

## Awards

### CURE AWARDS BIOSCIENCE ACHIEVEMENTS

Pfizer was awarded the CURE (Connecticut United for Research Excellence) Award for Excellence for its investment in multiple approaches to treating Alzheimer's disease. Pfizer has seven Alzheimer's clinical projects ongoing and several more programs in earlier stages of development at its Groton research site.

The CURE New Operations Award was presented to MannKind Corp., which operates a manufacturing facility in

Danbury. The facility includes custom processes for the manufacture and packing of Afrezza, the company's new insulin therapy, a drug-device combination consisting of a pre-metered dose of insulin powder and an easy-to-use inhaler.

The CURE Education Award was presented to Boehringer Ingelheim, which has funded Boehringer Ingelheim Science Quest, a multifaceted science outreach program aimed at elementary school children. The program includes a state-of-the-art mobile lab that will visit schools throughout Connecticut.

## Jobs Report

### Biosciences Industry Experiences Growth

The U.S. bioscience industry continued to score employment gains through 2008, the first year of the recent economic downturn, according to a study by Battelle and the Biotechnology Industry Organization (BIO). The Battelle/BIO State Bioscience Initiatives 2010 shows that publicly traded bioscience-related companies on the whole generated positive net growth through 2009.

- U.S. employment in the bioscience sector reached 1.42 million in 2008, a gain of 19,000 U.S. bioscience industry jobs since 2007.
- Employment in the sector grew 1.4% in 2008, while private sector employment declined by 0.7%.

- Rapid growth in the biosciences has been fueled primarily by research, testing, and medical laboratories. The subsector added more than 176,000 jobs between 2001 and 2008, accounting for 9 out of every 10 new bioscience jobs created during this time period.
- The sector continues to be a source of high-wage jobs. The average bioscience job paid \$77,595 in 2008, \$32,000 more than the average private sector job.
- Each bioscience job generates an additional 5.8 jobs in the national economy.
- 39 states, the District of Columbia, and Puerto Rico have an employment specialization (20% or more concentrated than the nation) in at least one of the four bioscience subsectors.

## Healthcare Reform

### Consumers Know Little About Healthcare

Despite difficult economic times and ongoing healthcare reform, consumers' attitudes about the U.S. healthcare system remain largely unchanged from 2009 to 2010, according to Deloitte's 2010 Survey of Health Care Consumers. Consumers often display largely contradictory behavior when it comes to their healthcare and are more

likely to relate to their own personal experience, often taking a micro view of a macro problem.

- 76% of consumers grade the system a C or below.
- Half believe that 50% or more of healthcare dollars are wasted.
- More than half (56%) believe that waste is a result of redundant paperwork and an individual's lack of responsibility.
- Less than a quarter (23%) of consumers believe they understand how the healthcare system works.

SOURCE: DELOITTE

## TUNING IN...

### Featured Podcasts

 **U.S. and Global Information Security Standards in Patient Recruitment**

**Featured Thought Leader:** Roger Smith, Acurian

 **Partnership Model for Clinical Development is Driving the Industry's Clinical Transformation Agenda**

**Featured Thought Leaders:** Nagaraja Srivatsan, Ramana Reddy, and Krishnan Rajagopalan, Ph.D., Cognizant


 **Clinical Delivery Alliances in Drug Development**

**Featured Thought Leader:** Tim Dietlin, INC Research


 **Getting the Most Out of Your Cloud Computing Investment: Creating the Flexible Pharma Organization**

**Featured Thought Leader:** Matt Wallace, Veeva Systems

### Featured White Papers

 **Patient Data Security: A Paramount Issue in Clinical Trial Recruitment**, sponsored by Acurian

 **Five Ways Intelligent Communications Can Transform the Life Sciences**, sponsored by Avaya

 **Partnership Model for Clinical Development is Driving the Industry's Clinical Transformation Agenda**, sponsored by Cognizant

 **A New Approach to Outsourced Drug Development: How Sponsor-CRO Clinical Delivery Alliances Improve Performance**, sponsored by INC Research

 **Uncovering the Hidden Opportunity: The Power of Clinical Data Gap Analysis**, sponsored by Snowfish

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## Global Market

### Industry Predicted to Grow by 4% to 6%

The size of the global market for pharmaceuticals is expected to grow almost **\$300 billion** over the next five years, reaching **\$1.1 trillion** in **2014**, according to IMS Health. The **5% to 8%** compound annual growth rate during this period reflects the impact of leading products losing patent protection in developed markets, as well as strong overall growth in the world's emerging countries.

Global pharmaceutical sales growth of **4% to 6%** is expected this year, consistent with IMS's prior forecast. In **2009**, the market grew **7.0%** to **\$837 billion**, compared with a **4.8%** growth rate in **2008**.

In its latest analysis, IMS identifies the following key market dynamics:

- Geographic balance of the pharmaceutical market continues to shift toward pharmerging countries. Pharmerging markets are expected to grow at a **14%** to **17%** pace through **2014**, while major developed markets will grow **3%** to **6%**.
- The U.S. will remain the single largest market, with **3%** to

**6%** growth expected annually in the next five years and reaching **\$360 billion** to **\$390 billion** in **2014**, up from **\$300 billion** in **2009**.

- Higher growth will occur in those therapy areas where there is significant unmet clinical need, high-cost burden of disease, and innovative science that can bring new treatment options to patients. In the areas of oncology, diabetes, multiple sclerosis, and HIV, annual growth is expected to exceed **10%** through 2014.
- Broad cuts in spending applied by public payers to reduce growth in drug budgets. Publicly funded health systems are under pressure to reduce growth in drug budgets following the global economic downturn.
- Over the next five years, products with sales of more than **\$142 billion** are expected to face generic competition. Collectively, the impact of patients shifting to lower-cost generics in major therapy areas such as cholesterol regulators, antipsychotics, and anti-ulcerants will reduce total drug spending by about **\$80 billion** to **\$100 billion** worldwide through **2014**.

## Funding Environment

### Venture Capital Funding Slows

Venture capital (VC) funding in the life-sciences sector, which includes the biotechnology and medical device industries, captured the highest percentage of VC dollars invested during the first quarter of **2010**, according to the PricewaterhouseCoopers and NVCA MoneyTree Report, based on data from Thomson Reuters. Life-sciences funding for Q1 **2010** totaled **\$1.3 billion** in **160 deals**, which represents **28%** of all venture dollars invested and **23%** of total deals during the quarter.

Despite capturing the largest percentage of total dollars invested, life-sciences investments dropped compared with Q4 **2009**, when **\$1.8 billion** was invested into **202 deals**. This represents a decline of **26%** in dollars and **21%** in deals from Q4 **2009**. The first quarter of 2010 reversed an upward trend in deal activity, which had grown for three previous quarters.

- For all sectors, venture capitalists invested **\$4.7 billion** in **681 deals** in the

first quarter, a decline of **9%** in terms of dollars and **18%** in terms of deals, compared with Q4 **2009**, when **\$5.2 billion** was invested in **832 deals**.

- The investment split for the life-sciences sector in the first quarter of **2010** remained consistent with previous years. Biotech accounted for **61%** of dollars with **\$825 million** going into **99 deals**.
- Both early- and later-stage funding decreased in terms of dollars from the previous quarter. In Q1, later-stage funding decreased by **11%**, and early-stage investments decreased by **36%** from the prior quarter.
- Three of the seven biotechnology subsegments exhibited growth in the first quarter. Industrial biotech grew from **\$22 million** in the last quarter of **2009** to **\$81 million** in the first quarter of **2010**.
- Biotechnology research grew from **\$19 million** to **\$34 million** during the most recent quarter while investment in the biotechnology/ pharmaceutical subsegment remained stable, growing **5%** from Q4 **2009**.

## Financial Performance

### Biotech Industry Shows Resilience

The global biotechnology industry was able to weather the continued worldwide economic turmoil and deliver a strong financial performance in 2009, with the world's established biotech centers reaching profitability for the first time in history. But the gap between the haves and have nots in the industry continued to widen in **2009**, posing new challenges for emerging companies in accessing the capital needed for R&D, according to Ernst & Young.

Key financial results:

- Companies in the industry's established biotech centers of the U.S., Europe, Canada, and Australia had an aggregate net profit of **\$3.7 billion** in **2009**, an improvement from the **\$1.8 billion** net loss in **2008**.
- Revenue of listed biotech companies fell by **9%** to **\$79.1 billion** in **2009** from **\$86.8 billion** the prior year. This was due to the exclusion of Genentech in **2009** as a result of its acquisition by large pharmaceutical company Roche. If Genentech is excluded from both years, industry revenue would have grown by **8%**.
- Companies in the U.S., Europe, and Canada raised **\$23.2 billion** in **2009**, a **42%** increase compared with **2008**.



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### Who Should Attend:

marcusevans invites senior level executives from leading pharmaceutical or biopharma industries with responsibilities or involvement in the following areas:

- Clinical Research
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- Clinical Operations
- Regulatory Affairs
- Site Director
- Study Director
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- Medical Affairs
- Global Clinical Affairs
- Regional Clinical Affairs
- Global Development Operations
- Regional Development Operations
- Clinical Outsourcing

### Book Online at:

[www.marcusevansch.com/ClinicalResearch2010](http://www.marcusevansch.com/ClinicalResearch2010)

### Current Speakers Include:

#### Randy Brenner

Vice President Worldwide Regulatory Strategy  
Emerging Markets  
**Pfizer**

#### James Garner

Vice President and General Manager, Clinical Research  
**Takeda, Singapore**

#### Matilde Damian

Director, Clinical Research  
**Bristol-Myers Squibb Mexico and Central America**

#### Ana Maria Valderrama, M.D.

Area Head Clinical Operations Canada / Latin America / Africa / Middle East Region  
**Pfizer**

#### Julio Gallego

Medical Director, Americas  
**Covidien, USA**

#### Dominique Lagrave, Pharm D.

Senior Director, Regulatory Operations and Innovations  
Clinical Development Medical and Regulatory Affairs  
**Novo Nordisk Inc.**

#### David Gil

Senior Manager, Clinical Programs  
**Abbott Vascular, Cardiac Therapies**

#### Annie Lyubchenko

Manager, Global Regulatory Affairs Strategic Policy and Support  
**Johnson and Johnson**

#### Stephanie Pfister

Senior Manager, Global Clinical Development  
**Otsuka Pharmaceutical Development & Commercialization, Inc.**

#### Simon Diaz, Ph.D.

Director, International Regulatory Affairs  
**Cephalon, Inc.**

#### Ana Polanco MD, MSc

Medical Director  
**AstraZeneca, México**

#### Sue Dubman

Senior Director, Chief Data Officer  
**Genzyme**

#### Helen Niu, MD, PhD

Director & Regional Head Global Clinical Site Management, Asia Global Development Operations  
**Amgen, Inc.**

#### William Chang, JD

Associate Director, Clinical Operations  
**Gilead Sciences**

#### Dave Young

CEO  
**Trifecta MultiMedical**

#### Alden Meier

CIO  
**Trifecta MultiMedical**

#### Carlos Sanmarco

Clinical Operations Manager  
**Eli Lilly, Brazil**

#### Susan P. Williams

Senior Director, Global Operations – Americas  
**Actelion Pharmaceuticals**

#### David Passov

President, Chief Operating Officer  
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#### Tufail Syed MD

General Manager, India  
**Medpace**