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From Molecule through Market...

THE VISION IS CLEAR — to be successful pharmaceutical companies and their valued development partners need to understand the underlying challenges, trends, and opportunities that each molecule, compound, diagnostic, or biotech product faces as it progresses along the development continuum. Staying true to our vision that no sector can stand alone and succeed in an ever-increasingly complex market, PharmaVOICE has once again brought together dozens of industry executives to raise their VOICE on what they see happening in every phase of development and beyond. We thank them for providing their insights and predictions on what's happening in early development through postlaunch, and how the new Pharma 3.0 model will impact all areas of the pipeline and market.



As always, we are offering exclusive bonus editorial in our online edition. The content found online is more than just a mirror of the print version; it truly includes additional valuable insights and commentary.

Analysts at Booz & Company believe in the coming year pharmaceutical leaders will be focused on developing and stitching together a complex array of capabilities. Certain capabilities, including major outsourcing arrangements, matrixed organizational models, and collaborative partnerships with stakeholders, point to the need to effectively manage a networked enterprise. Success in this area depends on putting in place the right combination of formal and informal mechanisms that define and influence networked organizations.

Our experts agree, and furthermore predict the rise of superconsumers, who will be better informed because of technology-enabled processes and benefit from the shift in concentration from products to patients.

Booz analysts add that in the future, winning pharmaceutical companies will be capable pharmaceutical companies, which have identified clear decision-making, organization design, compensation systems, compliance, and business planning as important formal mechanisms for enabling accountability for results.

Booz & Company's 2012 Healthcare (Pharma) Industry Perspective reveals the latest thinking on key insights, trends, and the forecast for the year ahead that fall into four critical and rapidly changing aspects of the industry—research, commercial operations, supply chains, and networking.

While the industry faces serious problems, companies can survive and thrive if they adopt highly differentiated strategies. In addition to building capable R&D engines, a capable supply chain, and a networked enterprise, going forward, four trends will require not just more significant cuts in traditional resources, but a focus on building distinctive new capabilities. First, cost containment will continue to create a more restrictive market access environment with greater pricing pressures, additional reimbursement restrictions, and new or altered drug procurement systems. Next, new product launches will increasingly be focused on high-value specialty indications. Third, trade liberalization will open new opportunities in distribution and trade channels. Finally, emerging markets, which have very different healthcare models for marketing authorization, pricing, reimbursement, and distribution, are forecast to make up 30% of the global pharmaceutical market by 2015, compared with 19% in 2010.

For more information, visit booz.com.

Regards,

Taren Grom
Editor

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Their Word...

DENISE MYSHKO

Managing Editor



Phase II is becoming a critical stage for planning the potential launch and marketing of products.

ROBIN ROBINSON

Senior Editor



A successful launch requires a balancing act between cutting costs and investing marketing dollars early and wisely.

KIM RIBBINK

Features Editor



With a reputation for innovation, renowned scientists, academic excellence, and the largest population in Europe, Germany stands out as a pre-eminent pharmaceutical market.

CAROLYN GRETTON

Contributing Editor



Market researchers are making the transition from crunching numbers to providing invaluable insights for guiding the decision-making processes.

COMING in April 2012

- > Competitive Intelligence
- > Patient Communities
- > Clinical Trial Technologies
- > C-Suite: Digital/Interactive Agencies
- > Global Patient Recruitment
- > Market Report: France
- > Showcase Features — Medical Affairs and IRBs