



Delivering the new science to patients

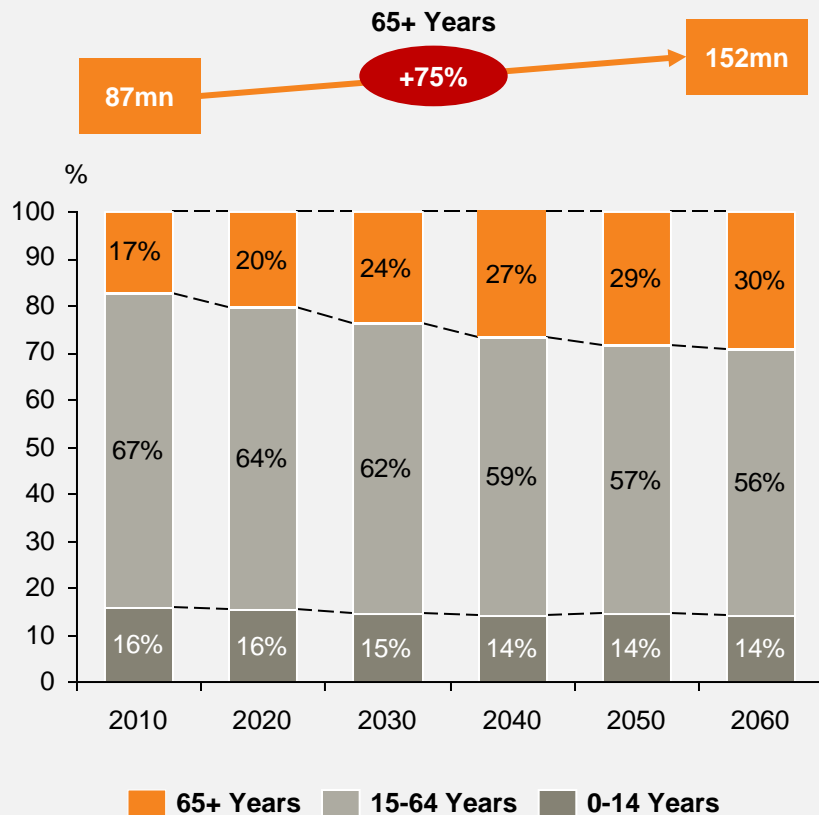
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Industries and Associations

www.efpia.eu

Looking to the future needs

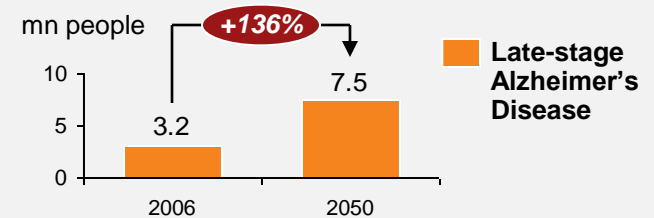
Demographic Development*



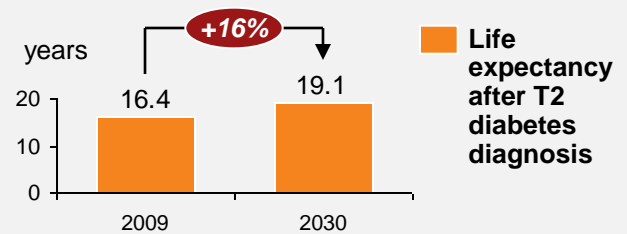
System Impact: Severity, length and increased incidence



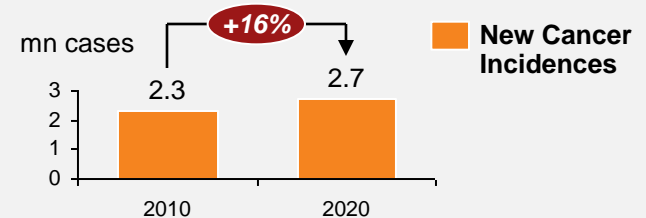
Increase in severity of Degenerative Diseases[†]



Extended impact of Chronic Diseases^Δ



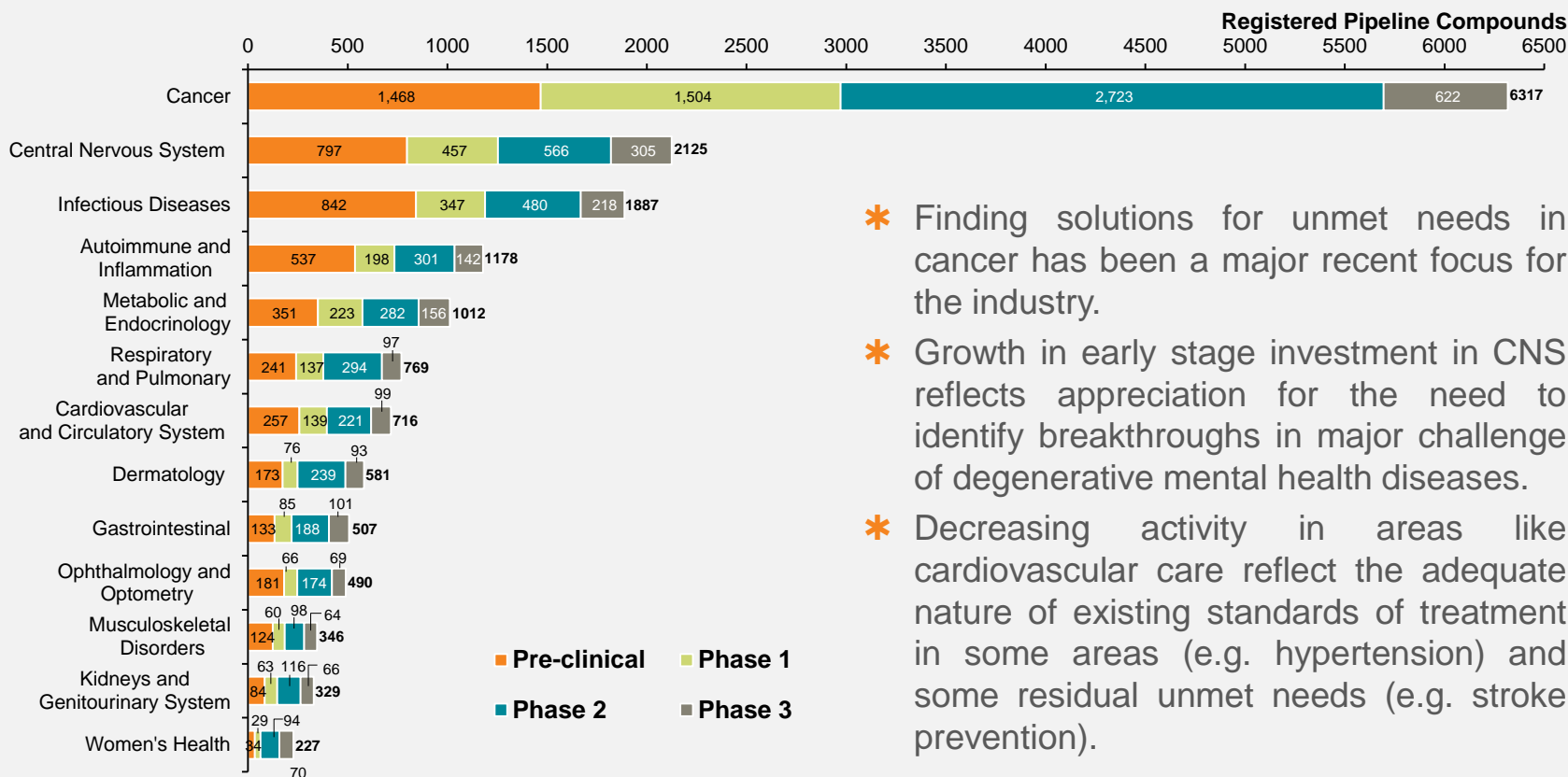
Increased incidence of Cancer[#]



Pipelines are full



Registered Pipeline Compounds end of year 2011

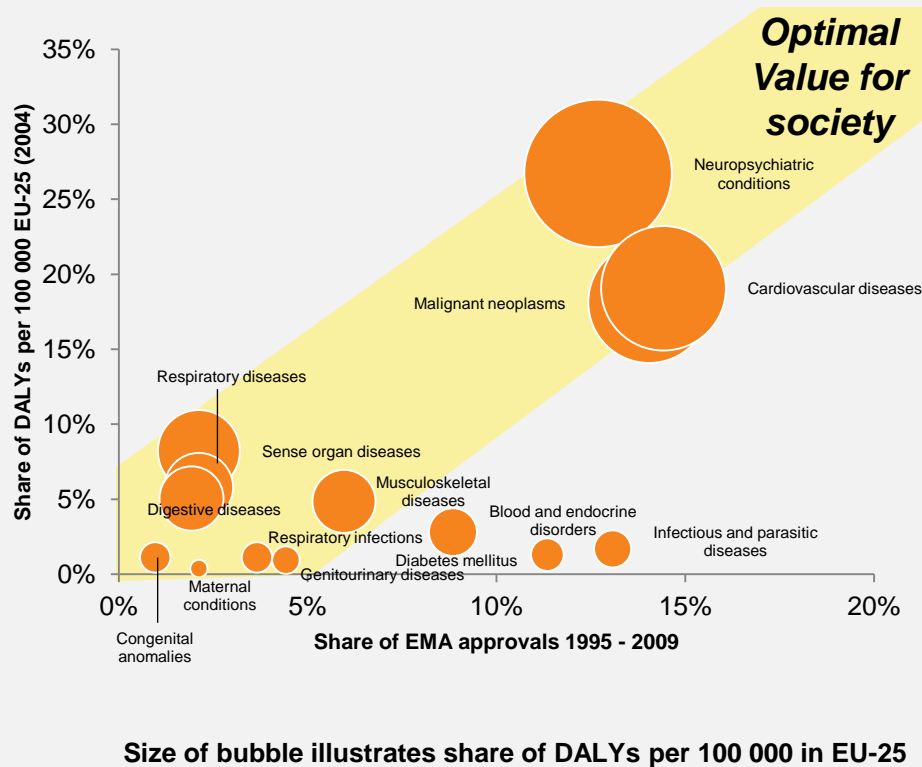


- * Finding solutions for unmet needs in cancer has been a major recent focus for the industry.
- * Growth in early stage investment in CNS reflects appreciation for the need to identify breakthroughs in major challenge of degenerative mental health diseases.
- * Decreasing activity in areas like cardiovascular care reflect the adequate nature of existing standards of treatment in some areas (e.g. hypertension) and some residual unmet needs (e.g. stroke prevention).

and (largely) aligned with needs



Share of EMA approvals 1995 – 2009 and share of DALYs per 100,000 in EU-25

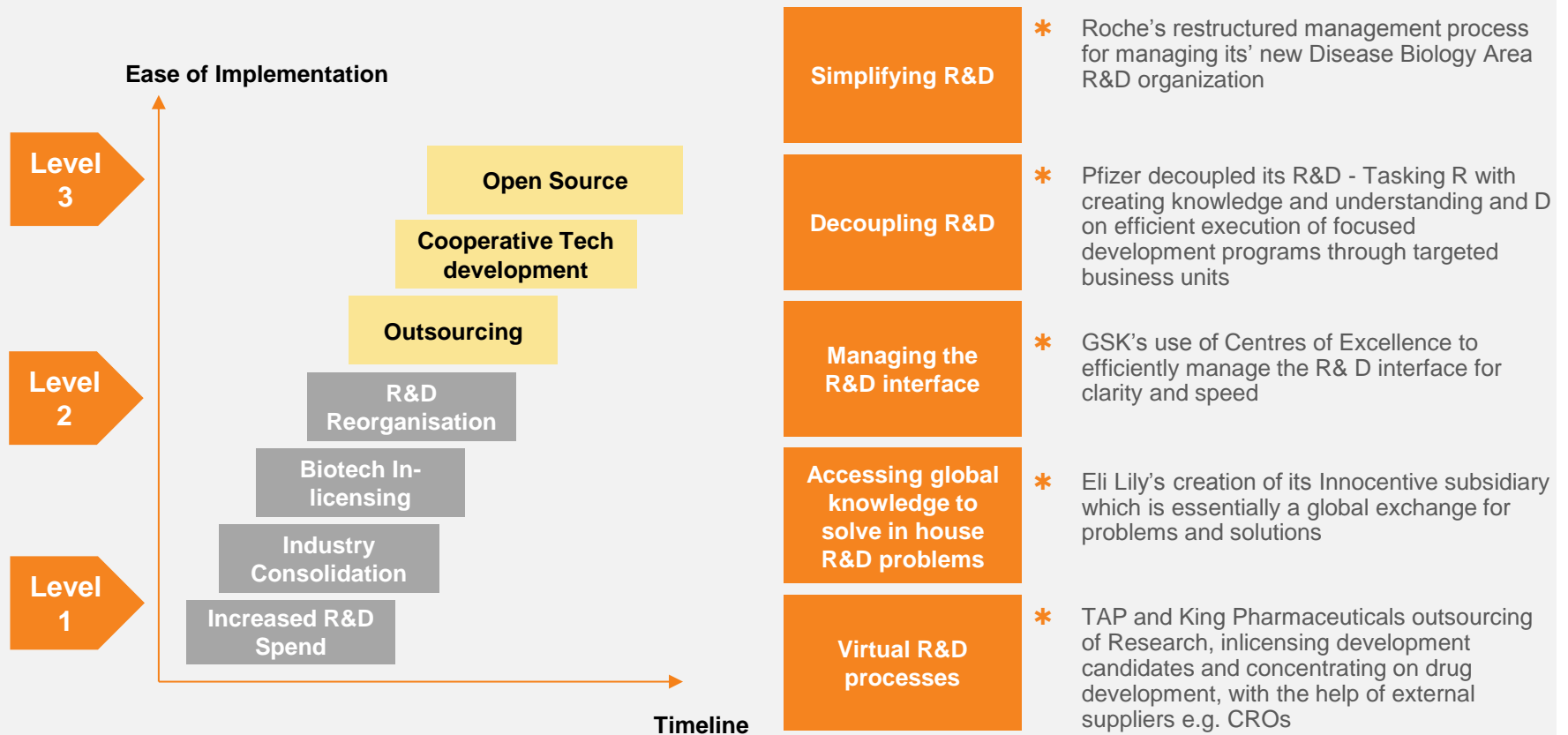


- * The pharmaceutical industry have to a large extent focused their innovation on the unmet needs of EU-25 countries.
- * A minor ‘innovation gap’ can be identified within neuropsychiatric conditions where the share of DALYs lost still exceed the share of new product approvals.
- * Especially for infectious and parasitic diseases and diabetes mellitus, the identified ‘innovation overload’ could be explained by the fact that these diseases largely occur in developing countries where the DALYs (and thus the need for innovation) is substantially greater than in EU-25.

R&D approaches are evolving



Multiple approaches to revitalising research and development





- * The European Commission's Seventh Framework Programme contributes €1 billion to the IMI research programme for participation of public partners in collaborative projects
- * That amount will be matched by mainly in kind contributions (consisting mostly of research activities) worth at least another €1 billion euro from member companies of the European Federation of Pharmaceutical Industries and Associations (EFPIA).

Public funding goes exclusively to public partners: (including small businesses) Academia, Hospitals, Patient Groups, Governmental Agencies, SMEs, etc.



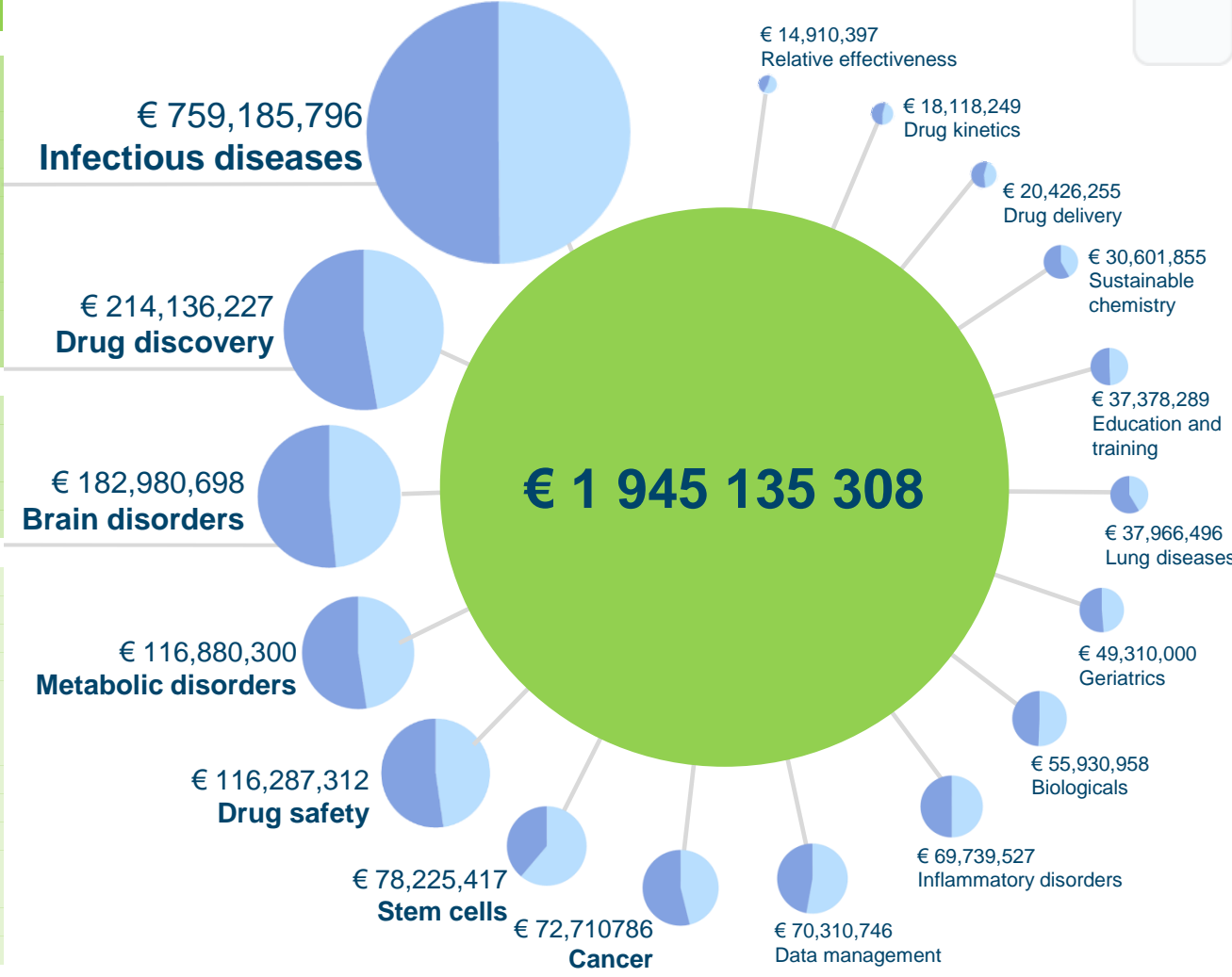


Partners

AiCuris	Johnson&Johnson
Animal Health	Medimmune
Division of Sanofi	Merck
Astellas	Merck Sharp & Dohme Corp
AstraZeneca	Merial
Basilea	Novartis
Boehringer Ingelheim	Pfizer
Cubist	Rempex
GSK	Sanofi
Janssen	

AstraZeneca	Novartis
Bayer	Pfizer
Janssen	Sanofi
Lundbeck	UCB
Merck	

Abbott	Janssen
AbbVie	Lundbeck
AC IMMUNE	Merck
Amgen	Novartis
Astellas	NOVO NORDISK
	Orion
AstraZeneca	Corporation
BIOGEN IDEC	Pfizer
Boehringer Ingelheim	Roche
Eisai	Sanofi
Eli Lilly	SERVIER
ESTEVE	UCB
Grunenthal	Vifor
GSK	



■ IMI funding
■ Corporate contribution

Strategic Research Agenda

Comprehensive framework
for a 10-year programme

Prepared with input from 80+
organisations (internet and
targeted)

Project ideas from industry
and third parties will be
screened against it

<http://goo.gl/jqMP9g>

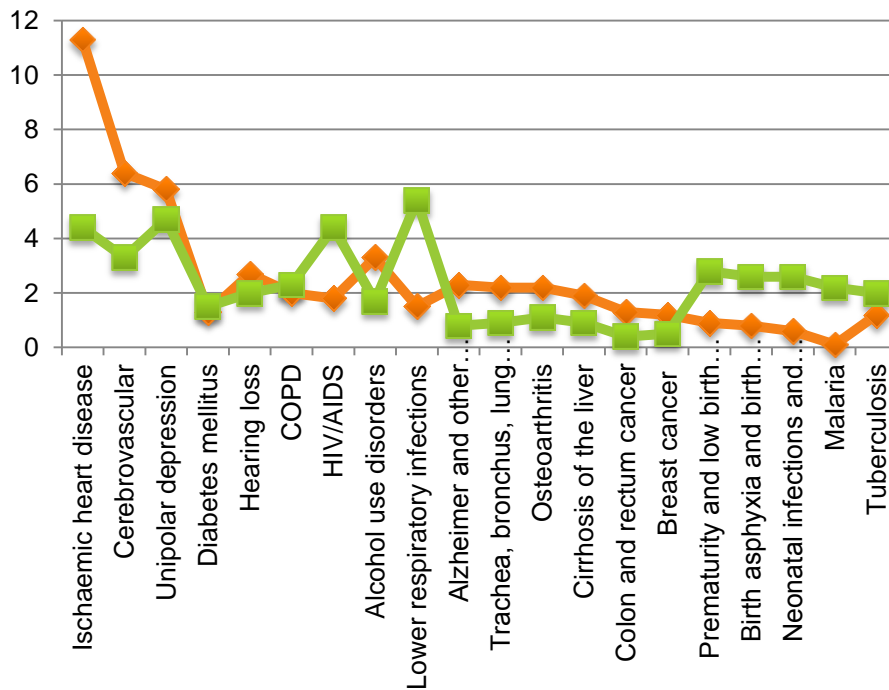


The right prevention and treatment
for the right patient at the right time

Strategic Research Agenda for
Innovative Medicines Initiative 2

All therapeutic areas covered by the Strategic Research Agenda

WHO 2014 report on priority medicines for Europe and the World : Percentage of DALYs for top 20 high burden diseases and conditions



Therapeutic Areas in IMI2 SRA (no priority order)

- 6.1. Antimicrobial resistance.....
- 6.2. Osteoarthritis
- 6.3. Cardiovascular diseases.....
- 6.4. Diabetes.....
- 6.5. Neurodegenerative diseases
- 6.6. Psychiatric diseases
- 6.7. Respiratory diseases
- 6.8. Autoimmune diseases
- 6.9. Ageing-associated diseases
- 6.10. Oncology.....
- 6.11. Rare/Orphan Diseases.....
- 6.12. Vaccines.....

Towards precision-medicine



Doctor:
“If this doesn’t help,
please come back, and I
will prescribe
something else.”

Patient:
“Is it not possible to get
something else right
away?”



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