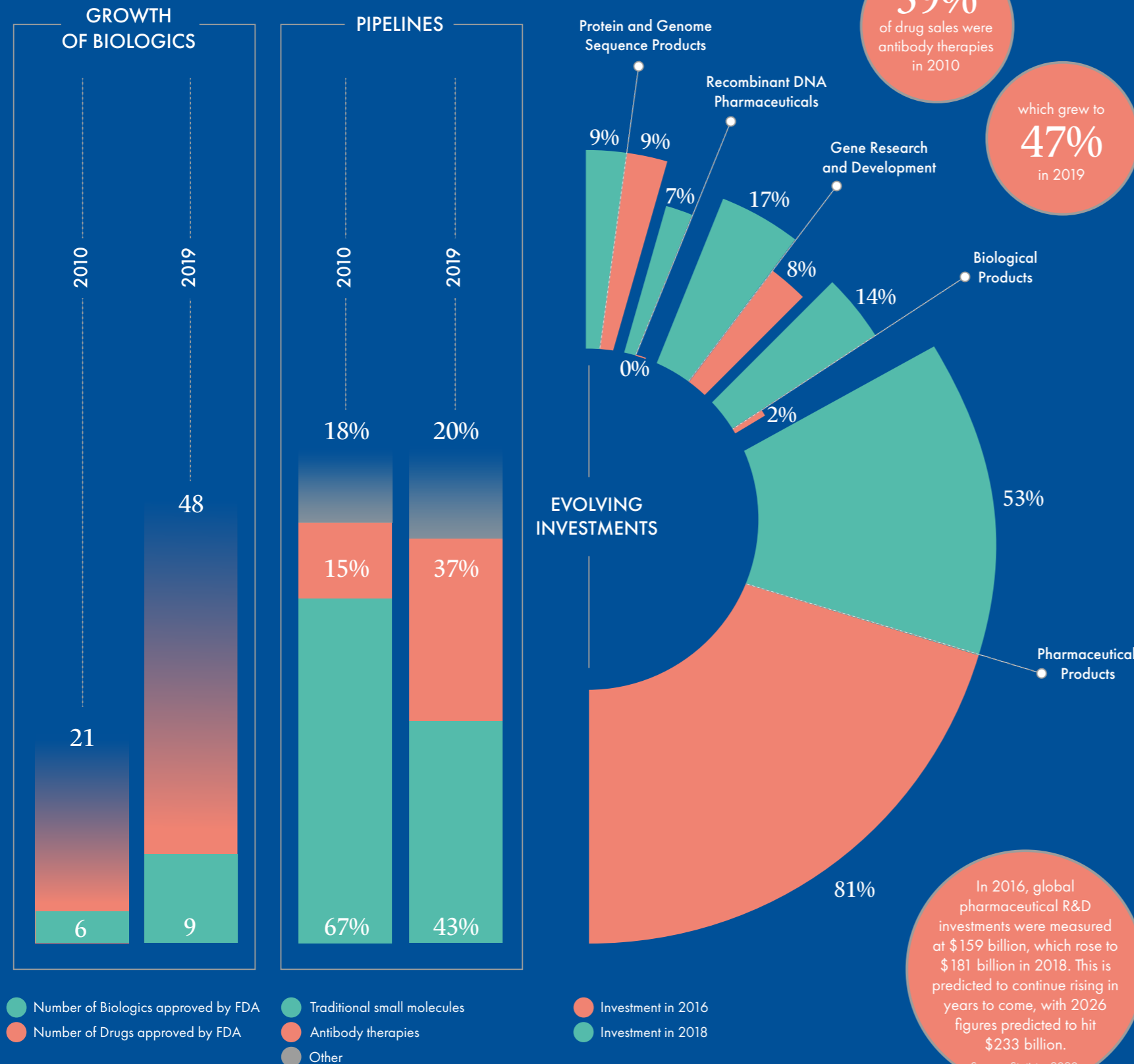


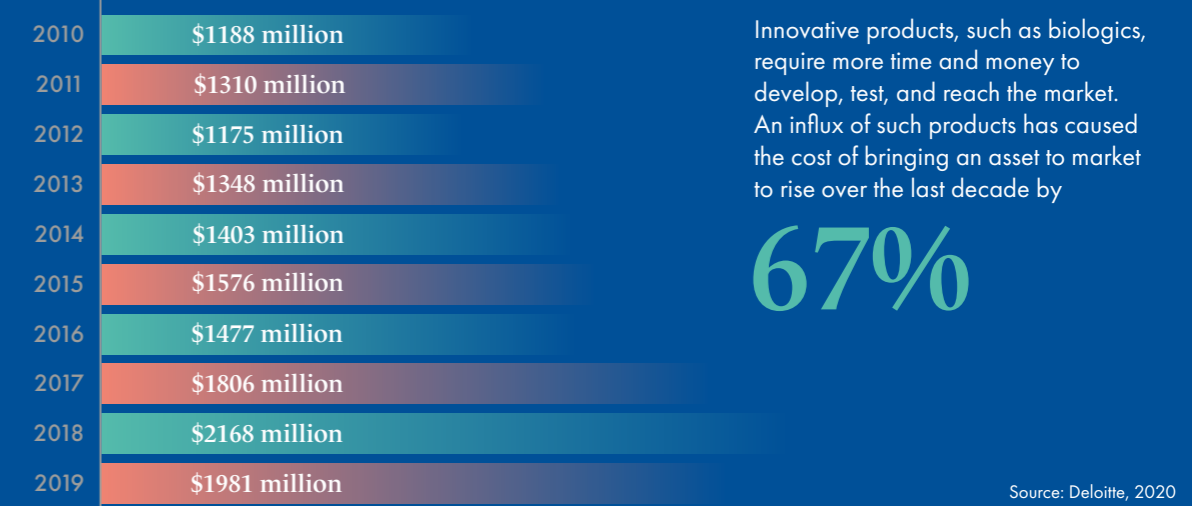
# A DECADE OF INNOVATION

Over the past decade, innovative products have changed the landscape of the pharmaceutical industry. In this infographic, we highlight some of the biggest shifts, with increased investment and development of biologics, recombinant DNA, and gene research. We also explore the impact on resources; bringing biologics to market is more expensive, takes longer, and serves a smaller population of patients, lowering the opportunity for revenue. Looking forward, we showcase future innovation opportunities within the industry.

## INNOVATION AND THE CHANGING LANDSCAPE



## GROWING COST: BRINGING A PRODUCT TO MARKET



## THE FUTURE OF BIOPHARMA INNOVATION

- Shift to small molecule research – accommodate emerging modalities to remain competitive
  - Expedite pace of scientific breakthroughs – insight from interoperable data
  - Move away from tradition – dataset-driven processes, intelligent computing, and cloud storage
  - Advance analytics – end-to-end automation of R&D
- Source: Deloitte, 2020

## SOURCES OF INNOVATION

Mergers, acquisitions, and co-development are all being increasingly relied upon for innovation in large cap biopharma.

In 2019...

