

National Pharmaceutical Congress Summer Webinar:
Beating the Clock on Pharma's Post-Covid Countdown



Pre-Meeting Executive Summary

JUNE 22, 2021
11:00 AM EST

This report has been prepared for the exclusive use of registrants to the 2021 NPC Summer Webinar.

It provides observations on changes to Pharma during Covid-19 and predictions for a post-Covid world.



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Low awareness of rare diseases increases morbidity and potential mortality

A rare or orphan disease is a condition that affects less than one in 2,000 people, according to the European Commission on Public Health. There are more than 7,000 individual rare diseases, affecting an estimated 300 million people worldwide.

Most rare diseases are caused by genetic defects. This has created an opportunity for therapeutics such as monoclonal antibodies, gene therapies, and stem cell therapies. However, challenges involved in developing drugs for rare diseases include difficulty recruiting for clinical trials, and issues with securing research funding.

According to the Rare Genomics Institute, only about 400 orphan diseases are treated with pharmacotherapy, which indicates a need for pharmaceutical companies to develop therapies.

Another obstacle is low disease awareness, which can reduce a physician's ability to accurately detect symptoms and a patient's ability to access treatment. Patients can experience significant morbidity for many years before receiving an accurate diagnosis. This late diagnosis can lead to increased mortality when a disease that affects multiple organ systems remains untreated for a long period of time.

Interactions between medical professionals and the public should be optimized so that people can feel comfortable approaching their doctor with health concerns, in order to access appropriate clinical assessments and treatment.

B.C.'s life sciences sector aims for key policy changes in push for growth

A report by the Greater Vancouver Board of Trade outlines the economic benefits of the life sciences sector and the challenges it faces. The Board of Trade is calling for policy changes to help maximize growth.

The report notes 18,000 people were employed in the sector in 2020, up from 17,300 in 2018. The industry recorded nearly \$5.4 billion in revenue in 2018—up 5.6% from 2017.

“Given the momentum experienced due to Covid-19 response initiatives, continued rapid growth is anticipated,” the report states.

“Barriers to success include complex regulatory, reimbursement and procurement processes that impede the adoption of innovations, and a lack of consistent growth capital and commercialization incentives.”

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The report is recommending six policy changes in British Columbia:

- More investment in attracting talent;
- Creation of a dedicated life sciences fund;
- Streamlined regulatory and tax policies;
- Better procurement strategies;
- Better access to data; and
- Further investments in lab and manufacturing infrastructure.

Additionally, according to Gordon McCauley, CEO of adMare BioInnovations Inc., while well-capitalized companies are developing more lab and manufacturing space, the province risks losing start-ups to other regions if they can't afford to remain in B.C.: "Emerging companies need somewhere to prove their science and [its] commercial value."

Covid-19 makes consultants rethink ways of working with clients

When the pandemic pushed staff into fully remote work, consultancies were enthusiastic experimenters with new ways of collaborating between staff, and with clients. Firms in the U.K.'s Leading Management Consultants ratings say the ease with which they have adapted to the pandemic reality reflects their mobile working habits. Enforced remote working has made firms think about the future of work, for them and for their clients.

A recent survey by the Management Consultancies Association (MCA) found that, while more time spent servicing clients was one of the top three benefits of working remotely, 73 per cent of the consultants surveyed said spending less time with clients was the biggest drawback. The advantages of more remote work, according to Tamzen Isaacson, chief executive of MCA, include the ability of clients to tap a larger pool of advice.

Laura Empson of City University's business school, who studies professional services firms, warns consultants against assuming that techniques that worked for them during lockdown can also be applied wholesale to clients. Gitte Ganderup, co-founder of Arca Blanca, agrees, adding: "You have to work with the current culture of the [client's] business."

Advising clients on a deeper shift is likely to keep consultancies busy for some time to come, they agree.

After Covid-19: What investment trends are taking shape in 2021?

During Covid-19, the markets rallied around life science companies and so did investors.

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Peter Meath, Co-Head of Healthcare and Life Sciences for Middle Market Commercial Banking at J.P. Morgan, is of the opinion the momentum will continue in 2021.

“There has been no better time, at least in my career, to start a business in life sciences in terms of the pace of innovation, and the amount of capital that’s focused on the space right now,” Meath observed.

With so many companies pivoting to developing Covid-19-focused technology, Meath said their success will depend on whether these solutions can be applied to other market needs.

A wider trend that’s been growing is the intersection of technology and biopharma, to support drug development from research and development; clinical trial design, recruitment and management; as well as manufacturing and the supply chain.

Another growing trend, he says, is investment at earlier stages of life science companies. “Some successful venture investors have helped academic institutions, scientists and doctors form technologies and spin them out. But now we are seeing more academic centres paying attention to this opportunity,” Meath said. “That can mean building better bridges to the investor universe or helping their scientists and doctors understand what it takes to get commercialization done.”





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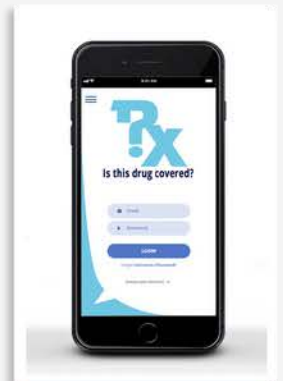
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Meeting Agenda

11:00am	WELCOME - Mitch Shannon CEO & Publisher, Chronicle Companies
11:05am	PANEL INTRODUCTION - Ben Parry Managing Director, The Pangaea Group
11:10am	GOVERNMENT AND INDUSTRY RELATIONS POST-COVID - Ronnie Miller President & CEO, Roche Pharmaceuticals Canada
11:15am	EXTERNAL DEPLOYMENT: THE VALUE OF REPS POST-COVID - Brian Canestraro General Manager, Intercept Pharmaceuticals
11:20am	SOCIAL IMPACT AND CREATING A PRODUCTIVE ENVIRONMENT POST-COVID - Pat Forsythe General Manager, Eisai Inc.
11:30am	INNOVATIVE SPOTLIGHT - Ben Parry
11:40am	PANEL DISCUSSION AND Q&A - Ben Parry
11:59pm	CLOSING REMARKS - Mitch Shannon



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* Adapted from Canadian Medical Association Workforce Survey 2019.
[†] Potential advantage versus new competitors



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Speaker Highlights



BEN PARRY

Managing Director of Pangaea Consultants and an experienced advisor on commercialization, channel optimization, and trade integration for pharma



PAT FORSYTHE

General Manager at Eisai Inc., a specialty pharma company focused on neurology and oncology, with experience in biologics, specialty and primary care



RONNIE MILLER

President and CEO of Roche Canada, responsible for the growth and success of the Canadian Pharmaceuticals Division, delivering innovative healthcare solutions



BRIAN CANESTRARO

General Manager of Intercept Pharmaceuticals, with over 20 years' experience in the pharmaceutical industry, including senior roles across Sales & Marketing and Market Access



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