making healthcare more accessible
CEO Welcome

About Zuellig Pharma

Our Mission, Our Services

Our People, Our Values

Plugging healthcare gaps in Asia
Quality healthcare access for everyone

All aboard the cold chain
The growing importance of temperature management

The journey to full immunity
Encouraging disease prevention and proper disease management

Battling today’s lifestyle illnesses
Drug solutions for modern day ailments

The rise of clinical trials
Asia’s unique position in meeting global demand

Working smarter
Harnessing Big Data to deliver better healthcare services

Warming up to Myanmar & Cambodia
Playing a role in healthcare reform for developing countries
2017 marked the halfway point in our journey to transform the Zuellig Pharma business.

Those of you who are familiar with us, know us as the people you trust to handle your brands and take them through the last mile. A few years ago, we started to look at how we could build on that promise of trust, as we continue to find more ways to support our communities.

Since then, we have grown our capabilities to include a suite of patient and payor solutions, commercial and channel services, data analytics and clinical reach. Our unique position as the bridge between manufacturers and medical professionals, has helped us identify industry-wide needs quickly and build practical solutions to meet them. We intend to continue to make full use of this position, for the benefit of the clients, customers and patients we serve.

The challenges we all face in providing quality healthcare in Asia are mounting, given unpredictable socioeconomic and geographical realities. Challenges that no single company, organisation or government can solve alone. Every day our teams work on building the right capabilities, networks and intelligence in the hope of being a unifying force focused on tackling some of the biggest healthcare issues together.

This annual publication was created to share some of the areas we have been working on. We hope that those of you who feel similarly compelled will reach out and work with us to provide better healthcare solutions for more communities in Asia.

Thank you.

JOHN DAVISON
CEO ZUELLIG PHARMA
About Zuellig Pharma

Zuellig Pharma is one of the largest healthcare services group in Asia. We provide world-class distribution, digital and commercial services to support the growing healthcare needs in this region. The company was started almost a hundred years ago and has grown to become a US$10 billion business covering 13 markets in Asia with over 10,000 employees.

Our purpose is to make healthcare more accessible.

Our people serve over 320,000 medical facilities in Asia and we work with over 1000 clients including the top 10 pharmaceutical companies in the world.

More recently, we launched our Zuellig Health Solutions Innovation centre to develop new services and address some pressing healthcare needs in Asia. Since then, our teams have been focused on creating data, digital and disease management solutions, supporting patients with chronic conditions and helping payors manage healthcare costs. We are also making headway in using big data to inform our decisions and those of our clients, on how to optimise for greater operational accuracy and efficiency.
PRESENT IN 13 COUNTRIES IN ASIA

SUPPORTED OVER 1,800 CLINICAL TRIALS

WORKS WITH THE TOP 10 PHARMACEUTICAL COMPANIES

WAREHOUSES ACROSS THE REGION 76

EMPLOYS OVER 10,000 EMPLOYEES
Our Mission

As one of the largest healthcare services groups in Asia, we will continue to grow by being true to our mission of making healthcare more accessible. Since 2015, we have been on a journey of transformation to bring new solutions to the industry, building on our capabilities as a specialist healthcare distributor.

Our focus in Asia makes us familiar with its diverse culture and needs. We tap into our strong local network of healthcare facilities, professionals and regulators for reliable market intelligence to stay on top of the evolving healthcare environment.

Our reputation is built on our commitment to compliance and quality. We own and operate some of the most advanced cold chain facilities that safely manage temperature sensitive medicines. Our team are proud of our values and how we operate with integrity.

We provide progressive solutions to meet changing healthcare needs. The Zuellig Health Solutions innovation centre pioneers new ways to address healthcare challenges including data analytics, commercial services, and patient and payor services.
Our Services

**DISTRIBUTION**

Our end-to-end solutions and extensive distribution network provides access to all relevant channels in even the most remote areas of Asia.
- Transportation
- Pick & Pack
- Warehousing
- Redressing
- Cold chain solutions

**PATIENT CARE**

We provide innovative healthcare solutions that encourage healthier lifestyles, drive prescription adherence and improve health outcomes.
- Patient Education & Public Awareness
- Affordability solutions
- Disease Management & Patient Engagement Programmes
- Mass Vaccinations

**COMMERCIAL SOLUTIONS**

We launch and grow pharmaceutical products through agile sales and marketing models, and local trade channel expertise.
- Brand Development
- Lifecycle Management
- Regulatory Affairs Services
- Business Intelligence
- Market Research
- Medical marketing
- Pharmacovigilance

**PAYOR SERVICES**

Our payor services help companies and insurers develop plans and programmes to deliver high quality healthcare while minimizing administrative work and managing cost.
- Administration
- Cost Management
- Solutions and Interventions
- Data Insights and Advisory

**CHANNEL**

Our pharmacy chains in Taiwan, Malaysia and the Philippines go beyond dispensing medicine to also offering personalised healthcare, basic health checks and well-being advice.
- Comprehensive disease management programmes
- Training at our Life Plus pharmacy academy

**CLINICAL REACH**

We provide end-to-end clinical supply chain solutions to ensure clinical trials and research run smoothly.
- Clinical Research Planning & Design
- Clinical Trial Supplies & Logistics
- Clinical Research Technology Solutions
- Clinical Research Compliance & Quality Management

Through our analytics, we help to deliver targeted insights to drive growth and performance in key therapeutic areas.
- Market Intelligence
- Analytics Advisory
Our People

In 2015, Zuellig Pharma embarked on a 5-year journey to transform the way we make healthcare more accessible in Asia. This change saw shifts in our structure, our services and correspondingly, the different types of talent we need to drive this change.
Growing through transformation
We believe in managing careers, not jobs. This mantra underpins our performance development framework that includes Individual Development Plans and 8 Quarter Plans, where selected talent have career development profiles that start with a realistic view of their current capabilities and a roadmap to realise their aspirations for the future.

With changes also come new opportunities for development and through our Zuellig Pharma Mobility Programme, we work with our talents to successfully place them in roles that give them exposure to other countries, functions and business units.

Engaged in meaningful work
Despite going through a time of change, our business-wide Sustainable Employee Engagement Score has continued to improve by 2% year on year since 2013. Through various focus groups and the Employee Opinion Survey, we know that most of our employees are here because they are passionate and believe in our mission to make healthcare more accessible. Performing meaningful work every day, no matter what the role, is the driving force behind our improving levels of engagement.

Our reputation as a partner that values quality and conducts itself with integrity has been the cornerstone to our success. This is something that we are proud to say is true of the way we act internally as well. Our Code of Conduct ensures a culture of openness with the highest standards of probity and accountability through a ‘Speak Up’ Policy. We have also designed channels to ensure that employees raise serious concerns without fear of retaliation, discrimination or any forms of harassment.

A culture that encourages learning
As we continue to manage our diverse, multi-generational team, one of the key strengths is in our desire to develop talent. We run in-house training that teaches coaching skills, team collaboration, leading performance as well as how to be an effective manager.

We have region-wide training programmes such as the Young Talent and Advanced Management Programmes that create opportunities for employees to be mentored by Executive Team members and Department Heads. Our e-Learning platform provides free certification programmes and relevant courses to all our employees. We also offer an Employee Development Sponsorship Programme that provides financial support for employees to pursue training or part-time courses of their choice.

Our employees are here because they are passionate and believe in our mission to make healthcare more accessible.
PLUGGING Healthcare

making healthcare more accessible
One of the largest forces shaping the healthcare landscape today is the move towards Universal Health Coverage (UHC), driven by the WHO. Their goal is simple – for every person to receive the quality health services they need without suffering financial hardship. While not all countries have explicitly said that they are pursuing UHC, most governments are working on achieving the same goal.

What is also clear is that this goal cannot be achieved without close collaboration between the private and public sectors, including the general population, on a strategy that meets the unique needs of each country. This strategy also needs to prioritize investments, recognize trade-offs, and allow for priorities to shift as the economy develops, population ages or if diseases bring a different burden into play.

Given this, here are some areas we have been working on to address what the OECD and WHO have identified as healthcare gaps in Asia.
Building effective supply chains that contribute to advancing public health

By 2018, seven of the top 10 pharmaceutical products in the world will be biotechnology-derived large molecules, requiring refrigerated storage and handling at 2–8°C. The integrity and quality of these pharmaceuticals, and ultimately patient safety, are increasingly reliant on an intact cold chain during storage and transportation. Failure to maintain appropriate conditions at any point in the supply chain can impact the efficacy of the drug, resulting in the loss of a shipment and putting patients at risk. The industry’s migration to these new medicines injects tremendous complexity into the logistics process.

Beyond our temperature controlled warehouses, that are under constant surveillance by temperature sensors, we have developed the eZCooler - a unique thermal isolation system that maintains the temperature of a product for up to five days. This helps us deliver medicines like life-saving vaccines across Asia, particularly to rural areas. The eZCooler’s phase change material and vacuum insulation panels make it possible to maintain low temperatures without relying on external energy sources. It is also reusable and 100% recyclable, minimizing our environmental impact.

Given our geography, climate and rate of urbanisation, Asia is vulnerable to emerging communicable diseases, particularly zoonosis (diseases transmitted from animals), vector-borne diseases, and drug-resistant pathogens. Strengthening our supply chain infrastructure helps countries build resilience through control and response on top of disease prevention.

Our distribution footprint consists of Distribution Centres (DCs) supported by a network of sales offices. The DCs are strategically located and perform distinct roles for either nationwide or regional distribution, with most having capability for both. Individually, each DC has various levels of planned redundancies in systems and equipment, in order to ensure sustained delivery of critical services under a wide range of conditions.

In times of a pandemic, our continuity procedures kick in to ensure the situation is monitored, risks are continuously assessed, employees, clients and customers are up to speed, the identified actions for that stage are executed, and most importantly, plans and actions for the subsequent stage are pre-identified for the quickest and most appropriate response.

Improving the quality of healthcare through patient-centric solutions

While at a national level, legislators are exploring cost saving solutions like pooled procurement and government-funded healthcare programmes, there are still unresolved needs for individuals to receive quality healthcare without jeopardising their finances.

We work with governments and businesses to design programmes that pay attention to every individual’s disease prevention and management needs. Affordability solutions such as easy payment plans, discounted medicines and redemption offers are matched with patient education and support through remote interactions with medical professionals. To date, we have seen an increase in adherence by up to 300% in patients enrolled on our programmes.

In the last year, we have also brought to the region a series of advanced medicines like the first oral medication to treat uterine fibroids, a haemoglobin spray to accelerate healing in wounds and a series of drugs to help patients deal with hypertension. All of which have shown significant improvements in quality of health for Asian communities.
Promoting efficiency in the administration of healthcare

Asia is facing an underlying crisis of financial instability in healthcare provision, driving the need for innovative healthcare delivery and effective cost management. Aside from improving the general levels of health in any given population, the growing challenges facing leaders of payor organizations include financial performance, cost effectiveness, and quality of care.

We have worked with public and private payors to help contain costs, manage and track healthcare expenditure, minimize administrative work, identify waste or abuse in their systems and support the development of plans and programs that enable the provision of high quality care. Our subsidiary, MiCare is the market leader in payor solutions in Malaysia supporting over 4.8 million members from Malaysia and Thailand on its platform.

More recently, we have also invested in a HealthTech company that supports doctors and clinics in the administration of their practices from managing patient files to improving workflow. We have also introduced a tissue analytics system to help medical professionals track a patient’s healing wound with greater accuracy and efficiency, freeing up much needed time and resources for medical teams.

Supporting the development of medical professionals

The supply of doctors and nurses in the region is currently at 1.3 and 3.2 per 1000 people. This is well below the OECD average of 3.3 and 9.1 respectively. Over the years, we have consistently supported the education of doctors, nurses and pharmacists in various countries through scholarships or training. In anticipation for greater knowledge in chronic wound care given the rise in aging populations and NCDs, we have also invested in training healthcare professionals to be certified wound care experts under the German wound healing society ICW (Initiative Chronische Wunden).

Beyond our day to day operations, Zuellig Pharma is also increasing our dialogue with members of industry and government, to work towards a unified system that makes healthcare more accessible to the communities that we serve.

Many of these topics are elaborated in the pages that follow, with relevant contact details at the end of each article. If there is an area that interests you, please get in touch with us through the contacts provided here or your local Zuellig Pharma representative to see if there are ways we can work together.
The global cold chain market is poised to grow around 7.8% over the next decade to reach approximately US$339.15 billion by 2025.

One of the biggest driving forces behind this growth is the rising demand for pharmaceuticals that require temperature-control infrastructure and technologies. “Currently, more than 80% of the world’s pharmaceutical products require some form of temperature management to ensure product quality and efficacy is maintained, and this requirement will continue to grow with the expanding range of biopharma products entering the supply chain,” said Zuellig Pharma Corporate Head of Quality Assurance, Brett Marshall.

The efficacy of today’s higher value and structurally complex drugs can be destroyed through a single cold chain break, the integrity of controlled room temperature products can be impacted through inconsistent environmental conditions during distribution, while a weak link in the management of temperature sensitive clinical trial materials can impact study outcomes and lead to extremely costly delays in bringing new products to market.

These challenges, along with the globalization of supply chains and increased regulatory requirements, makes temperature management throughout the pharmaceutical industry a difficult but urgent matter to manage.
ALL ABOARD THE COLD CHAIN

The growing importance of temperature management
Changing market needs
One of the most significant changes within the pharmaceutical industry in recent years is the evolution of drug portfolios.

Many manufacturers are moving away from chemical pharmaceuticals towards more structurally complex biotechnology drugs. Biologics accounted for 29% of branded global pharmaceutical sales in 2014, while specialty drugs accounted for one-third of total drug costs in 2016 with expected growth to 50% in 2020.

Biologic pharmaceutical products have much stricter handling requirements and failure to adhere to these requirements at any point in the drug’s lifecycle can impact product quality and efficacy, put patients at risk or result in significant product waste and supply chain disruption.

Vaccines are one of the most common type of biologic drug that requires handling at temperatures between 2°C - 8°C to maintain its efficacy and safety. Any break in this cold chain, from production, to storage, transportation, or usage could damage the integrity of the vaccine, resulting in reduced efficacy and safety in treatment.

According to the World Health Organization, more than 50% of all vaccines manufactured in the world each year are destroyed during the storage and delivery process. To cope with this problem, the pharmaceutical industry has been investing in new solutions to mitigate the risk of temperature excursions. Zuellig Pharma’s eZCooler packaging system is one example of this. The eZCooler extends the holding time of temperature sensitive products to five days, versus two days with traditional systems ensuring the integrity of products to the last mile of distribution.

In the hot, often temperamental climates in Southeast Asia, this system has a big role to play in helping to ensure temperature-sensitive products reach their destination in good condition, particularly in remote, rural areas.

Clinical trial management
These changing needs impact the storage and distribution of finished products and impact clinical trial logistics. Biologic drugs are more sensitive to the external environment, requiring cold chain handling and more regulatory approvals during the clinical trial process. This can add significant cost to the trial and lead to study and drug approval delays.

Waste due to temperature excursions can therefore easily lead to stock-outs of required products, an inability to supply enrolled patients or re-supply issues for patients already under treatment in a randomized study. This could delay studies, pushing back the introduction of a new treatment or drug for patients and costing the trial sponsor millions of dollars in R&D costs as well as potential sales.

Compliance
Regulators are placing a much higher level of scrutiny on quality systems and processes and temperature management is one key element of this. Regulatory bodies require proof that all
drugs and biological components have been distributed within the required temperature range – meaning all processes and sub processes need to be validated to ensure there has been no negative impact on the safety, efficacy or quality of a product.

To do this, monitoring and reporting technology such as temperature monitors, sensors and track and trace systems are used. Much of this reporting is currently provided on a historical basis, at the end of a journey or delivery, but there is a growing trend towards real time monitoring which will provide alerts if the temperature deviates beyond the safe range.

Companies need to invest in more sophisticated supply chain infrastructure to comply with new regulations and while this can be costly, the cost of non-compliance is likely to be much higher. A single consignment of drugs being distributed can be worth millions of dollars and a cold chain break can mean an entire shipment needs to be written off while a recalled batch of drugs due to temperature excursion can lead to significant reputational damage or regulatory scrutiny.

How we help
Zuellig Pharma takes quality very seriously. All our warehouses are Good Storage and Distribution Practice (GSDP) and Good Distribution Practice (GDP) certified with annual audits to help us stay on top of quality management standards and develop more efficient processes.

Our Specialty Solutions Group maintains a network of 14 clinical trial depots across Asia, offering integrated storage, distribution, returns and destruction, re-labelling and a comparator drug-sourcing service.

Having supported over 1,800 clinical trials, our network of local and central depots have the knowledge and experience to provide a one stop shop clinical trial support. This enables sponsors to customise their clinical supply chain set-up for each study, taking into account regulatory considerations, risk aspects, required shipment turnaround times, and geographical focus, with the aim of balancing study objectives against cost.

We have shared our cold chain practices with governments around the region. In late 2017, we partnered with two departments under the Ministry of Health in Vietnam to support them in strengthening their cold chain capabilities nationwide. This involves working on a two-year programme with the National Centre for Control of Vaccines and Biologicals and the National Institute of Hygiene and Epidemiology, to enhance cold chain storage management and train more people in the careful handling of vaccines during distribution across Vietnam.
making healthcare more accessible
Encouraging disease prevention and proper disease management

Vacccines have been making headlines in recent times, with news stories from rapid outbreaks of preventable diseases to the race to find the cure that could help millions of people.

Over 646,000 people die globally from seasonal influenza each year. More than 233,400 cases of flu have been reported in Australia in 2017, which was more than double the number of cases compared to the year before. Close to one in five Singaporeans lose their lives to pneumonia making it the second most common cause of death after cancer.

These cases underscore the importance of vaccination which prevents an estimated two to three million deaths annually. Because of vaccination, polio is on the verge of eradication, death from measles declined by 79% worldwide, and 38 countries have successfully eliminated maternal and neonatal tetanus.

However, the road to creating a vaccine is a long and arduous one. It takes an average of 15 years or more to go through the necessary research, trials, regulatory approval and manufacturing before a vaccine is ready for use. As seen in the case of HIV, a global pandemic that has claimed a staggering 35 million lives, the hunt to develop a vaccine to stop HIV has entered its fourth decade with an estimated 36.7 million people still living with the disease.

While pharmaceutical companies invest in R&D to develop new vaccines, there are things we can do to alleviate the burden on our already stretched healthcare system by encouraging disease prevention and better disease management in our communities.
**Making vaccination accessible**

Despite the significant benefits of vaccination, affordability issues can be a significant barrier to immunization. Vaccines take years of research to develop and require careful handling across the supply chain, making them expensive to produce and distribute.

All players – from governments and manufacturers through to distributors and healthcare providers, need to come together and find ways to make vaccines available at a price that more people can afford.

Accessibility can also impact the uptake of vaccination programmes. “Although there might be many available financial support plans in place, families may be unaware of how to apply for them. This is where mass vaccination events at local pharmacies and clinics, particularly in remote or rural areas become very important,” Sandy Ho, Zuellig Pharma Head of CareConnect said.

Zuellig Pharma is partnering with the largest pharmacy chain in the Philippines to increase immunization demand through in-store marketing on the importance of being vaccinated and free-of-charge vaccine administration services.

The company has administered over 95,000 doses since establishing the partnership in May 2016 and works with the pharmacy to offer this service in more than 200 stores. “This is a fully integrated model. We work with the manufacturers to source the vaccines, distribute them to...
Reach out to Vice President CareConnect Moses Hee at MHee@zuelligpharma.com to find out how we can support patients with programmes to improve access to healthcare.

Vaccines take years of research to develop and require careful handling across the supply chain, making them expensive to produce and distribute.

Zuellig Pharma also works with companies to integrate vaccinations into their corporate medical insurance plans. Its subsidiary, MiCare, is Malaysia’s leading third party healthcare administration provider, helping companies and insurers deliver high quality healthcare to their members and manage ever-growing healthcare costs.

Zuellig Pharma Vice President CareConnect Moses Hee explained: “We work with companies to integrate immunization into corporate medical schemes. This not only benefits the employee but helps companies reduce sick days as well as their overall corporate medical costs.” Moses added that the company works with partners across the healthcare ecosystem to make this happen.

Improving disease management

It is estimated that up to 90% of the world’s 422 million diabetics do not have good control of their disease – an alarming statistic that has serious consequences for the individual and the overall healthcare sector.

We have been working on reversing this trend by empowering patients and extending care beyond clinic walls. This is where innovative solutions such as mobile apps and nursebots come in to remind patients to adhere to their treatments and monitor their conditions on the go.

Mobile apps can monitor a patient’s health parameters and send alerts if the patient is at risk of complications while nursebots can provide patients with ongoing support as they manage long and complex treatment programmes. These solutions, which are being developed by Zuellig Pharma, help patients manage their conditions, without placing any additional burden on healthcare providers.

Zuellig Pharma is also using data analytics to develop effective screening programmes to identify pre-diabetic patients. They will then be able to use mobile technology to help these people delay or avoid the onset of the disease by encouraging healthier lifestyle and diet choices.
Battling Today’s Lifestyle Illnesses
Drug solutions for modern day ailments
The World Health Organisation (WHO) confirmed that 70% of deaths were caused by non-communicable diseases (NCDs) in 2017, and that it is a real and growing threat in Asia. This is a result of a combination of genetic, physiological, environmental and behavioural factors. Lifestyle diseases could sometimes also be the consequence of poor diets, lack of physical activity, tobacco and alcohol abuse, and unsustainable environmental practices - attributes of most developing cities in this region.

The implications on the industry are significant, with added healthcare costs and greater demand for access to quality medicines emerging from the NCD epidemic. Medicines not only have to fight these diseases quickly and effectively, they ideally need to treat with minimal downtime to suit the urban patient pool.

Working with pharmaceutical partners, the Zuellig Pharma Commercial Solutions team has launched several innovative medicines to combat the rising issue of lifestyle diseases in Asia. Overseeing the end-to-end process of launching, development and marketing, the team has introduced products like the haemoglobin spray Granulox for the treatment of chronic wounds, Kanarb for the treatment of hypertension, and Esmya which is an oral therapy to treat symptomatic uterine fibroids.

Key industry and government stakeholders have been involved in the initial market trials for our in-licensed products, and the medicines have so far been well received. “These innovative drug solutions not only have high efficacy to treat lifestyle diseases, but have also delivered results in a quicker time — suited for a time-starved population,” shares George Eassey, Senior Vice President Commercial Solutions at Zuellig Pharma.

Building awareness for any new products require agile resourcing, deep understanding of regulatory policies and local medical and trade channel expertise. “We have been working in Asia for almost a century and have insights on each market and its requirements. Our extensive reach and strong relationships across the industry allows us to successfully launch and deliver these medicines to places that require them the most,” George comments.

“In an environment of stricter regulations, intensifying competition and pricing pressure in developing countries, successfully launching and growing brands relies very much on your knowledge of the local market. We have a wealth of data and experience that can be tapped on by partners who are keen to explore opportunities in this region.”

In-licensed Products from Commercial Solutions

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<td>Esmya is a first-in-class oral therapy for women to manage and treat the symptoms of uterine fibroids. Fibroids are the most common form of benign tumours in women of reproductive age, where one in every three patients experience symptoms that interfere with daily life. Treatment for fibroids usually involves surgery, which means hospitalisation and downtime for recovery. This makes Esmya a useful non-invasive option for patients as it effectively shrinks the size of fibroids, with no downtime.</td>
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<td>Kanarb is an oral therapy used for the treatment of hypertension. The first hypertension drug manufactured in Korea, clinical tests have shown that Kanarb was most effective in reducing blood pressure among new patients. Zuellig Pharma reached an exclusive licensing agreement to launch and market the anti-hypertensive drug Kanarb in 13 Southeast Asian countries, with particular focus on Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam.</td>
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<td>Granulox is the first wound care product to focus on increased oxygenation, healing chronic wounds in half the time and at half the cost. One gram of haemoglobin can transport up to one litre of oxygen per day. Granulox uses pure haemoglobin to improve oxygen supply and speed up healing in slow-healing wounds. Together with the product, we introduced a tissue analytics platform to help wound care practitioners analyse wounds and provide reports to track a patient’s development after using products like Granulox.</td>
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For more information or enquiries about Zuellig Pharma Commercial Solutions Group’s offering, please reach out to George Eassey SVP Commercial Solutions at geassey@zuelligpharma.com.
By 2020, the global market for clinical trials is expected to reach US$57 billion, an 80% increase from 2015. The majority of this demand is driven by a single region – Asia.

But what is causing this exponential growth? And why are more and more organisations turning to Asia, a region previously thought to be too complex and logistically challenging for their research needs? We investigate the top five growth drivers for clinical trials in recent times.

1. COMPARATIVE COST

The development process of a drug is a long-drawn process, taking an average of 10 years with clinical trials alone taking six to seven years on average. The average cost of development and getting market approval for a drug is over US$2.6 billion, and is only getting more expensive. While this upward trend is true globally, Asia offers immediate cost savings. Resources and staffing are far cheaper, with cost savings between 25 - 40% in China and India, which makes it more cost effective to bring a new product to market in the long term.
A lack of patients causes 50% of clinical trials to be delayed and 85% of clinical trials to fail

2 RECRUITING PATIENTS
The longer it takes to recruit patients, the higher the overall cost of the trial. According to Forte research, a lack of patients causes 50% of clinical trials to be delayed and 85% of clinical trials to fail as they are unable to retain enough patients once begun.

Asia is uniquely positioned to address this problem, with over 60% of the world’s population found in this region. Over 2 billion people in Asia live in high-density cities, where they can be more easily recruited for clinical trials. These patients tend to have a different perspective on clinical trials, recognising the potential of gaining access to new and innovative treatment, which they may not otherwise be able to afford.

3 REGULATIONS
While Asia is diverse and complex, given the number of countries and their differing policies, it can be far simpler to conduct a clinical trial here compared to other regions. Georg Schulz, General Manager (Clinical Reach), thinks this is a major factor driving the influx of clinical research organisations (CROs) who are choosing to expand their operations in Asia. Georg says, “Starting a clinical trial in Europe or the United States has a significantly longer lead time due to the regulatory complexity in these areas. The longer it takes to start the trial, the longer it takes to commercialise the product.”

4 ASIA-SPECIFIC TREATMENT
From diseases that are specific to this region to medicines that are more responsive to Asian biology, there is a growing need for treatment that has been designed with Asia in mind. Pharmaceutical companies are recognising this and choosing Asia as the destination for clinical trials, not just as a cost-saver but as a necessity to test innovative new treatments on the population who will ultimately be the ones that benefit.

5 GOVERNMENT SUPPORT
Asia is one of the fastest growing regions globally when it comes to healthcare spending, up 8% in the past year, according to Frost & Sullivan, which is almost double the global average. Governments in this region are under pressure to cater to ageing populations and meet a growing demand for specialty pharmaceuticals. Georg thinks it is this pressure that is shifting the way local governments in Asia view clinical trials. He notes that, “Clinical trials have become a cost-effective way for governments to try and meet some of the healthcare needs of their citizens. China, for example, recently reformed its policies to make conducting trials in the country more attractive to CROs, shortening regulatory review timeframes and improving clinical trial site availability. This is a trend that we are seeing across Asia, with governments becoming more and more supportive of clinical trials conducted locally.”

While the benefits are great, Asia comes with its own set of unique challenges, from local language translation to navigating extreme traffic congestion without compromising product integrity. Georg comments that “Asia is a market rich with opportunity for those with the experience to navigate its cultural and geographical challenges. Our clients are seeing massive growth and savings in comparison to Western countries, but operating in this market still needs to be handled with care.”

Maximising the potential of clinical trials in Asia
Zuellig Pharma Speciality Solutions Group (ZPSSG) operates one of the largest and most comprehensive clinical trial support networks in Asia, spanning 15 countries. Having supported more than 1,800 clinical trials, we have drawn on our network and infrastructure in Asia to help clients bring new healthcare innovations to market quickly and cost-effectively.

The Clinical Reach team offers centralised solutions to sponsors, CROs and manufacturing organisations that can support at any phase of a clinical trial. From supply management, patient recruitment and negotiating with suppliers to navigating regulations and compliance issues, to get your product market-ready in the shortest timeframe.

For more information or enquiries about Zuellig Pharma Speciality Solutions Group’s Clinical Reach offering, please email Georg Schulz, General Manager Clinical Reach at GSchulz@zuelligpharma.com.
The phrase ‘Big Data’ started as a way to describe data of such huge volumes and complexity that regular data processing systems are not able to handle. These days, it is largely used in reference to the vast insights that could be mined from data that is collected through day-to-day activities.

“Unstructured data forms about 80% of information in the healthcare industry,” shares Tristan Tan, Head of Analytics at Zuellig Pharma. “Our goal over the last few years has been to harness this data as an invaluable resource. Since then we have architected the design of internal data platforms to harness Big Data, and have developed an advanced data system that not only helps our company accelerate business processes and deliver real-time insights, but ultimately helps our clients improve patients’ lives.”
A little over two years ago, we started an internal business intelligence platform that harnesses Big Data to transform the way we do business. By automating the data-collection process, and converting data into real-time insights, we have sped up internal reporting and in-depth business reviews with clients.

The healthcare sector generates huge volumes of data daily, but they are often wasted due to ineffective collection and analysis. That’s a huge loss of potential to pinpoint and develop targeted strategies. We sought to overcome this by implementing new digital platforms which not only capture vast amounts of data, but can be used to create tailored insights to drive performance both internally and with our clients.

As Asia’s largest healthcare services group, one of our key strengths is our expansive network of warehouses and logistic functions. The work we have done in this area has unlocked an unprecedented flow of datasets within this network.

Employees are now equipped with real-time access to issue-critical data, wherever they are. For instance, teams can now predict delays and potential pain-points on the operational front, and respond immediately to fix any warehouse issues. Easier access to key statistics from each warehouse provides us with a live overview of operations, which facilitates the tracking of picking packages and managing of inventories, allowing us to better plan, forecast and check on stock statuses.

In the past, getting reports and insights was labour intensive and time-consuming. Now, our Business Development teams can easily obtain direct access to this key information. “You don’t have to be an IT or a data guy to get the data and understand what it’s saying. It’s as easy as calling an Uber,” explained Tristan.

Because of this, we can now provide real-time information on product portfolios and performance with clients, sharing an unparalleled level of insights that will enable us to identify and leverage market opportunities as they emerge.

We have started helping our clients get better access to information that matters through our proprietary range of TradeIntelligence tools. This data analytics suite exists to provide insight into our client’s operations, competition, customers and consumers. We are now able to source, prepare and analyse data – and even enhance insights through predictive analytics.

“We have seen how analytics has provided us with knowledge to help clients gain insights into ways to decrease the length of hospital stays and improve cost effective prescription. Ultimately, we hope that by harnessing Big Data, we can partner with our clients to deliver the best treatment outcomes for patients,” added Tristan.
Playing a role in healthcare reform for developing countries

In the past decade, Myanmar and Cambodia have seen immense GDP growth and corresponding increases in healthcare expenditure per capita, ushering in a new era for healthcare policy-making that brings a renewed focus to improving accessibility.

Substantial government reforms in recent years have been driving economic development, geared at improving the standard of living in both countries. In Myanmar, the government recently introduced its National Health Plan to improve its citizens’ access to healthcare services and lower personal spending. Similarly, the Cambodian government has made significant advances in this area with new policies and funding which have helped more than 8 million people get access to basic health, nutrition and reproductive health services.

Yves Hermes, Area Director Southeast Asia, has been actively involved in establishing our presence in Myanmar since 2015 and in Cambodia since 2001. He shares “The rapid growth in both Cambodia and Myanmar presents big opportunities for both healthcare ecosystems, and there is clear potential for further development.” Since then, we have been working closely with governments and regulators, sharing our expertise in healthcare and experience working in other emerging markets, to introduce solutions that promote affordability and accessibility.
Introducing cold chain solutions

In Myanmar, financial aid from the government while increasing, is still insufficient to meet the demand for quality healthcare, as is the pool of skilled healthcare professionals to cater to patients in hospitals. The underdeveloped healthcare infrastructure means that hospital and clinics, particularly in rural areas, have basic or no cold chain facilities.

We have started to introduce our proprietary packaging solution – the eZCooler to ensure the integrity of temperature-sensitive products from our warehouses to our customers. Using a unique thermal isolation system, eZCooler is able to retain the specific temperature of a product for up to five days, a crucial feature for distribution to remote regions.

In the remote areas of Cambodia, we have also set up a support network with local businesses. In the event that any of our trucks suffer an engine failure, our drivers will be able to obtain access to electricity from our local support partners within a 30km/30-minute radius to ensure the continuity of our cold chain operations.

Partnering with regulators

Cambodia grapples with parallel imports particularly in the pharmaceutical industry. “Very often, drugs and medicine brought into the country by third-party importers are not maintained in the right conditions, making them unsuitable and unsafe for patient consumption,” shared Jean-Gaetan Guillemaud, GM for Zuellig Pharma in Cambodia.

Beyond parallel imports, Cambodia is also seeing a high incidence of counterfeit pharmaceuticals. Since 2017, Jean-gaetan was elected Vice-Chairman of the Cambodia Healthcare committee, where he has partnered with the Cambodia Counterfeit Committee and the EU Ambassador on initiatives to cope with both parallel and counterfeit imports.

The WHO estimates that the needs-based shortage of health-care workers globally would be about 17.4 million

Growing the Talent Pool

Based on a threshold of 4.45 skilled health professionals per 1000 population, the WHO estimates that the needs-based shortage of health-care workers globally would be about 17.4 million, of which almost 2.6 million are doctors and over 9 million are nurses and midwives. The largest needs-based shortages are in Southeast Asia and Africa.

To help address this gap in Myanmar, we have started a scholarship for aspiring nurses together with our partners Pacific-AA — one of the largest healthcare companies in the country. This scholarship will fund four years of university education to support the need for more medical professionals here.

Frederik Meerhoff, GM for Zuellig Pharma Myanmar shared, “Nurses play an important role in helping patients manage and understand their diseases by being the key conduit between the doctor and the patient. The scholarship will not only support the education of local nurses, it also aims to educate people on the importance of the nursing profession.”

While healthcare infrastructure in Myanmar and Cambodia have some ways to go, it is exciting to be part of the progress that has been made in just a few short years. Having established our presence in Asia since 1922, we are familiar with the healthcare demands and challenges that come with burgeoning countries. As we continue to partner with businesses that we have long-standing relationships with, we are excited to forge new partnerships with businesses and governments to improve access to healthcare in developing Asia.