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Canada

Biosimilars in Canada: Policies to Promote Switching and What It Means for Payers

**Presentation to the 2025 Annual CAHSPR Conference
May 2025**

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Disclosure: I have no actual or potential conflict of interest in relation to this topic or presentation.

Background and Objectives

- Potential savings from biosimilars are a topic of international interest with relevance for Canada
- Given Canada's high-use, high-cost biologics market, increased biosimilar adoption offers a significant opportunity for cost savings for Canadian payers
- This presentation compares the evolving Canadian market for biosimilars with international counterparts
- The analysis focuses on biosimilar market dynamics in Canada, assessing the impact of biosimilar switching to date and the potential for further cost savings

Data Sources and Limitations

- This study is part of the PMPRB's broader reporting in the *Biologics in Canada* chartbook series
- Data sources:
 - IQVIA's MIDAS® Database (2014–2023); US Food and Drug Administration (FDA), European Medicines Agency (EMA), and Health Canada (HC) databases:
 - for international comparisons of biosimilar availability, uptake, and sales
 - IQVIA's Canadian Drugstore and Hospital Purchases Audit (CDH, 2019–2023):
 - for Canadian biosimilar uptake and savings potential
- Limitations:
 - Biologic medicines were selected based on Health Canada's Drug Product Database (DPD) Schedule D and Prescription lists and include insulin biologics
 - The cost savings model does not explore the impact of policy changes on biosimilar price levels; prices of biosimilars in the study period were used to calculate cost implications and savings

Overview



Biologics market trends in Canada and international comparisons



Biosimilar availability and uptake in Canada and other OECD countries



Biosimilar uptake challenges and current policies in Canada

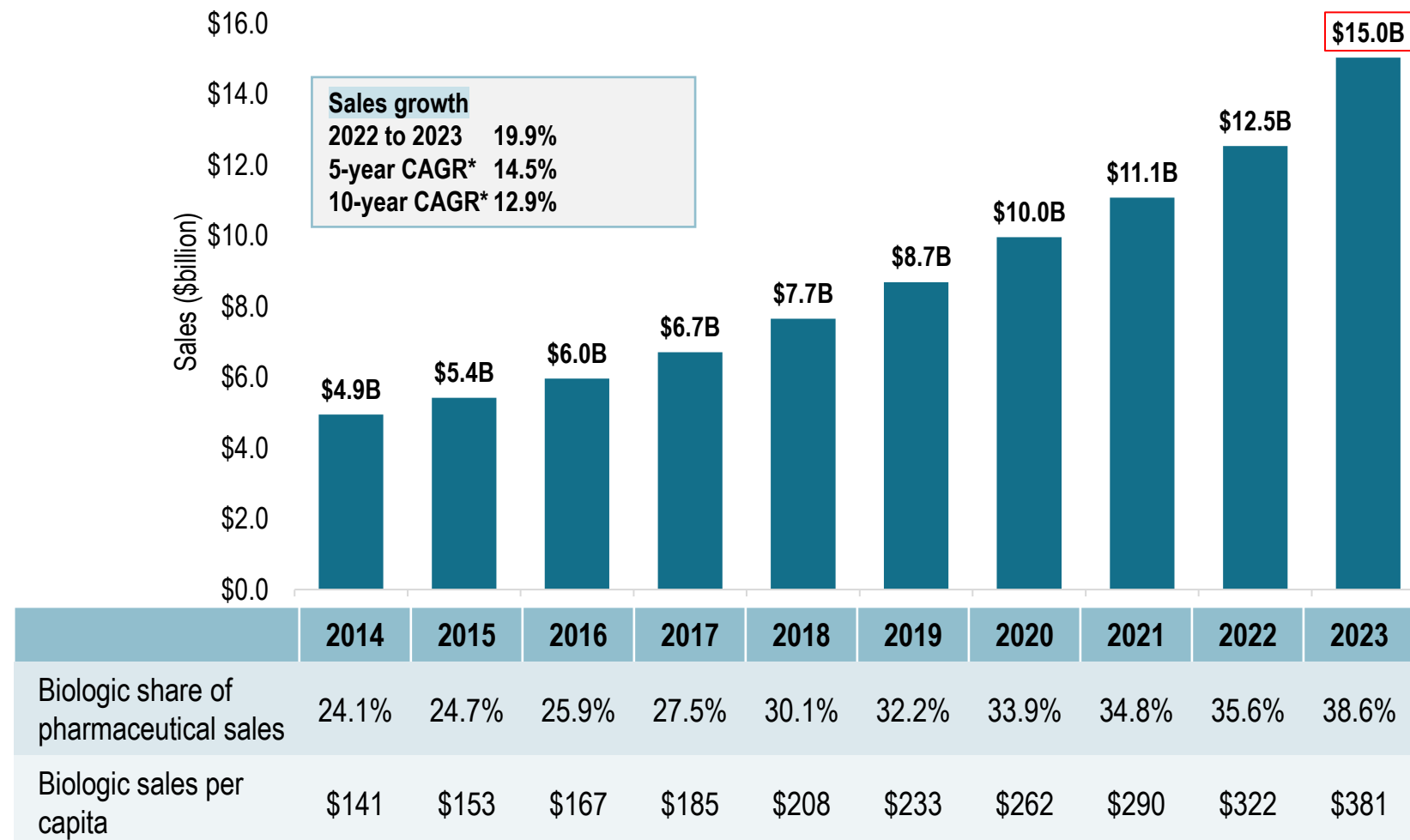


Cost-saving opportunities from biosimilars

Biologic medicine sales tripled over the last decade

- Sales of biologic medicines in Canada tripled from \$4.9B in 2014 to \$15.0B in 2023
- This represents a 10-year compound annual growth rate of 12.9%
- In 2023 alone, biologics sales increased by 19.9%

Sales of biologic medicines in Canada, 2014 to 2023

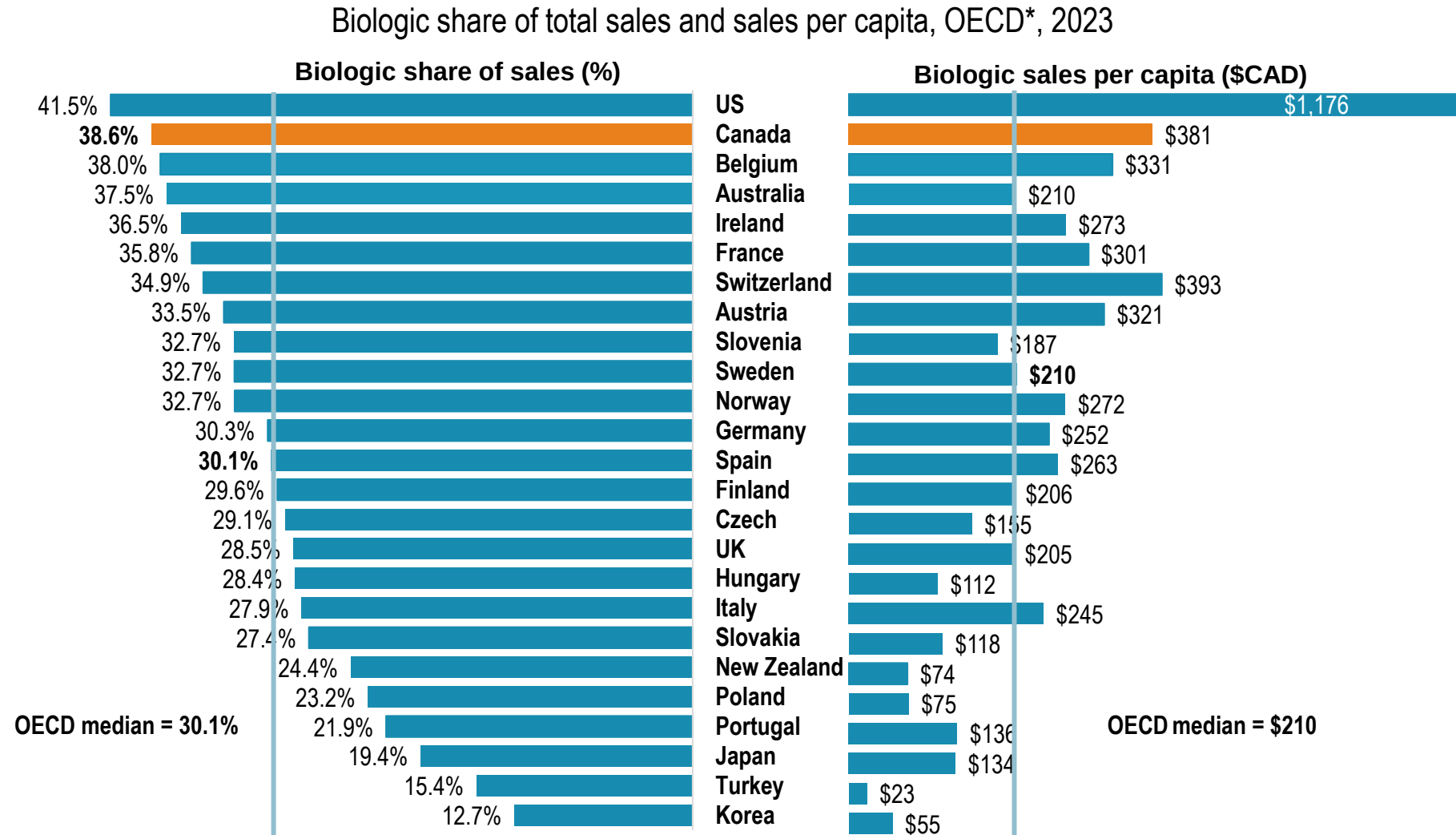


Note: Includes all prescription biologics as per Health Canada's Drug Product Database (DPD) Schedule D and Prescription lists, as well as insulin biologics.
Data source: IQVIA MIDAS® Database. All rights reserved.



Canada placed among the top-ranked countries in the OECD for biologics spending

- Biologics accounted for 38.6% of total pharmaceutical sales in Canada in 2023, a higher share than the OECD median of 30.1%
- Per capita spending on biologics was \$381, 80% more than the OECD median of \$210, placing Canada second to the U.S.



Note: Includes all prescription biologics as per Health Canada's Drug Product Database (DPD) Schedule D and Prescription lists, as well as insulin biologics.
Data source: IQVIA MIDAS® Database. All rights reserved.

* Six OECD countries with incomplete biologic sales data in 2023 were excluded from the figure.



Biosimilar availability and sales in Canada close to EU and exceed U.S.

- As of 2023, biosimilars were approved for 18 biologic medicines in Canada, compared to 22 in the EU and 15 in the U.S.
- Biosimilars accounted for 12% of total biologic sales in Canada, close to 14% in the EU and ahead of 3% in the U.S.
- Availability and market share of biosimilars in Canada have kept pace with Europe, despite fewer approvals

* Multiple biosimilar trade names referencing the same originator biologic are counted as one biosimilar medicine.

Data source: US Food and Drug Administration (FDA), European Medicines Agency (EMA), and Health Canada databases;
IQVIA MIDAS® Database, prescription retail and hospital markets, All rights reserved.

Number of medicines* with biosimilars approved in Europe, the US, or Canada, as of 2023

Biologic Medicine	EMA (n=22)	FDA (n=15)	Health Canada (n=18)
Adalimumab	✓	✓	✓
Aflibercept	✓		
Bevacizumab	✓	✓	✓
Eculizumab	✓		
Enoxaparin sodium	✓		✓
Epoetin alfa	✓	✓	
Epoetin zeta	✓		
Etanercept	✓	✓	✓
Filgrastim	✓	✓	✓
Follitropin alfa	✓		
Human insulin			✓
Infliximab	✓	✓	✓
Insulin aspart	✓		✓
Insulin glargine	✓	✓	✓
Insulin lispro	✓		✓
Natalizumab	✓	✓	
Pegfilgrastim	✓	✓	✓
Ranibizumab	✓	✓	✓
Rituximab	✓	✓	✓
Somatropin	✓	✓	✓
Teriparatide	✓		✓
Tocilizumab	✓	✓	✓
Trastuzumab	✓	✓	✓
Ustekinumab		✓	✓
% Biosimilar sales of overall biologics, 2023	14.2%	3.2%	11.8%



Canada's biosimilar uptake kept pace with the OECD trends

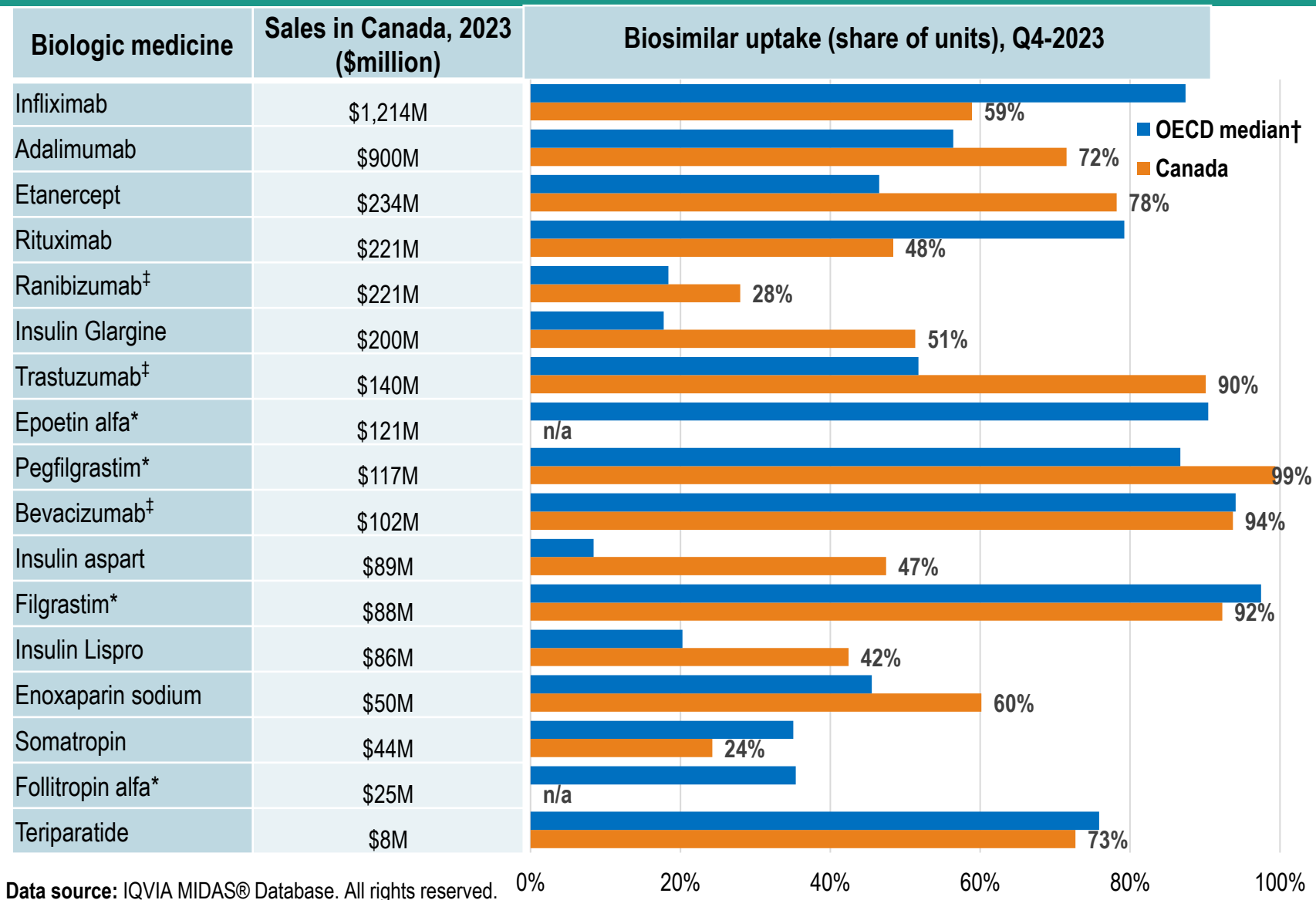
- Canada achieved biosimilar uptake similar to or above that of the OECD median for most high-selling biologics
- Infliximab, the highest-selling biologic, had a 59% biosimilar share in Canada in 2023, below the OECD median of 87%
- Adalimumab, another high-selling biologic medicine, had a 72% biosimilar uptake in Canada in 2023, higher than the OECD median of 56%.

*Generally used on a short-term basis.

‡ Mainly indicated in oncology or ophthalmology.

Administered in hospitals or clinic setting in Canada.

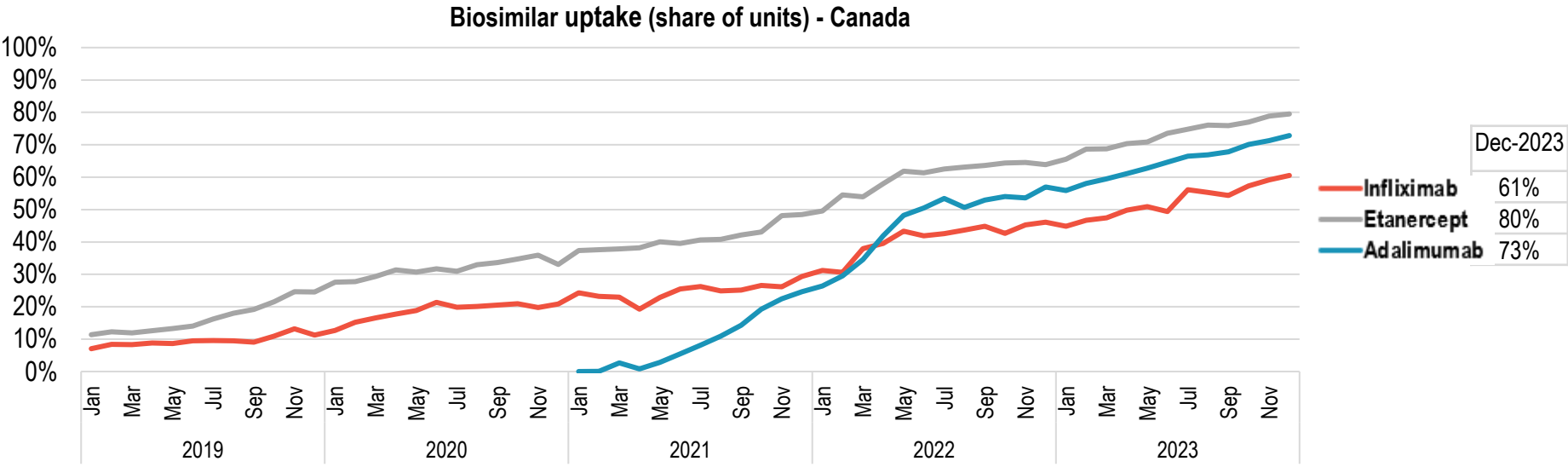
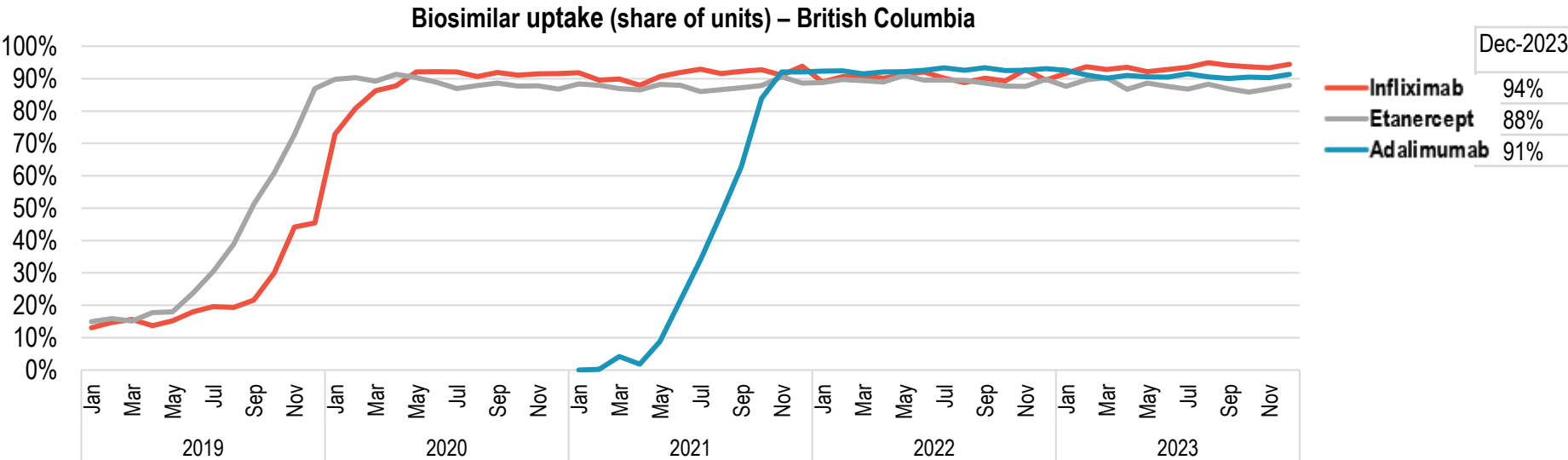
† Canada is excluded from the median.





Uptake of biosimilars in Canada has increased following switching initiatives, led by BC

- Since May 2019, Canadian payers have launched switching initiatives to increase uptake, led by British Columbia (BC)
- Biosimilars for three widely used anti-TNF- α drugs (adalimumab, infliximab, and etanercept) reached ~90% market share in BC between mid-2020 and late 2021
- National uptake for these medicines gradually rose to 60–80% of units sold by December 2023



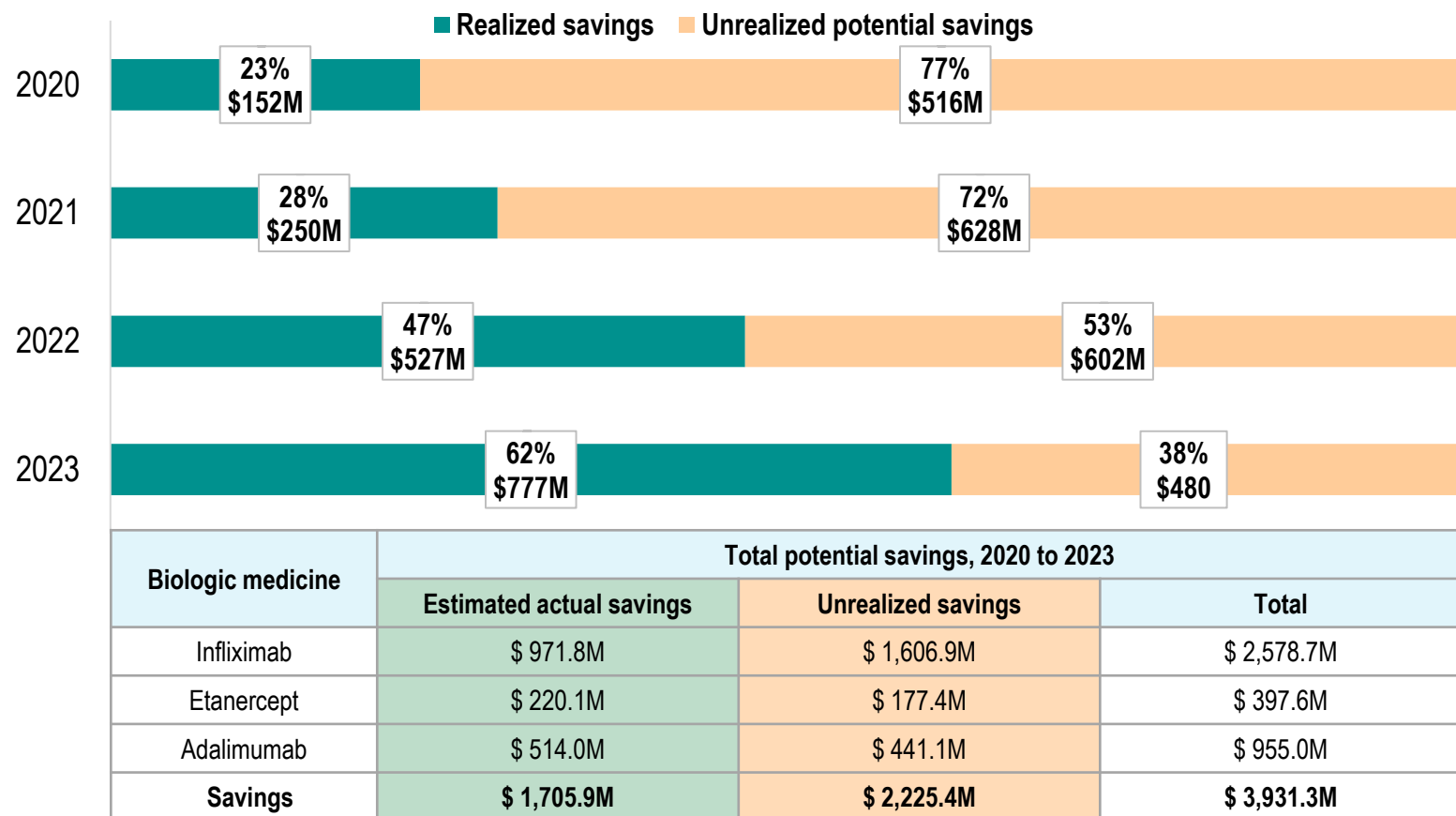
Data source: Canadian Drugstore and Hospital Purchases Audit (CDH) databases, IQVIA. All rights reserved



Growing biosimilar savings in Canada, with more to gain

- Biosimilar use for three high-selling biologics — infliximab, adalimumab, and etanercept, generated \$1.7B in savings between 2020 and 2023
- If uptake across Canada had matched the higher uptake levels in British Columbia, an additional \$2.2B in savings could have been realized
- Biosimilar uptake has increased over time, with the realized share of potential savings growing from 23% in 2020 to 62% in 2023

Realized and potential savings from biosimilar use in Canada, 2020 to 2023



Data source: Canadian Drugstore and Hospital Purchases Audit (CDH) databases, IQVIA. All rights reserved.

Conclusions

- Biologics are a high-growth market in Canada, with sales tripling over the last decade
- Biosimilar availability and market share in Canada have kept pace with Europe
- Biosimilars uptake for high-selling products aligns with the OECD trends
- Biosimilar switching is led by provinces and payers, resulting in varied uptake across jurisdictions
- With nearly 40% in savings still unrealized, broader adoption of switching initiatives could further reduce drug spending



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