

## **The French healthcare system faced with contradictory injunctions: let's not squander our potential!**

***2025 Barometer of France's attractiveness to the pharmaceutical industry, carried out by PwC for LEEM***

On the occasion of the presentation of the 360° Barometer, carried out by PwC, Leem drew a paradoxical and worrying conclusion: France has solid industrial and human assets, but is making one choice after another to the detriment of French health. Even though our country has almost 110,000 employees in the pharmaceutical industry and a solid research and innovation base, pharmaceutical companies are planning to limit their investments in the face of mounting inconsistencies.

We are today warning against a worrying weakening of a sector that is strategic for the nation and creates value: for every euro invested, the pharmaceutical industry generates €2.1 for the French economy (not counting the positive effects of a healthy population).

***"Pharmaceutical companies, from our micro-businesses to the major groups, create scientific and economic value, jobs and, above all, health for all French people. Yet our sector continues to be penalised. In a geopolitical context that is redefining the nation's priorities, we must all work together to correct this inconsistency and give French patients access to their treatments"*** - Laurence Peyraut, CEO of Leem.

### **The 360° Barometer: an X-ray of a French paradox**

The 360° Barometer of the pharmaceutical industry assesses the key drivers of attractiveness for the pharmaceutical industry: access to treatments, innovation, production, taxation and investment climate. It combines economic and public health data with the perceptions of the heads of pharmaceutical companies operating in France.

**5 years after the Covid pandemic, the situation is startling. France is taking care of people's health, but is falling behind other countries despite its undeniable assets:**

- France is still Europe's **2nd largest** pharmaceutical market... but it is becoming one of the least attractive for pharmaceutical companies.
- **Only 60% of medicines** with European marketing authorisation are available in France.
- It takes 523 days for a new treatment to become available... compared with **50 days in Germany**.
- 7% increase in marketing discontinuations, mainly due to economic imbalance, after a post-COVID decline,
- Only **9% of new drugs** sold in Europe are manufactured in France, even though our country could produce far more.
- **60%** of operating income is taken by the State, 88% of which is taxed specifically for the sector.
- **64%** of leaders no longer plan to invest in France in the next three years.

## **Pharmaceutical companies put forward proposals to boost the attractiveness of the sector**

Despite our efforts to contribute to controlling public finances (measures for proper use, delisting, etc.), **our efficiency proposals have so far gone unheeded**. We are now calling for the levers of attractiveness to be activated as a matter of urgency, focusing on 3 areas of work to reignite a virtuous circle for the healthcare system and patients in France:

### **1. Broadening, simplifying and harmonising access to new treatments**

- > Promote the convergence of healthcare product evaluation systems in the countries of the European Union through the effective implementation of the new HTA (Health Technology Assessment) procedure.
- > Drastically speed up the procedure for access to vaccines.
- > Initiate changes to the system for assessing and setting drug prices in order to adopt a more global approach to therapeutic benefit (taking account of medical need, relief for the healthcare system, medico-economic impact, etc.)
- > Move from a punitive system for preventing shortages to a system of cooperation and transparency throughout the supply chain.

### **2. Make France a home for innovation again**

- > For the most innovative trials, introduce a European fast track system to reduce the time taken to authorise clinical trials from the current 100 days to 31 days.
- > Encourage the conduct of clinical trials in France by facilitating price negotiations to counter any flight to other countries.
- > Expand the framework for collaboration with ANSM (National Association for the Safety of Medicines and Health Products) on repositioning the value in use of low-cost compounds for the treatment of serious diseases.
- > Guarantee the quality, structuring and interoperability of health data through feasibility studies to attract projects.

### **3. Supporting a strategic sector for sovereignty**

- > Strengthen European and French industrial sovereignty through a harmonised pricing and public purchasing policy.
- > Introduce a viability measure to support the sovereignty of low-margin medicines produced in France and/or Europe through pricing.
- > Create tax incentives to improve the operating conditions of industrial sites.
- > Take account of investment in transition, particularly environmental transition, in pricing.

Committed to supporting the healthcare system, our companies need an overhaul of an unreadable and punitive tax system, and for medicines to be considered as an investment rather than just a cost.

Sovereignty, health, competitiveness: the common project exists, we call for a health programming law, supported by stable interministerial steering, to make it a reality.

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