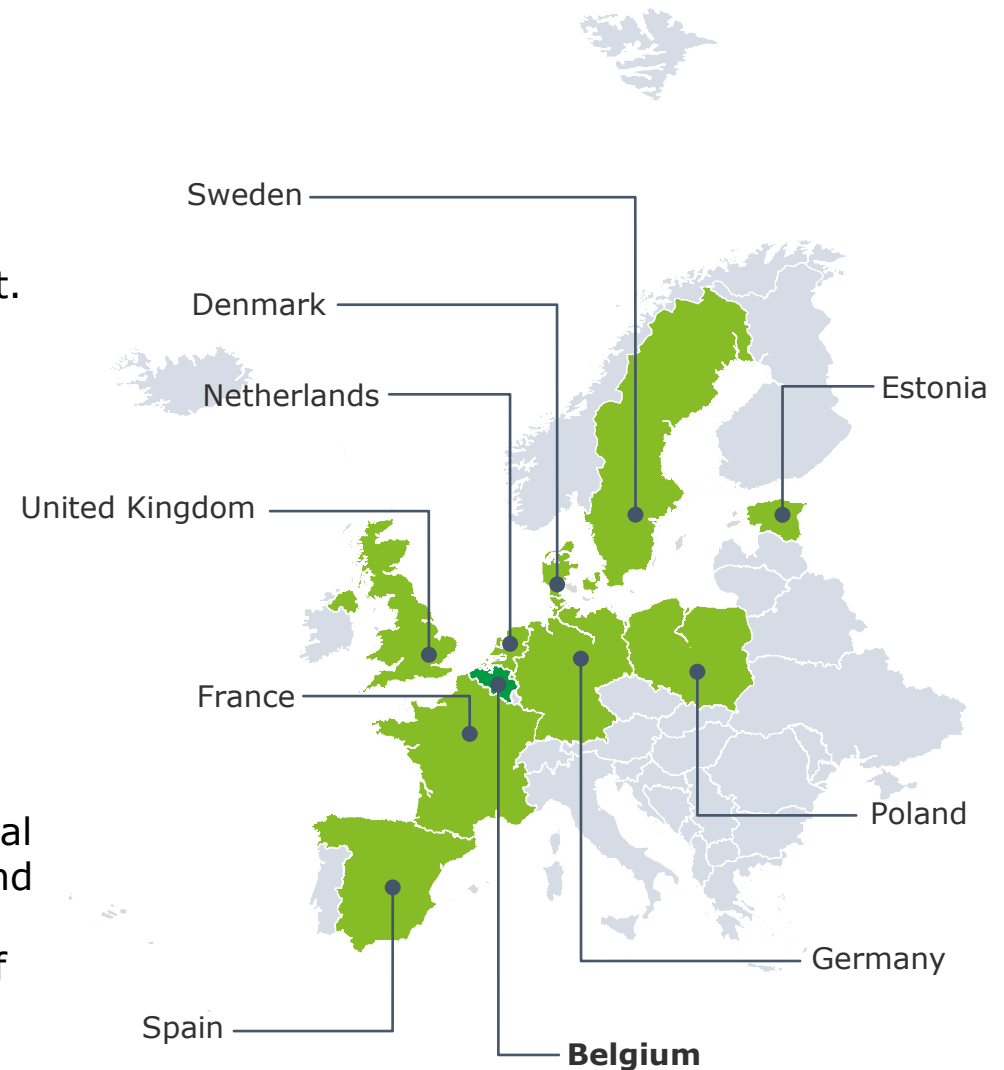
Provide key statistics on clinical trials in Belgium and perform a benchmark of Belgium as clinical trial location in Europe for the year 2019. This slide deck is an extract of a more detailed report.

Data sources

- Clinical trial authorisations (CTA) – FAMHP
- Demographic statistics – Eurostat
- Annual reports of country cohort's competent authorities
- Pharma.be member survey

Data assumptions

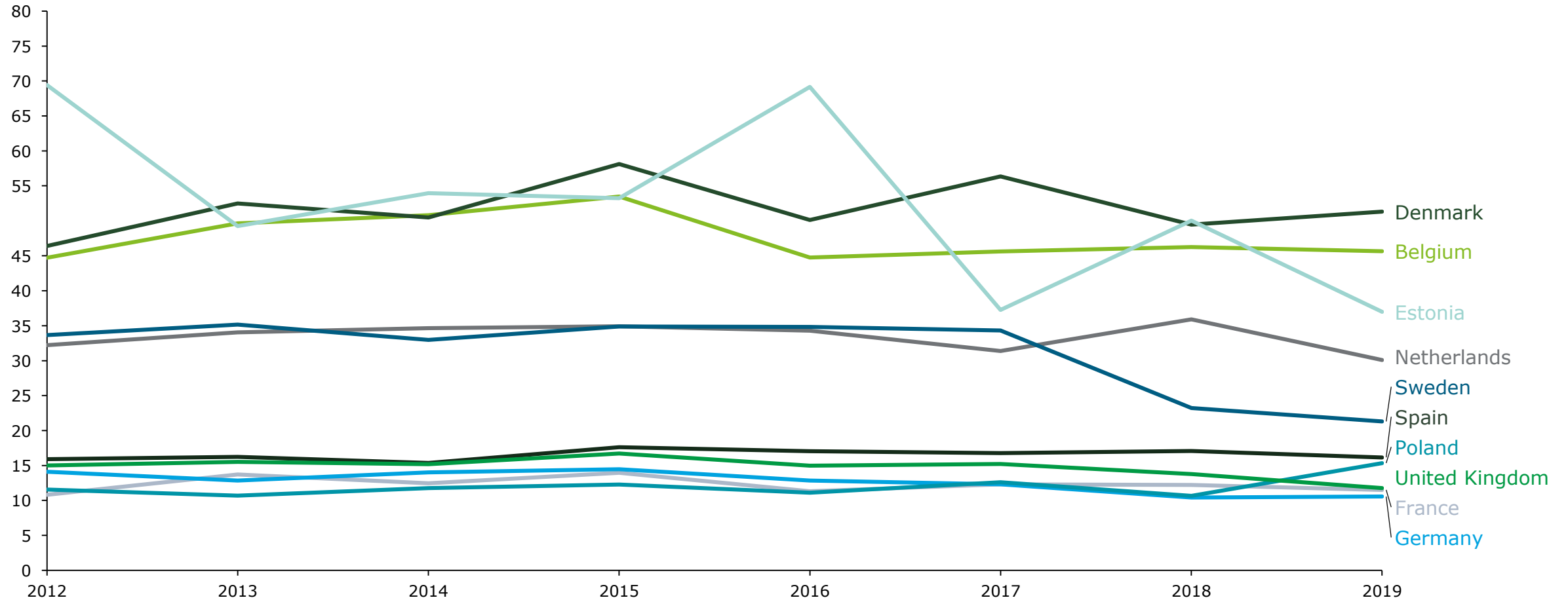
A clinical trial is considered authorized if approved by the National Competent Authority (NCA). For the information on the phase and the non-commercial status of clinical trials in Belgium, available data in the FAMHPs internal database is used. The correctness of all figures depends on the quality of the data provided by the sponsors and the actions of all NCAs to keep the European database up-to-date.



Clinical trials

Evolution of clinical trial authorisations in selected European Countries: Belgium confirms its position in the top 3 through the years

Evolution of CTAs per 1 million capita in cohort countries, 2012-2019

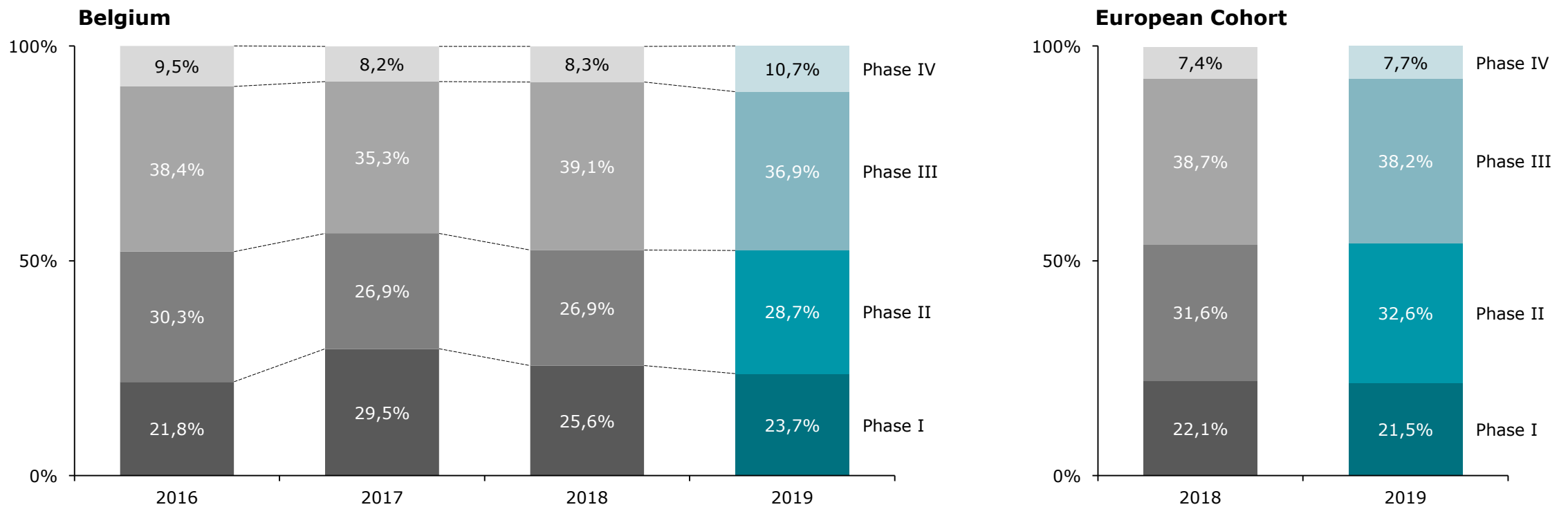


Source: Monitor Deloitte analyses based on National Medicines Agency's reports, FAMHP-data, and Eurostat

Clinical trials in Belgium

Despite a decrease in proportion of phase 1 trials for the second year in a row, the Belgian proportion of phase 1 trials is still above the European cohort, sign of strong expertise in this field

Percentage of CTAs per phase in Belgium (2016-2019) compared to European cohort (2018-2019)

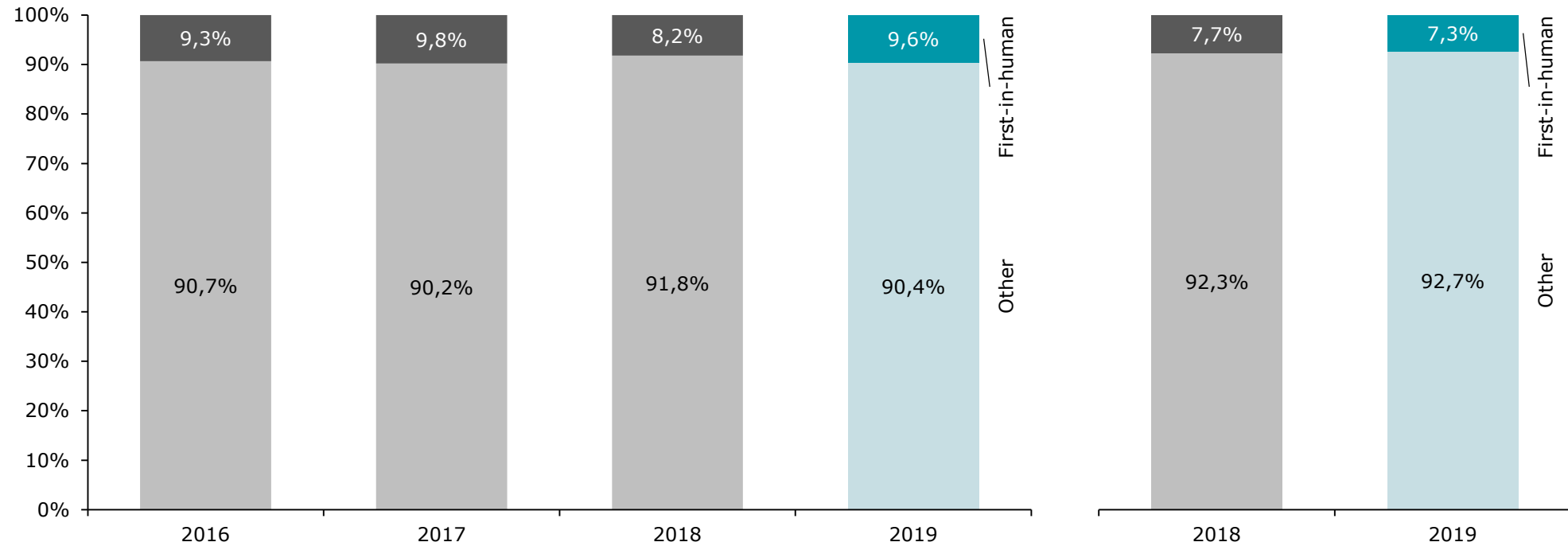


Source: Monitor Deloitte analyses based on FAMHP data

Clinical trials in Belgium

The proportion of first-in-human CTAs in Belgium is stronger compared to the European cohort

Percentage of CTAs that are first in human in Belgium (2016-2019) compared to European cohort (2018-2019)

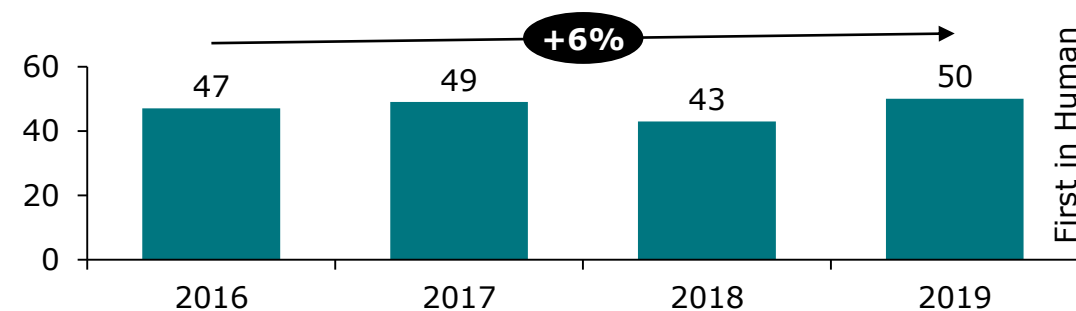
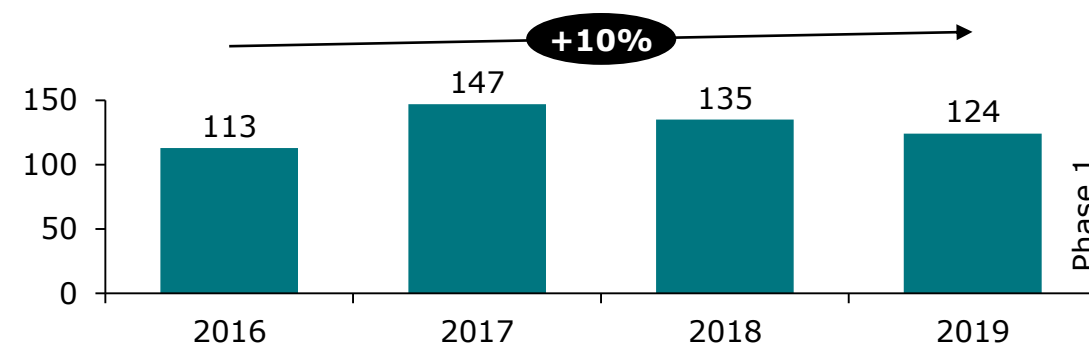
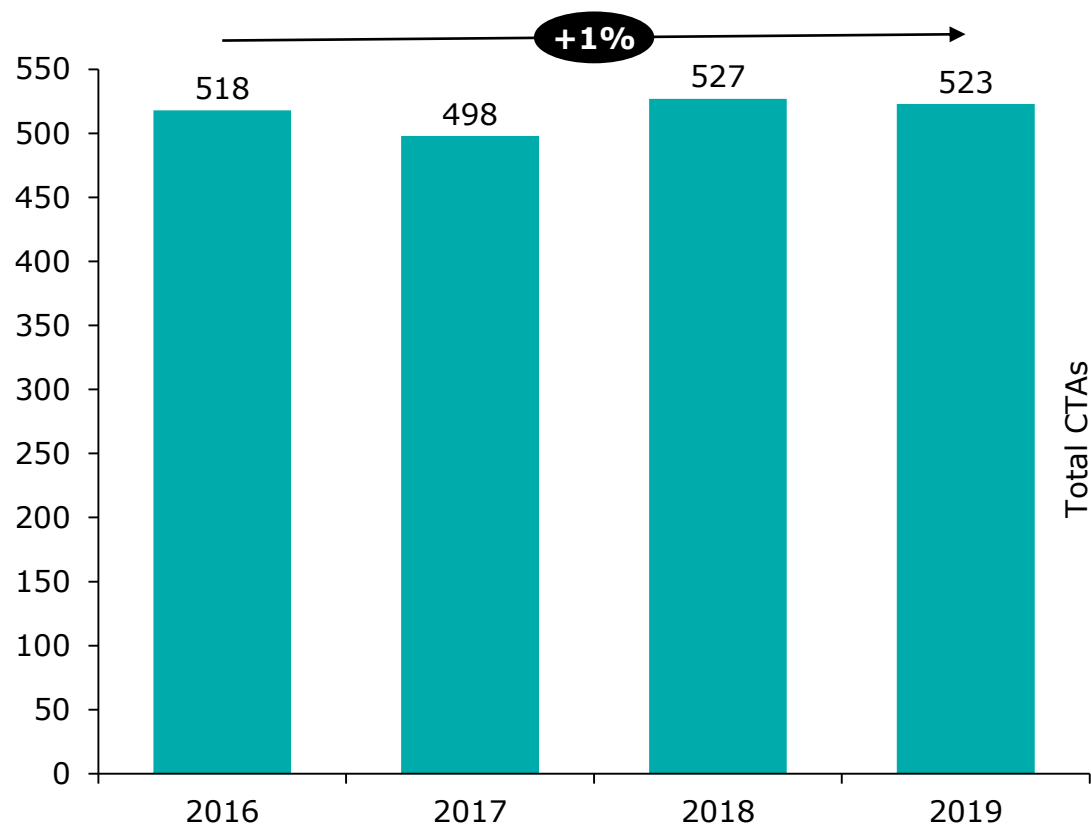


Source: Monitor Deloitte analyses based on FAMHP data

Clinical trials in Belgium

Phase 1 and First in Human clinical trials grow at a faster pace compared to the overall number of clinical trials in Belgium

Comparison of growth in CTA volume in Belgium, absolute number of all CTAs vs. phase 1 CTAs vs. First in Human (2016-2019)

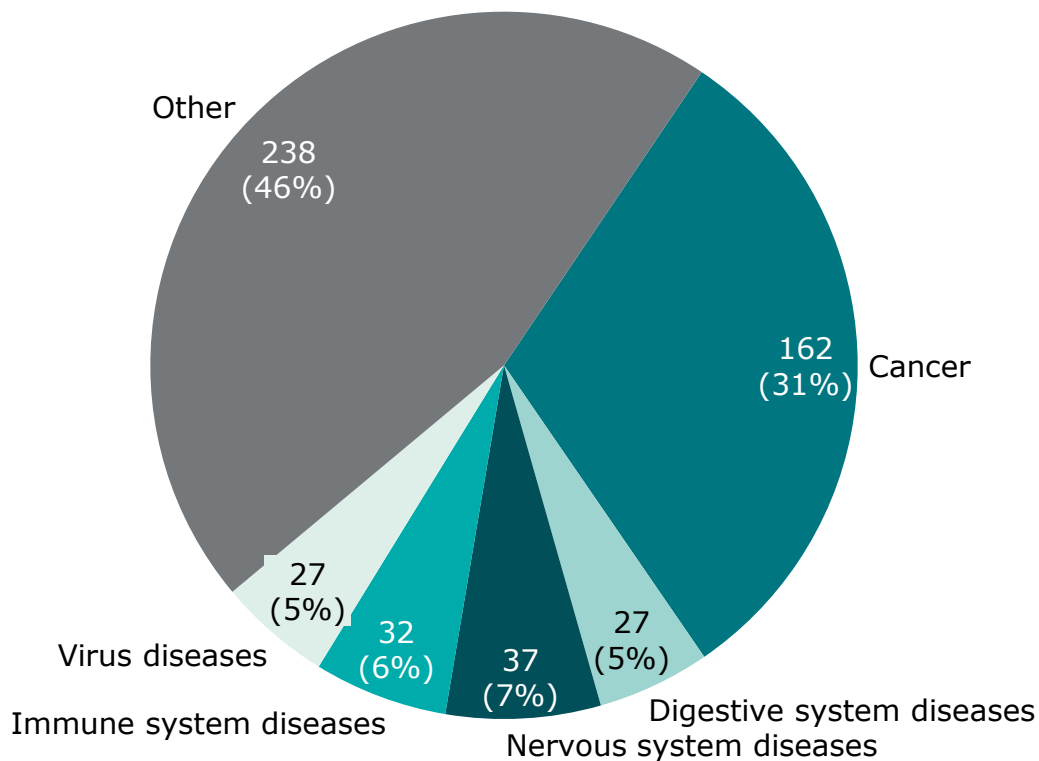


Source: Monitor Deloitte analyses based on FAMHP data

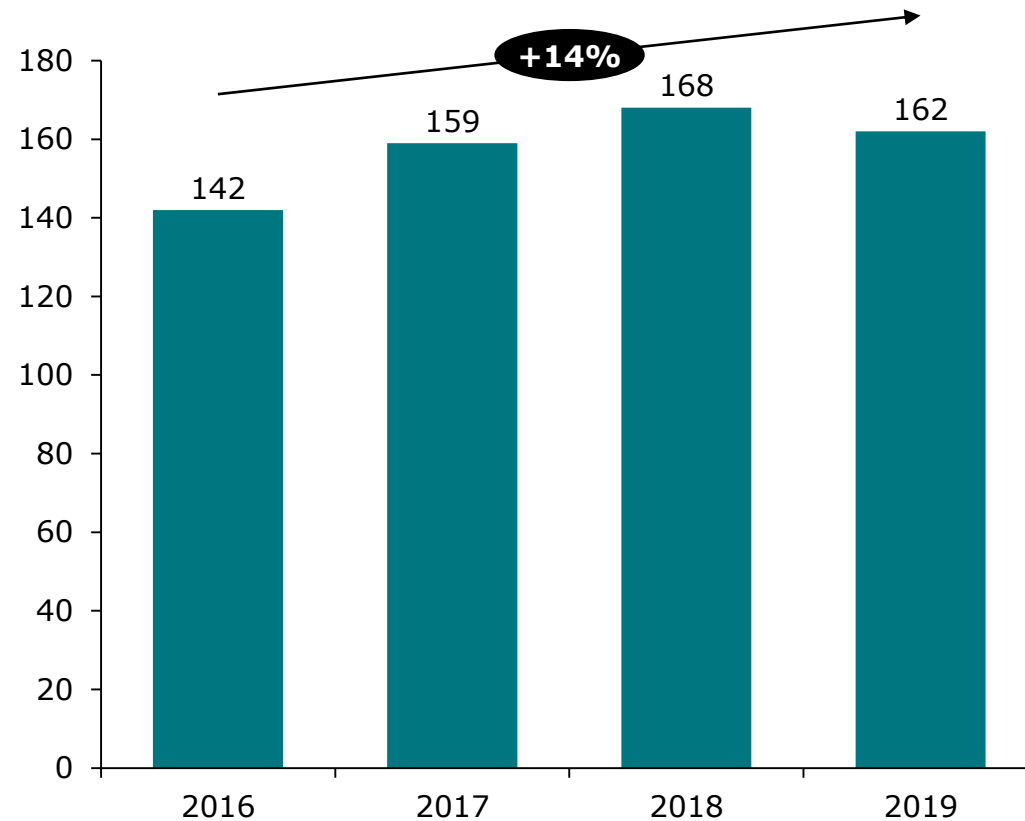
Clinical trials in Belgium

A wide variety of therapeutic areas is covered with an increase expertise in cancer research over the past 4 years

Proportion of CTAs for selected disease areas in Belgium (2019)



Evolution of CTAs for cancer in Belgium (2016-2019)

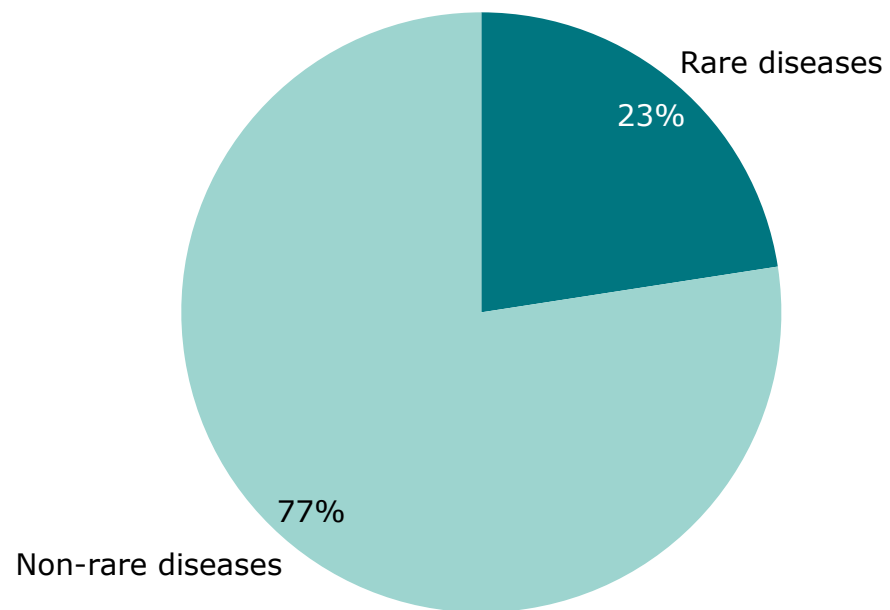


Source: Monitor Deloitte analyses based on FAMHP data

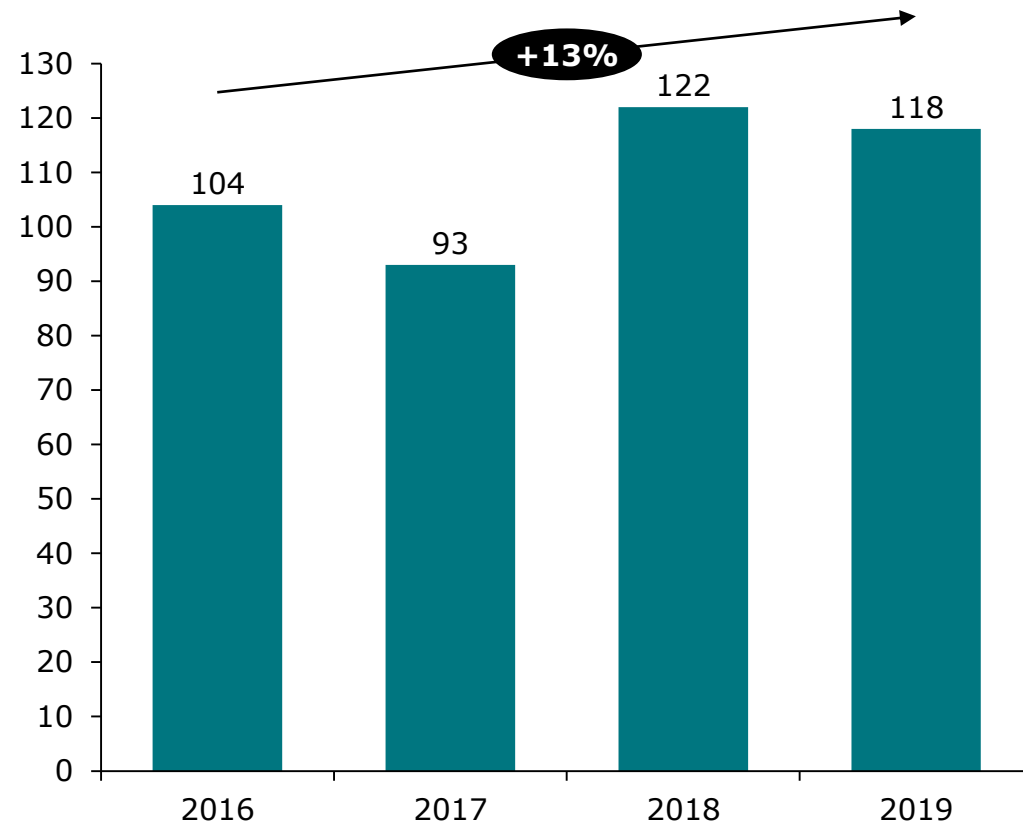
Clinical trials in Belgium

Despite its population size is more than 1 out of 5 clinical trials authorised in Belgium conducted in the domain of rare diseases

Percentage of CTAs in rare diseases authorised by the FAMHP in Belgium (2019)



Evolution of number of CTAs in rare diseases in Belgium (2016-2019)

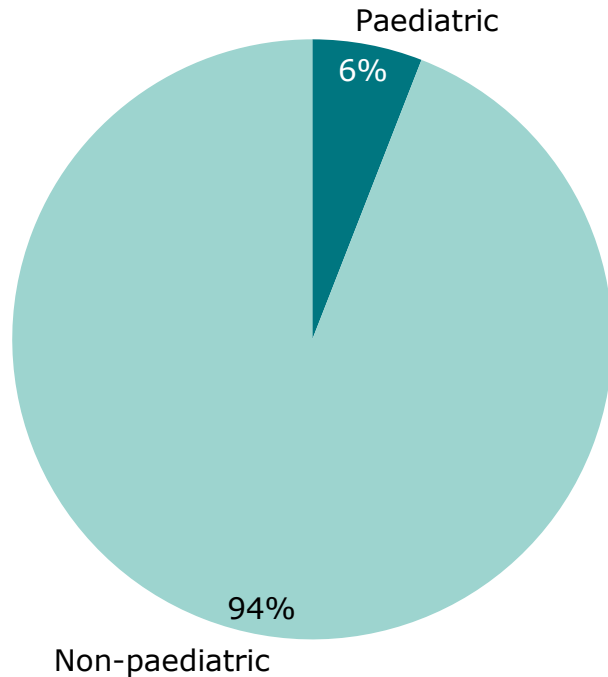


Source: Monitor Deloitte analyses based on FAMHP data

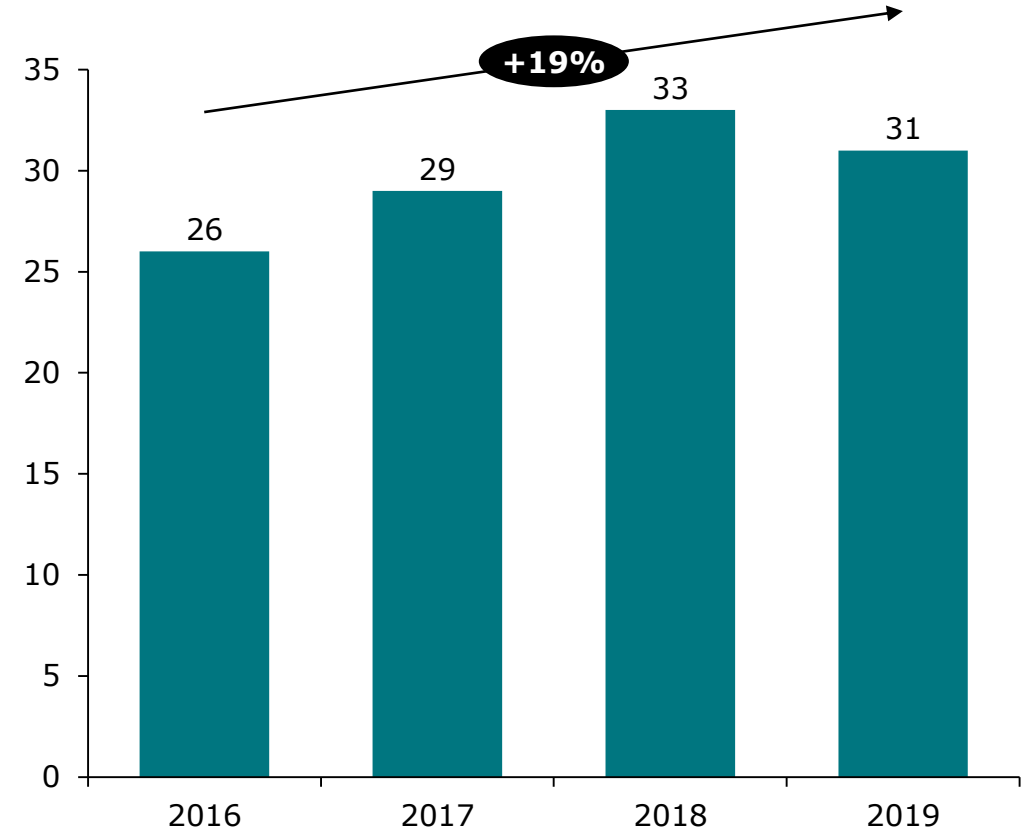
Clinical trials in Belgium

An upwards trend in pediatric trials over the past 4 years

Percentage of CTAs with a paediatric investigation plan authorised by the FAMHP in Belgium (2019)



Evolution of number of CTAs with a paediatric investigation plan in Belgium (2016-2019)

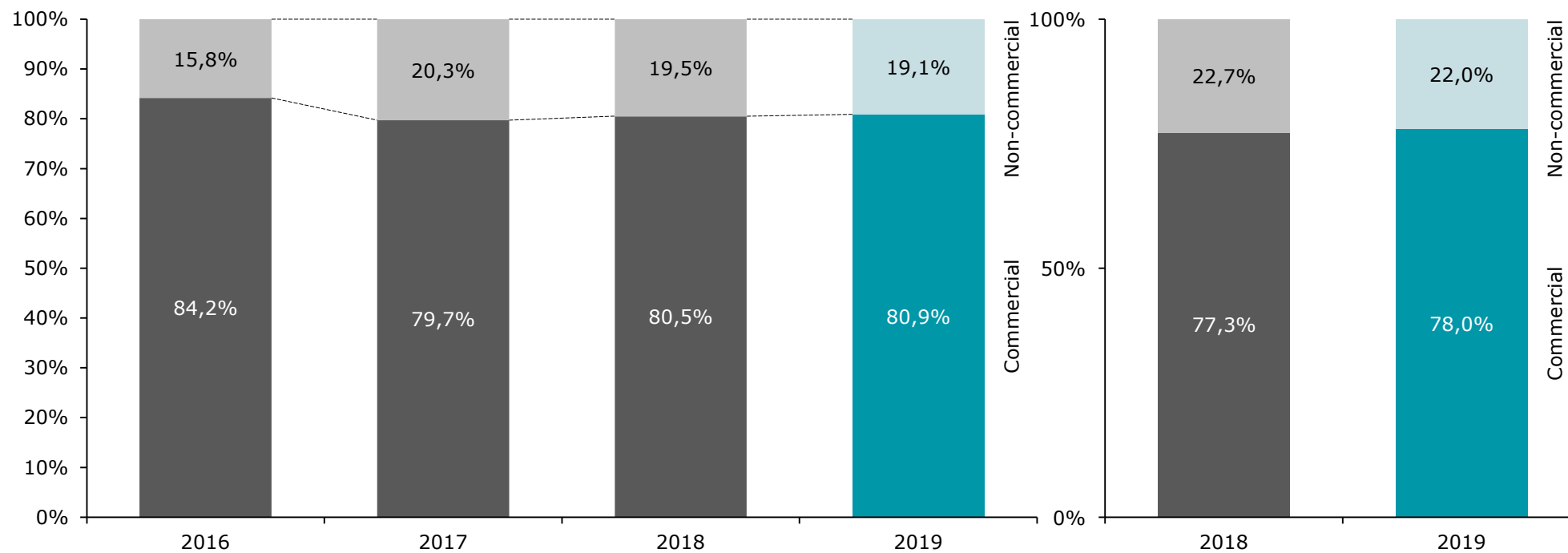


Source: Monitor Deloitte analyses based on FAMHP data

Clinical trials in Belgium

Commercial trials have a higher footprint in Belgium compared to the European cohort

Percentage of CTAs per status of the sponsor in Belgium (2016-2019) compared to European cohort (2018-2019)

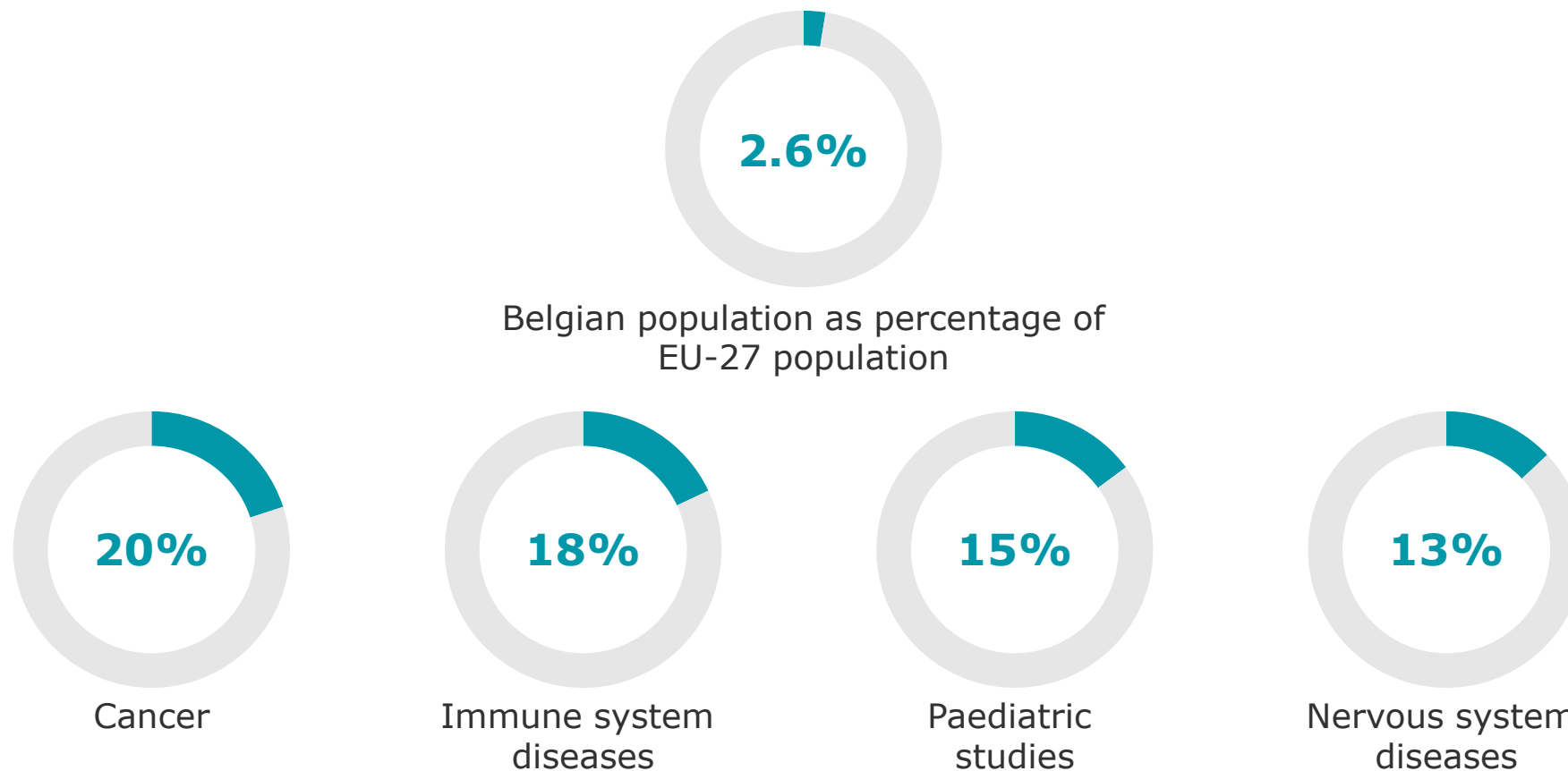


Source: Monitor Deloitte analyses based on FAMHP data

Clinical trials in Belgium

A strong clinical trials footprint of Belgium at European level with a relatively high percentage of clinical trials in Europe conducted in Belgium

Proportion of European clinical trials conducted in Belgium for selected type of studies compared to the proportion of the Belgian population in Europe, 2019



Source: Monitor Deloitte analyses based on FAMHP data 2018

Clinical trials in Belgium

CTAs per type of medicinal product involved are comparable between Belgium and the European cohort

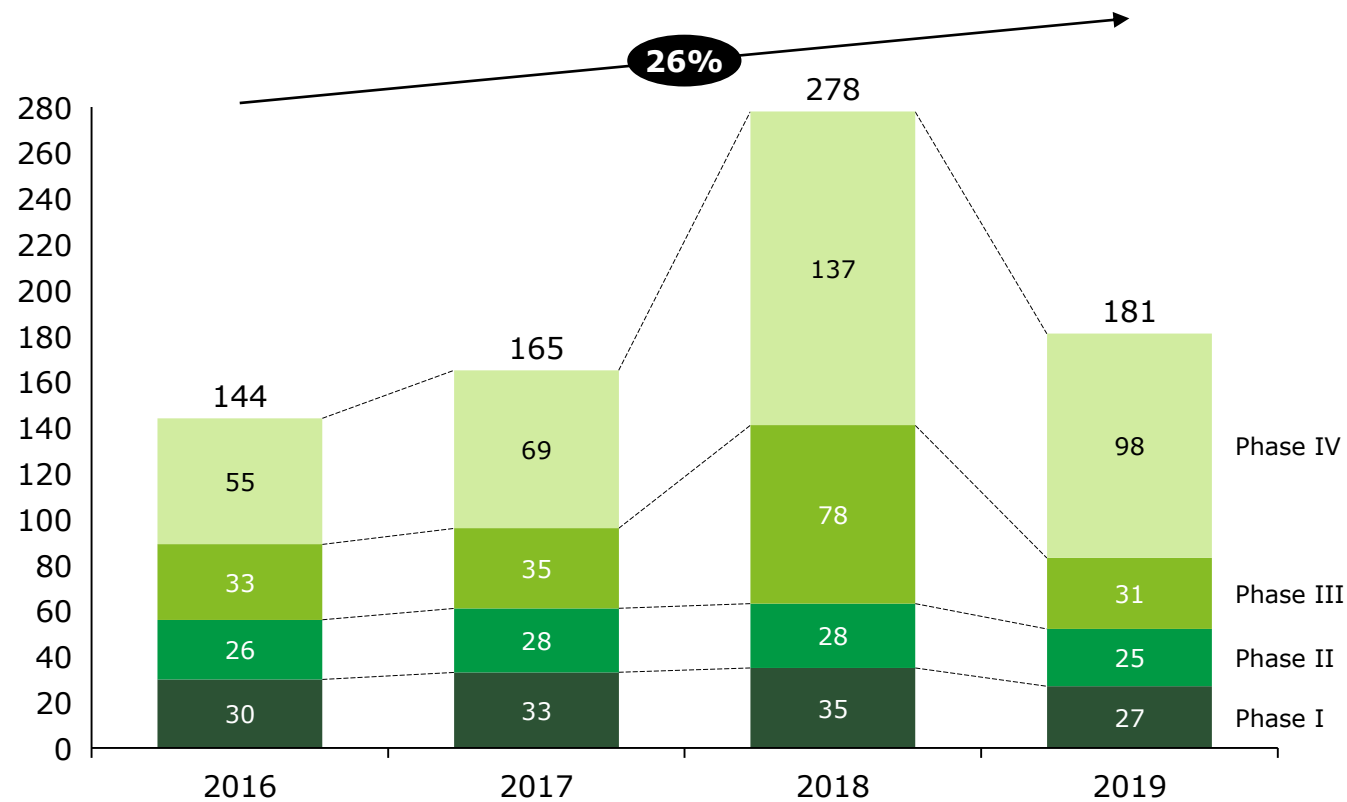
Type of IMP	BE	European cohort
Chemical origin	67,5%	68,3%
Biological origin	42,1%	41,1%
ATIMP	3,4%	3,6%
Combination Product Including Device	5,2%	4,3%
Radiopharmaceutical MP	1,7%	1,6%
Immunological MP	6,7%	7,4%
Plasma Derived MP	1,0%	1,4%
Extractive MP	0,8%	1,3%
Recombinant MP	30,6%	29,5%
GMO MP	2,7%	2,7%
Herbal MP	0,2%	0,4%
Homeopathic MP	0,4%	0,0%
Another type MP	5,2%	6,1%

Source: Monitor Deloitte analyses based on FAMHP data 2018

Patient involvement in clinical trials in Belgium

An increase in planned number of patients is a trend to monitor in the future

Average planned number of subjects to be included in CTAs by phase in Belgium (2016–2019)

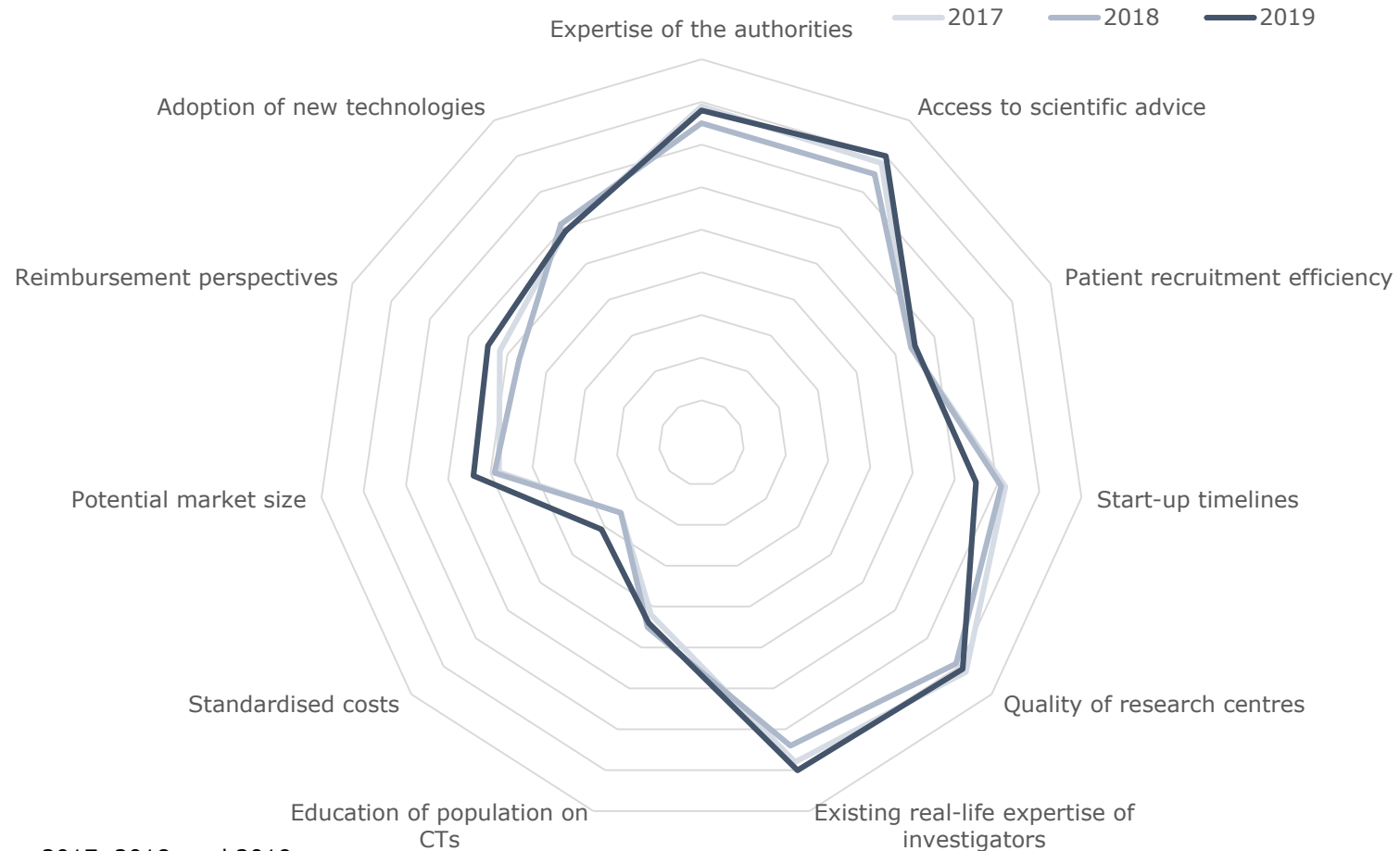


Source: Monitor Deloitte analyses based on FAMHP-data

Attractiveness of Belgium

Strong regulatory and scientific expertise remain key drivers for the attractiveness of Belgium as a clinical trial location

Average rate of Belgium on the following drivers for clinical trial location selection



Source: pharma.be member survey 2017, 2018, and 2019



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