

Patient-friendly Injection Systems, Market Trends & Developments

Brigitte Reutter-Haerle,
VP Product Management & Marketing, Vetter





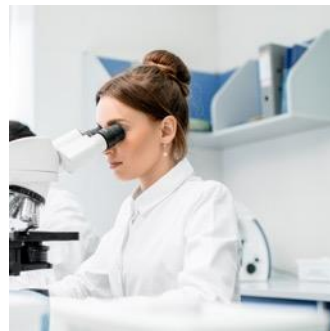
**“BEGIN WITH
THE PATIENT IN MIND”**

Global Healthcare Trends are Reshaping the Biopharmaceutical Market



Chronic disease

Increasing incidence and growing economic impact



Development costs

Increasing industry demand for cost- and time-saving solutions



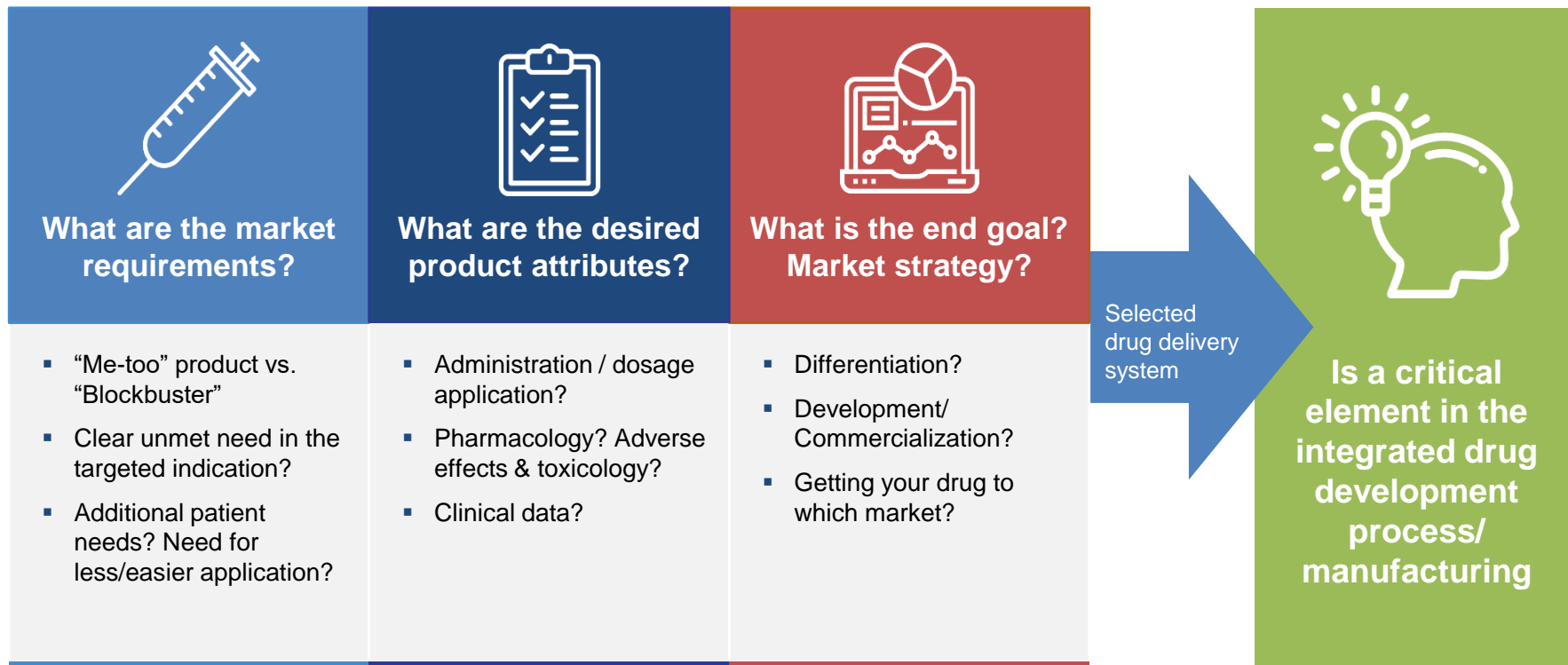
At-home care

Migration of hospital- and clinic-based treatments to ancillary or home-based settings

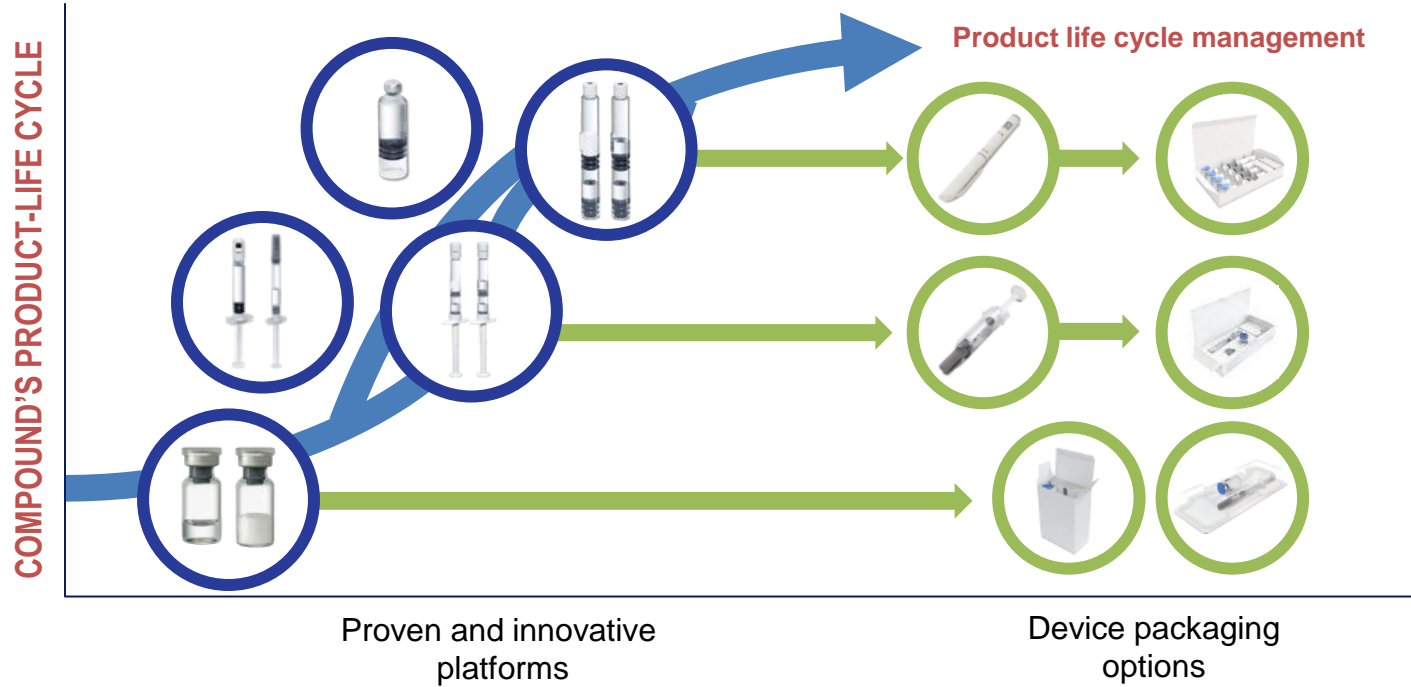


COVID-19

New social and safety trends further accelerating demand for self-administrative treatment options



Responding to the Demand for Patient Convenience



Prefilled syringes: Differentiating Benefits for Patients and Care Teams



EXAMPLE

Ease of use

Fewer prep steps than a diluent vial

Enhanced safety

Less risk of dosing errors or contamination

Increased comfort

Better user experience for patients and healthcare professionals

Improved compliance

Predefined volumes simplify adherence to treatment regimens

Reduced injuries

Less potential for needle sticks

Product differentiation

Sharper competitive edge in a growing market

Pen, Autoinjectors Support Home Care Treatment

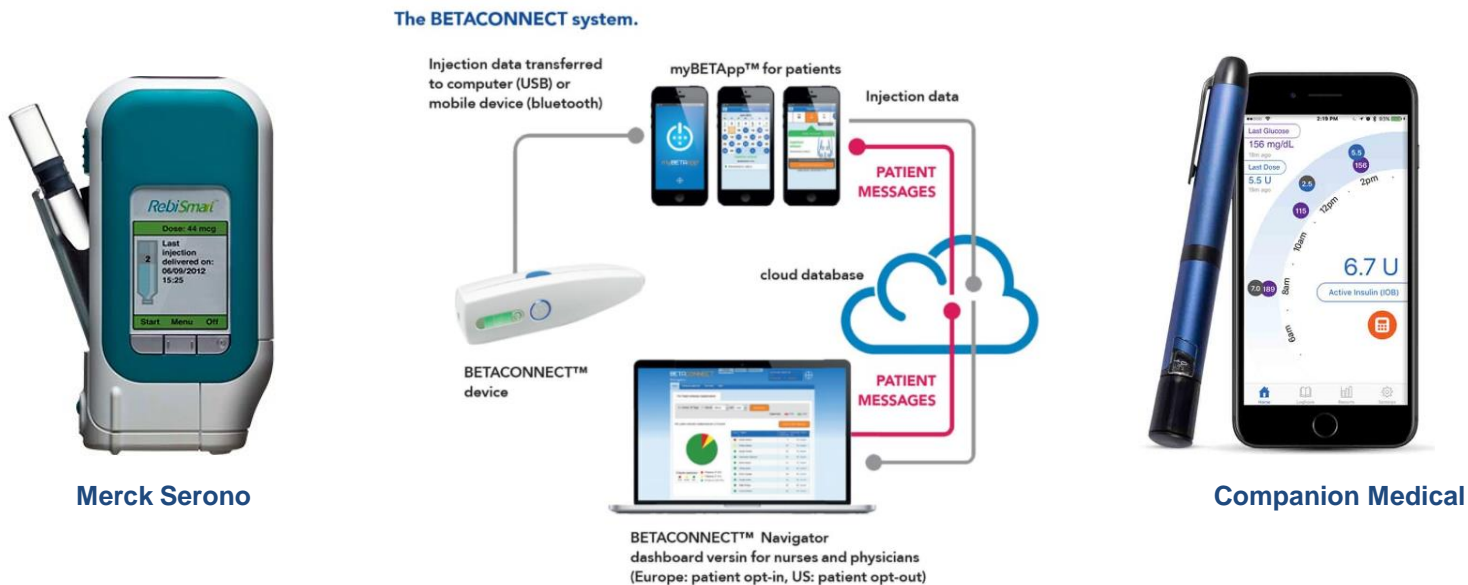
EXAMPLES

MODEL	UNOPEN™	LYOTWIST™	YPSOMATE®	DAI™ / (MOLLY™)*	PHYSIOJECT™
Device	Pen	Pen	Autoinjector	Autoinjector	Autoinjector
Supplier	Ypsomed			SHL Group	BD
Formats	1.5ml/3ml cartridge	1ml cartridge (dual-chamber)	1ml-l/2.25ml syringe	1ml-l	1ml-l



Smart Devices and Connectivity support Patient Adherence

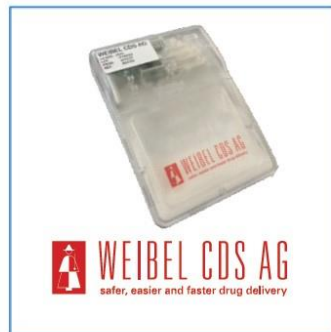
EXAMPLES



BETACONNECT™ Navigator dashboard versn for nurses and physicians (Europe: patient opt-in, US: patient opt-out)

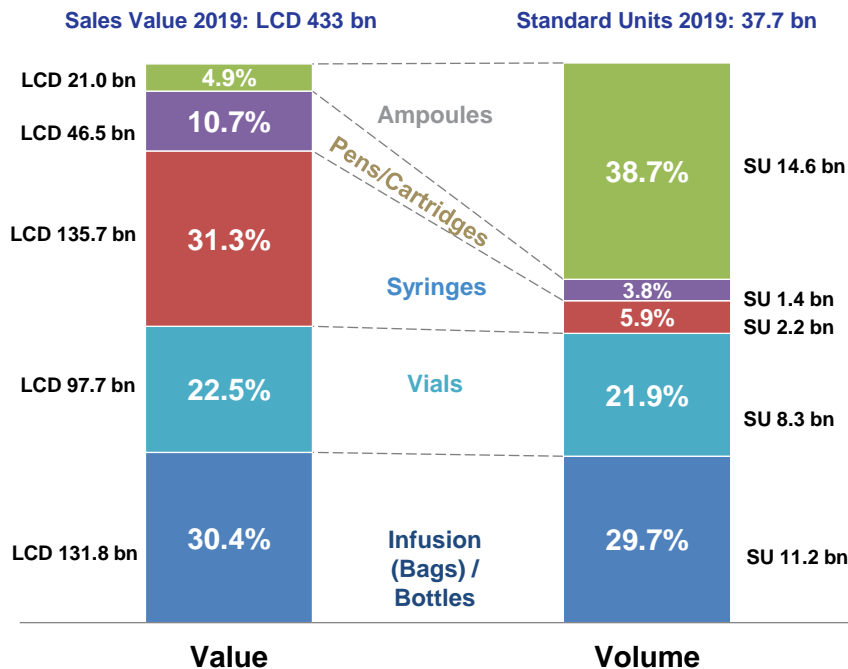
Wearables Supporting Larger Volumes

EXAMPLES



Small Volume Parenterals¹ have a Market Share 32% by Volume in 2019

Market Share of Parenterals in Value & Volume by Systems² (NA, EU and Asia w/o ROW³)

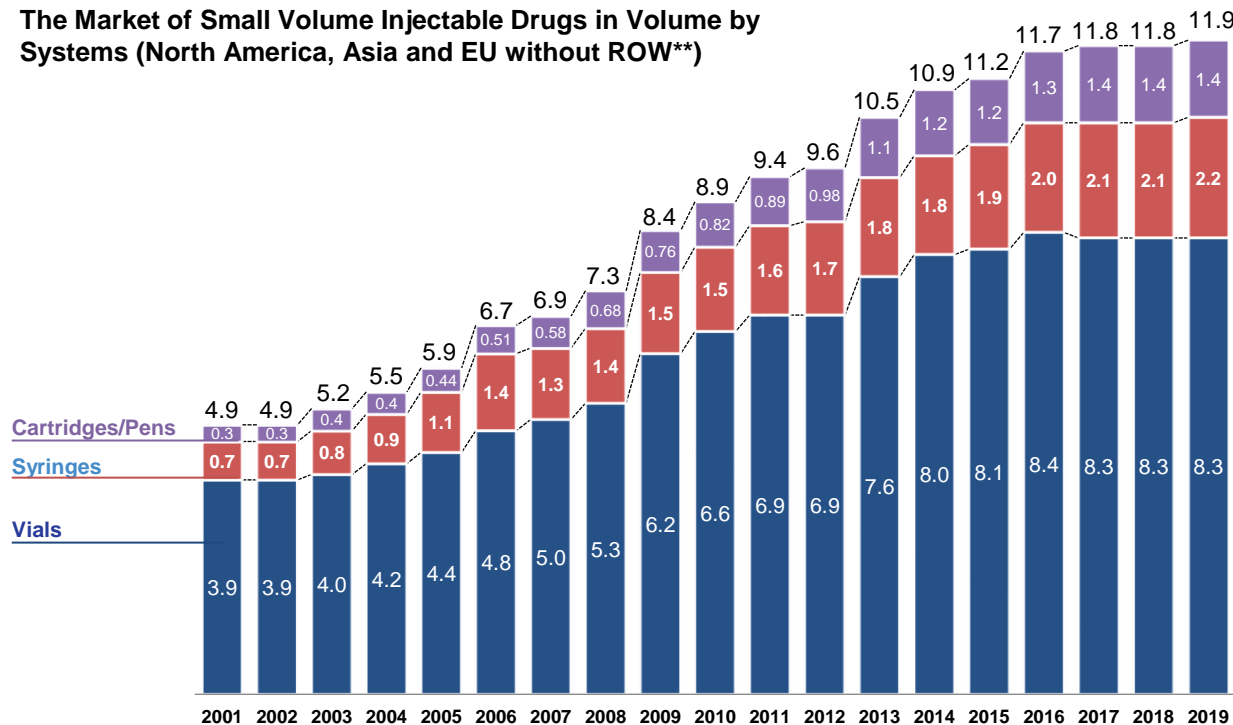


Market Shares of Parenteral Systems by Volume vs. Value

- Syringes and Infusions show the greatest Value share with ~31%, followed by vials (23%)
- Ampoules show the greatest Volume share with 39%, followed by infusions (30%) and vials (22%)

The Injectable Market is Steadily Growing since 2001

The Market of Small Volume Injectable Drugs in Volume by Systems (North America, Asia and EU without ROW)**



Total Sales Volume (SU bn)

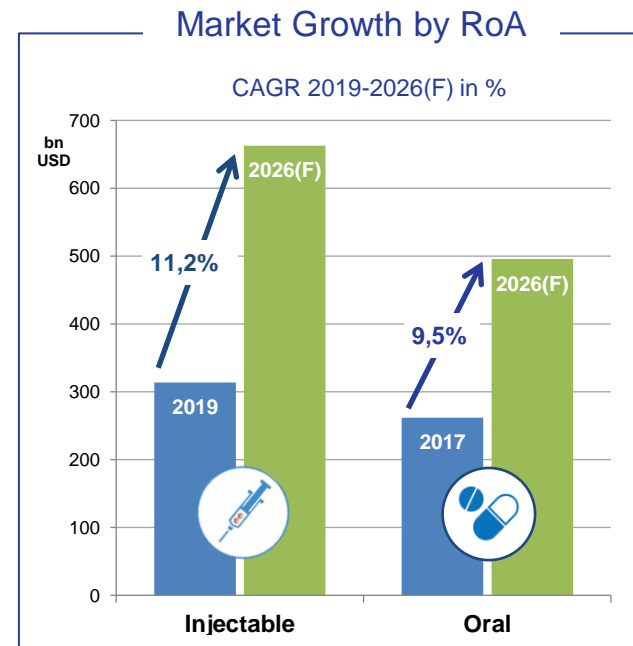
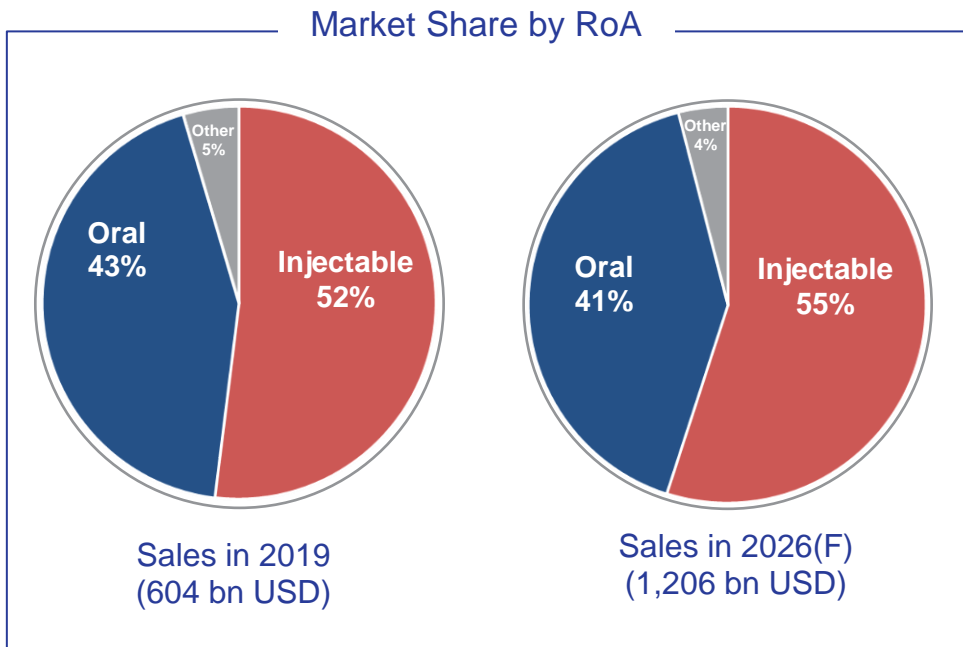
System	Share 2019	CAGR 2001-2019
Cartr./ Pens	12.0%	8.6%
Syringe	18.6%	7.0%
Vial	69.4%	4.3%
Total SVP*	100%	5.1%

* SVP = Small Volume Parenterals: Vials, Syringes, Cartridges/Pens

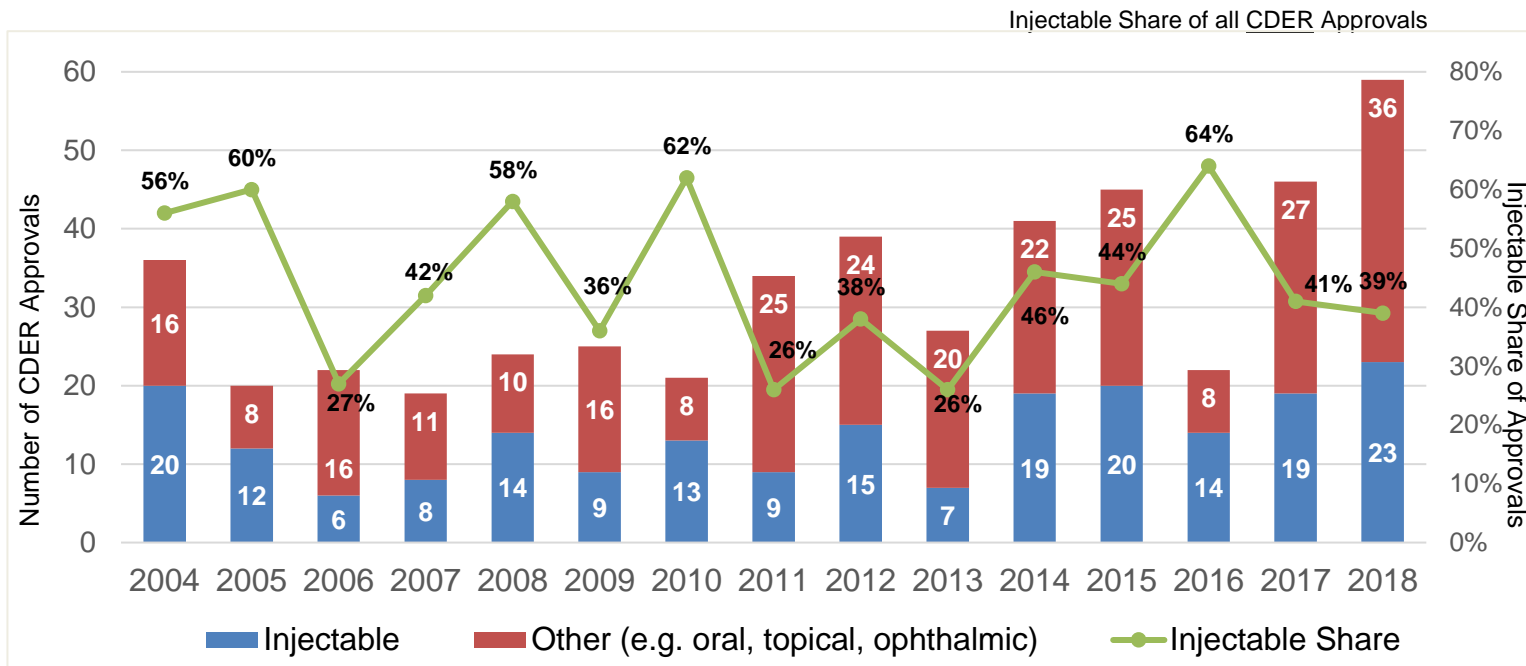
Source: IQVIA Customized Studies (*excluding infusion bottles/bags, ampoules and implants)
 **ROW: Australia, Africa, Asia Middle East, South America

The Share of Sales Revenue for Injectables is Expected to Further Increase

Global Pharma Market Forecast by Route of Administration (RoA)

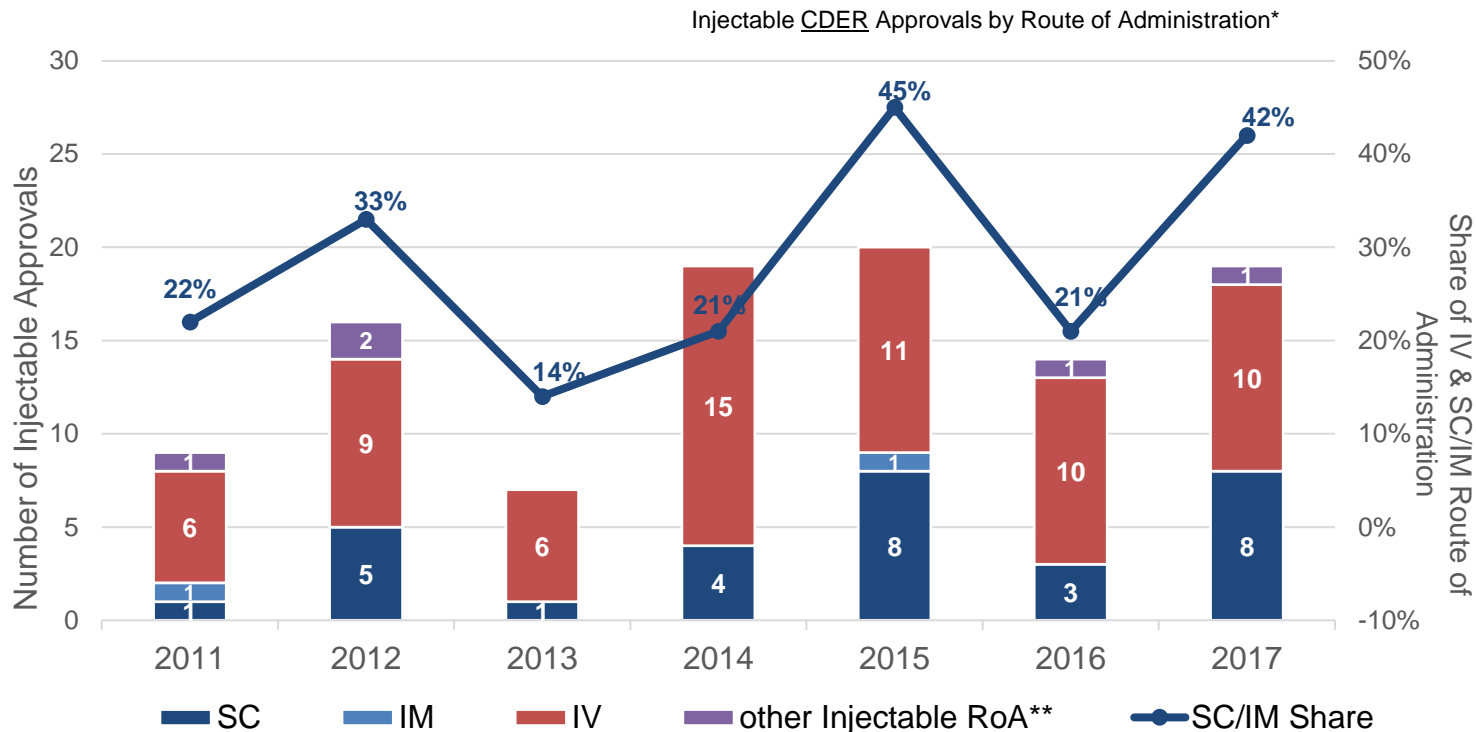


FDA New Drug Approvals Share of Injectable Drugs is ~ 44%



FDA injectable new drug approvals range between 15-20 per year (2014-2018)

New Injectable Drugs administered by SC or IM route are Increasing



* A single substance can be approved in multiple dosage forms
 ** Intrathecal, intracerebroventricular (ICV), intravitreal

The Future Global Pharmaceutical Market looks Promising



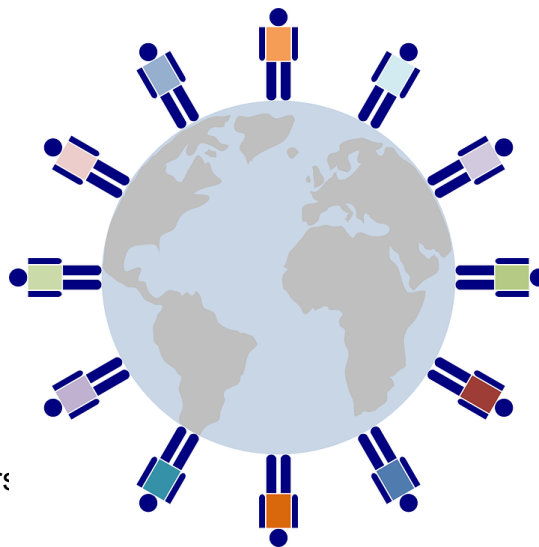
Global Medicines spending will reach nearly **\$1.5 trillion** through 2023, rising **4-5% CAGR**



Significant innovations will contribute to most global growth, particular in developed market



Lower economic growth triggers **slower expansion** for medicine use in Pharmerging markets



Key trends and Developments in Health Care

01

Increasing regulatory and cost pressure

Becoming an increasing hurdle impacting the way healthcare firms develop products

02

Maturing personalized medicine

Companies are increasingly focusing on this segment

03

Our conception of healthcare is changing

Healthcare is changing to prevention healthy behavior and real-time care

04

Supply chain is becoming an issue

Better ways to forecast demand and build of flexible supply chains

05

High spending for non-communicable diseases

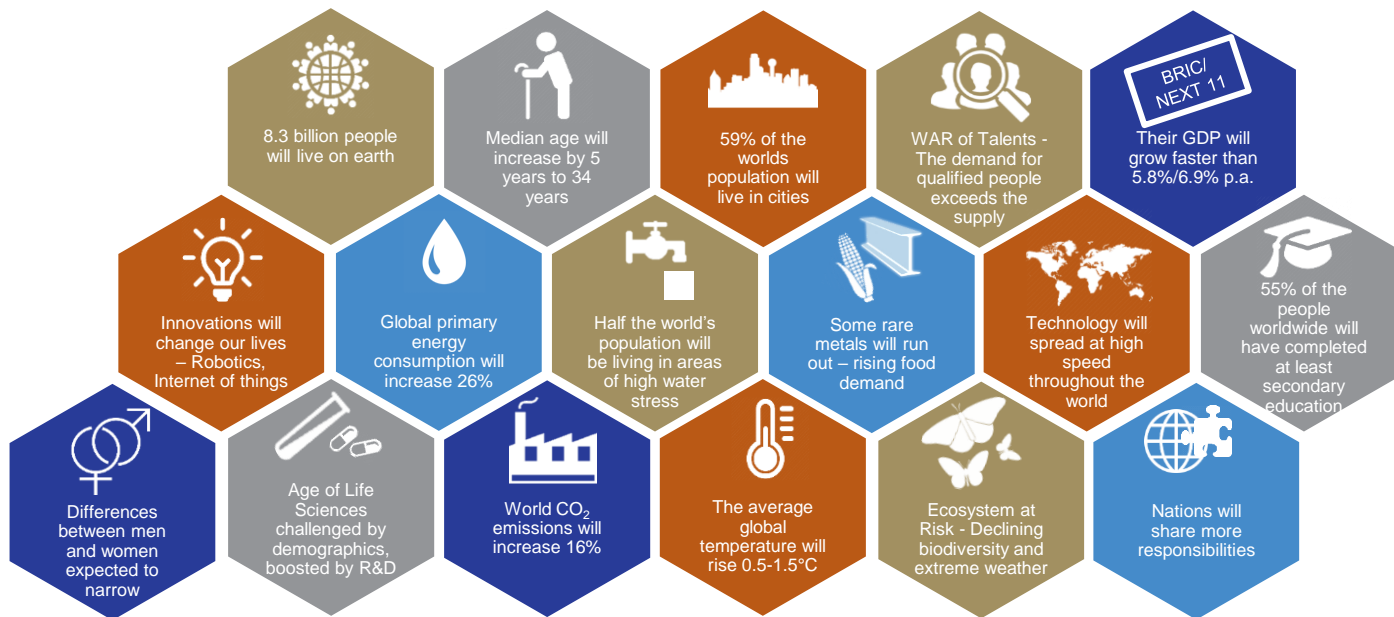
Especially cancer, cardiovascular and chronic respiratory diseases and diabetes

06

Big Data and mobile health on the rise

Healthcare smartphone apps and Big Data making real-time information and analysis possible

Future Trends will influence Health Care



Source: Roland Berger, Strategy Consultant, Trend Compendium 2030

Thank you for your attention!

More about Vetter
www.vetter-pharma.com

Disclaimer:

This presentation does not constitute a recommendation nor a qualification of the mentioned manufacturers and products, and makes no claim to completeness. It merely reflects the personal views of the speaker.

Copyright:

All texts and images contained in this presentation are protected by copyright. Some of the images, graphics and photographs used in this presentation originate directly from the manufactureres websites and are protected by the respective copyright terms.