

 MORNING CONSULT

Canadian Generic Pharmaceutical Association

CANADA NAFTA 2.0
POLLING PRESENTATION

September 24, 2018

Key Points

- 1 Accessible and affordable medications are top issues for Canadians, and this is reflected in their desire for trade reform: overwhelmingly, Canadians say NAFTA 2.0 should include provisions that make it easier for patients to access less expensive prescriptions.
- 2 Strong majorities support NAFTA 2.0 provisions that lower the cost of prescription medicines while balancing innovation and competition within the pharmaceutical industry. This includes imposing penalties on brand name companies that manipulate intellectual property (IP) protections.
- 3 Two in 3 (67%) say NAFTA should include provisions that make biosimilars more accessible to patients.
- 4 In the minds of Canadians, CETA concessions only serve to stress the importance of NAFTA 2.0 ensuring access to affordable medicines.
- 5 In light of drug exclusivity rules, 2 in 3 consider it 'very important' NAFTA 2.0 prioritizes access to affordable drug coverage over the profits of U.S. drug companies, in addition to ensuring Canada can afford to implement a National Pharmacare plan for its citizens (61%).

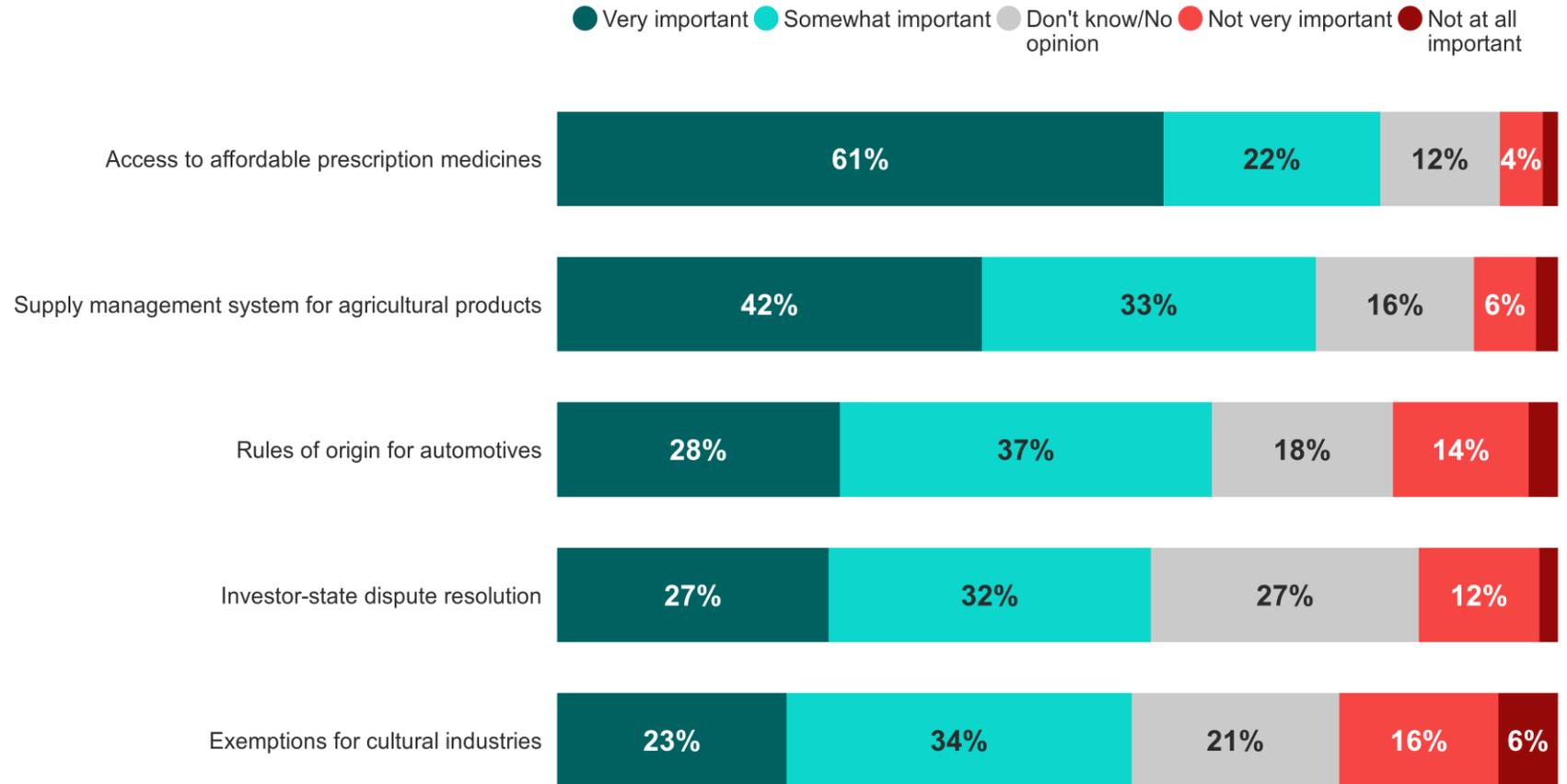
Methodology

This poll was conducted from September 14-16, 2018, among a national sample of 2203 Adults. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, race/ethnicity, gender, educational attainment, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

Provisions to include in NAFTA 2.0

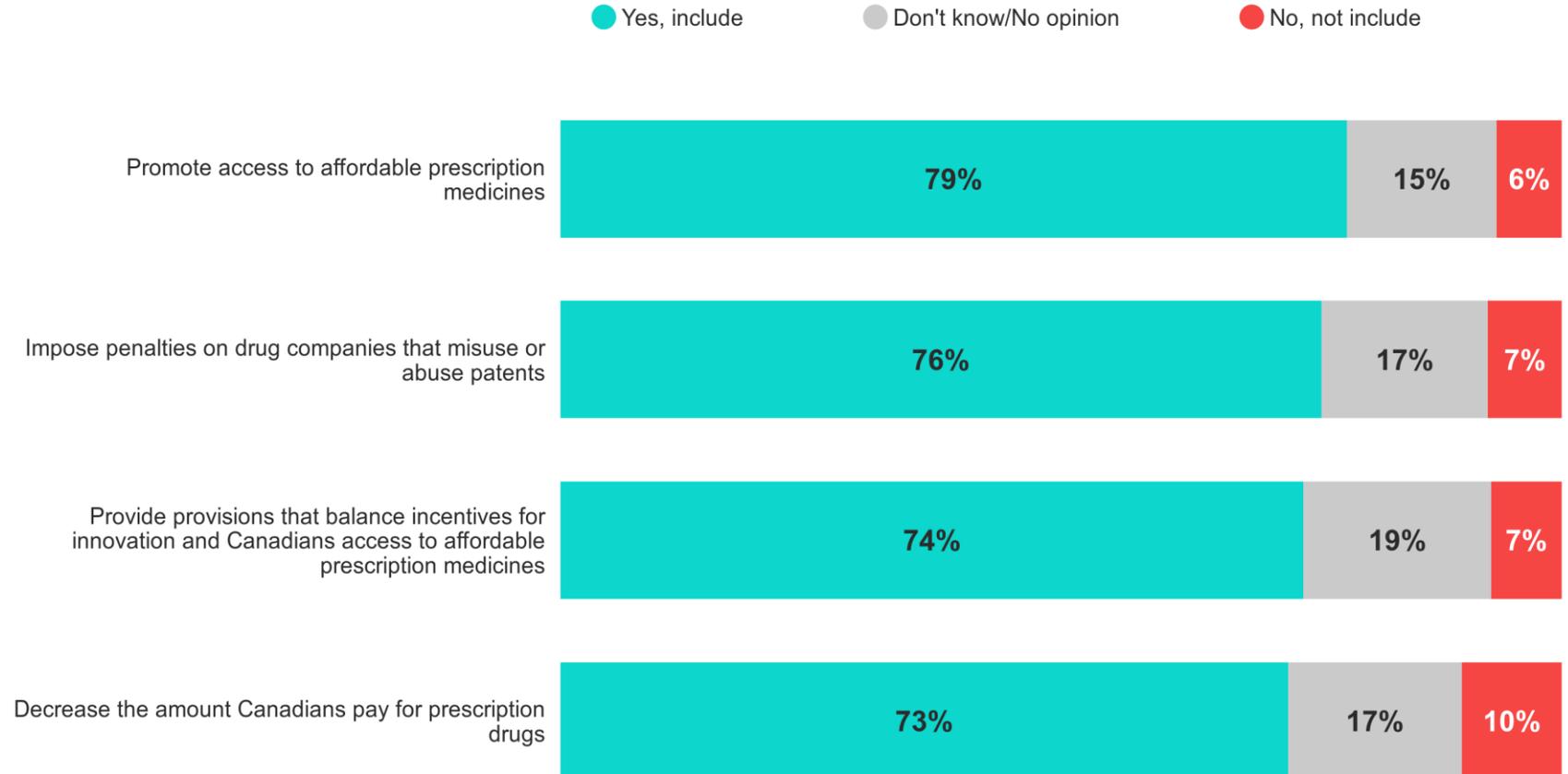
Access to affordable medicines is the most important aspect of NAFTA 2.0.

As you may know, the North American Free Trade Agreement (NAFTA) is a free trade agreement between Canada, the United States and Mexico that is currently being renegotiated. The negotiated agreement will be referred to as NAFTA 2.0 in this survey. Based on what you know, how important are each of the following aspects NAFTA 2.0?



Overwhelmingly, Canadians support NAFTA 2.0 provisions that lower the cost of prescription medicines while balancing innovation and competition within the pharmaceutical industry. This includes imposing penalties on brand name companies that manipulate intellectual property (IP) protections.

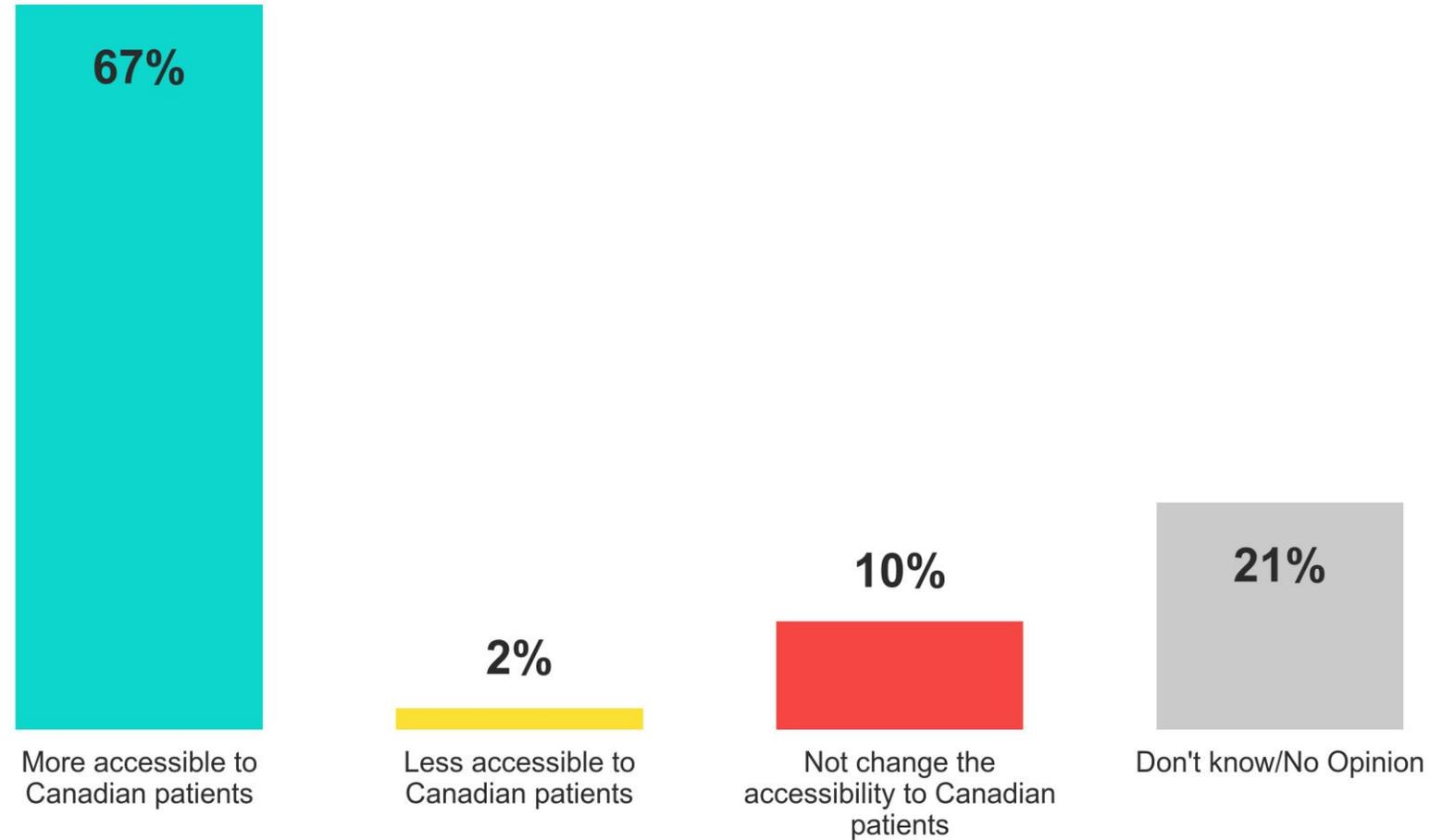
Do you think NAFTA 2.0 should include provisions that:



Provisions to include in NAFTA 2.0

Two in 3 (67%) say NAFTA should include provisions that make biosimilars more accessible to patients.

Thinking about biosimilars, do you think NAFTA 2.0 should include provisions that make access to biosimilars:

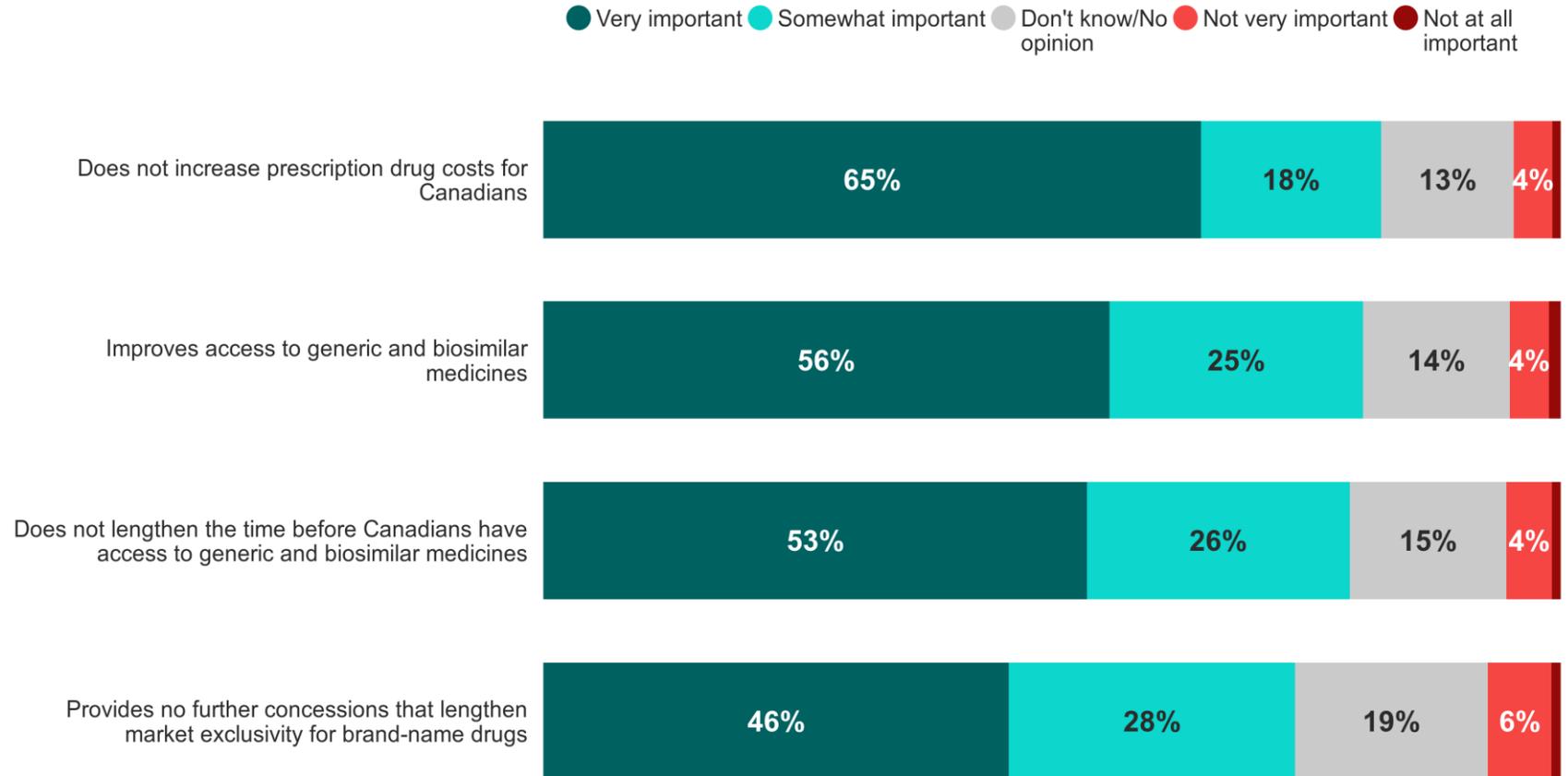


Provisions to include in NAFTA 2.0

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In the minds of Canadians, CETA concessions only serve to stress the importance of NAFTA 2.0 ensuring access to affordable medicines.

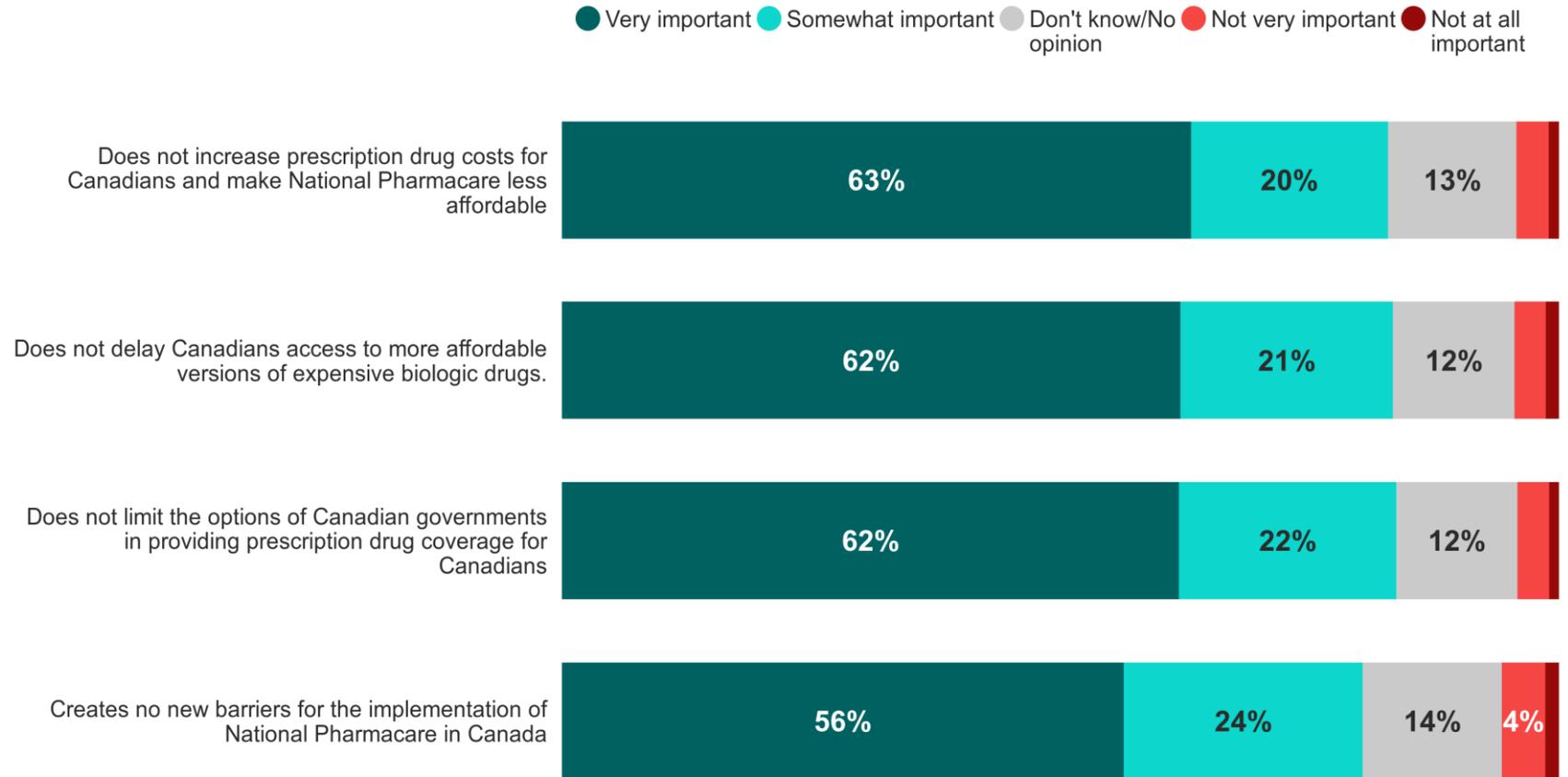
As you may know, Canada recently made concessions in a trade agreement with the European Union called CETA that will delay access to generic and biosimilar medicines in Canada by two years. The federal Parliamentary Budget Officer has estimated that these concessions will cost Canadians more than \$500 million each year. Knowing this, how important is it that NAFTA 2.0:



Provisions to include in NAFTA 2.0

Two in 3 (62%) say it is very important NAFTA 2.0 does not increase prescription drug costs, does not delay access to affordable medicines, and does not limit the options of prescription drug coverage.

As you may know, the affordability of medications is an issue for many Canadians. Some Canadians have to choose between buying groceries or the medications they need. The Advisory Council on the Implementation of National Pharmacare was created by the Government of Canada in the Spring of 2018 to lead a national dialogue on how to implement affordable national pharmaceutical care for Canadians and their families, employers and governments. Based on what you know, how important is it that NAFTA 2.0:



Provisions to include in NAFTA 2.0

In light of exclusivity, 2 in 3 say it is 'very important' NAFTA 2.0 prioritizes access to affordable drug coverage over the profits of U.S. drug companies, in addition to ensuring Canada can afford to implement a National Pharmacare plan for its citizens (61%).

As you may know, exclusivity is a period of time when a brand-name drug has legal protection from generic drug competition. Exclusivity is designed to reward innovation in the pharmaceutical industry. Most of the world's brand name drug companies are headquartered in the United States. The United States is pushing for longer periods of market exclusivity for companies in trade negotiations with Canada and other countries. Based on what you know, how important is it that NAFTA 2.0:

