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The complexity of the Belgian market is difficult to change. Progress is being made, but slower than we would like to see

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Miranda Heining, general manager of Fresenius Kabi for Belgium and the Netherlands, speaks about the career path that led her to join the pharma industry and lead the affiliate, her experience managing two countries simultaneously, and the potential pitfalls in navigating Belgium's market access landscape.

You have a rather unique career path compared to other general managers in the industry that studied chemistry or medicine. How did you find yourself in pharma?

I started my career doing marketing research for various industries including pharma. Through the research, I got to learn more about pharma and gradually became more interested in the industry. After a while, I was asked by a pharma company to join the organization internally for a marketing position which I accepted. I first started in quantitative market research and eventually moved into product management which gradually evolved into taking on further positions, e.g. as Marketing Manager, Sales Director as well.

What was it like for you to take on the responsibility of leading the affiliate in both the Netherlands and Belgium when you were appointed in 2018?

The first thing I had to consider was that these two markets are totally different. When I started my role, I had already been on the management team for Belgium and the Netherlands, so the onboarding was not so challenging as the team already knew me. However, it is necessary to find a new way of working as the culture of the Belgium office is completely different from the Netherlands – even if we are the same affiliate. Therefore, my aim was to shake up the affiliate and create a much more open culture among the operations focused on young talent, continuous learning, and professional development.

In the Fresenius annual report we read the great note of your CEO Mr Henriksson who says it is a great time for the company globally. Does the same go for the BeNe cluster?

We have many new products, not only in generics but also new introductions in enteral nutrition and devices which have been propelled with R&D. There are always exciting developments happening across the entirety of Fresenius Kabi's portfolio which is just one of the aspects that make it such an interesting company to work for. Furthermore, last year in the Netherlands and this year in Belgium, we also launched our biosimilar offering which is a major milestone for the affiliate.

Even though Fresenius Kabi Belgium & The Netherlands spans two countries there are key particularities between the markets. For example, looking at biosimilars we see that uptake in the Netherlands is very high compared to Belgium where this is not the case at all.

How would you describe the scope and scale of the local affiliate in both the Netherlands and Belgium within a European context?

Still, while the markets may not be as large as the EU 5, if we compare the BeNe cluster to the Nordics for example, we do have quite a nice scope of operations between the two countries.

How is Fresenius Kabi's corporate portfolio represented locally - how are trends shaping your business locally?

All of Fresenius Kabi's product areas play a key role in delivering our comprehensive healthcare solution. In Belgium particularly we are seeing a growing trend in our clinical nutrition business. In this area we are primarily hospital focused but also are present in the retail segment with

pharmacy sales which is a growing space for the affiliate. Retail growth is accelerating because some of our business is moving outside of the hospital as there is an increasing trend of outpatient care. For example, with tube feeding, more and more patients are managing this from home and going through homecare outlets to manage their health.

How do you expect the affiliate's portfolio to evolve going forward?

In the future, we will be focusing more on our biosimilar business as this is a relatively new area we have introduced in the Belgian market. In the Netherlands, biosimilars often go through a tendering process whereas Belgium primarily functions through prescription and still lacks transparency and is quite complex in terms of access. The healthcare system continues to function in a model that needs revision to be better adapted to future challenges. More and more innovations will be introduced in the coming years and in order to have a sustainable healthcare system, there must be a shift to better utilize generic and biosimilar products. Innovative products are very important to the system but so are generics for the role that they play in creating headroom to reinvest in the access of innovation while keeping spending controlled.

Furthermore, as we see in the Netherlands, the lower cost of biosimilars gives access to medicine for a much broader patient population. These are high quality, essential medicines with a greater patient reach and lower budgetary burden than off-patent originators – a winning solution for all stakeholders. However, the complexity of the Belgian market is difficult to change. Progress is being made, but slower than we would like to see.

What do you see as the main areas for improvement in Belgium's healthcare landscape?

The financing structure of the hospital in Belgium is quite complex and partly not transparent. When we consider the price of products, costly innovations are being allocated greater resources which to an extent can be logical, but is also counter-intuitive as more long-term budgetary flexibility can be created by directing more resources to the biosimilars and generics that are on the market.

This being said, there have been reforms made in the Belgian hospital infrastructure over recent years. Like what has been the case for many years in the Netherlands, we are seeing changes such as more purchasing groups and specialized hospitals. However, these changes are happening very slowly and perhaps still more resources should be re-directed back to patients. While there are still

many enhancements that are lacking, such a massive entity is difficult to transform, and all stakeholders are looking for possible solutions that can be best implemented.

What has been your experience with introducing IDACIO, Fresenius Kabi's first biosimilar, to the Belgian market?

The recent launch of IDACIO® is just the beginning of Fresenius Kabi's biosimilar story in Belgium which is very exciting. Of course, bringing our first biosimilar in the market, the start was slow, but we can now feel the moment picking up. One of the first hurdles we faced was to get rheumatologists to know Fresenius Kabi as we had a strong presence in the hospitals and pharmacies rather than the prescription business. However, we leveraged the pre-existing connections we have with the medical community from our clinical nutrition portfolio to introduce Fresenius Kabi in this field.

To be successful in such a product launch, it is first necessary to of course be prepared and fully understand the market challenges and opportunities that will be faced. Next, recruiting and retaining the right talent with a strong network in the country is vital - nothing we have accomplished would be possible without the dedicated Fresenius Kabi team. It is also important to be more than just a supplier of drugs but rather a partner to stakeholders which helps to create the right brand image and recognition. Finally, working together with our peers and Medaxes plays an important role as well; especially in the generic and biosimilar sector where we face many challenges. As a sector we cannot succeed by working alone just through sales teams - cooperation under a mutual platform is key to improving the future market conditions in the long term.

What makes Fresenius Kabi a partner of health to the Belgian stakeholders?

Many of our products are also produced in Europe which is a major advantage in our supply chain considering the recent issues arising from product shortages. Furthermore, with our wide range of product offerings, there is always something new going on in our portfolio. Fresenius Kabi is continuously innovating, and we have a very exciting pipeline that allows us to meet with our clients not only for a single product but rather to offer a comprehensive range of added-value solutions.

What working culture and team dynamic do you try and establish at the affiliate to achieve success?

In order to work in a more open culture, I wanted to shift focus to the strengths of individuals rather than getting hung up on what they cannot do. As part of Fresenius Kabi's "caring for life" philosophy, internally we are focusing on the wellness of our team by implementing initiatives around the office such as healthy food, drink enough water, yoga sessions and group walks. Patients are our top priority, but I also believe it is important to look after the team as our ability to make an impact starts from the inside out.

If we look forward to the upcoming five years or so, what objectives are your top priorities for Fresenius Kabi in Belgium?

My top mission is to further develop our biosimilar business and have a full portfolio as this will be a key focus area for the future with Fresenius Kabi introducing many new products in the coming years. The same goes for enteral nutrition where we will have a much larger footprint in the market. As a market leader, our only option is to continue a strong growth trajectory which we will accomplish by leveraging new products across all of our portfolio segments.

In another vein, we will also develop our software solution offering for hospitals. Digitalization is a major trend in healthcare where Fresenius Kabi can also play a major role, therefore, increasing our IT capabilities will be a vital step forward. This will go hand in hand with our device offering as I expect to see a paradigm shift where devices will follow software solutions rather than the other way around as it currently is.

What motivates you to continue down the pharma path you have set on with Fresenius Kabi Belgium & The Netherlands?

As a people's manager, I am passionate about leading my team and helping them find their unique strengths and develop their skills. Moreover, empowering people to take initiative and learn from mistakes to better themselves and continuously grow. One of the key success factors of the company is the dedication of our employees and the excitement that comes with working at Fresenius Kabi.

Everything we do is for our patients, so everything we do is to find new and better ways to impact their lives. Fresenius Kabi is not a traditional company with only a handful of products. There is a

synergy between the actions of our team and the full health solutions we deliver to patients for the benefit of their health.

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