

# Industry Dynamics: 2010 Guide to the Asia-Pacific Life Sciences Industry

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## Abstracts

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### Introduction

Pharmaceutical companies are expanding into the Asia-Pacific region to increase their market share and reduce costs. The life sciences industry is difficult enough for technology vendors to enter, but add to it the complexity of emerging markets, and the process can be downright overwhelming. Ovum provides an introduction to the life sciences in APAC in order for vendors to penetrate the market.

### Features and benefits

Offers an overview of the pharmaceutical and biotechnology sectors in Australia, China, India, and Japan

Discusses key areas where there is greatest need for technology in the APAC life sciences industry

Provides go-to-market strategies to help vendors enter the APAC pharma and biotech markets and realize successful

### Highlights

Before attempting to penetrate the APAC pharma market, it is important to understand the complexity of the global life sciences industry. Once vendors understand the

industry as a whole, they will better comprehend the dynamics of the APAC markets and how the developed and emerging pharma industries fit into their customers' global strategies. The Asia-Pacific life sciences industry varies greatly, comprised of both developed and emerging markets. It is also home to small, emerging biotech companies with up to ten employees as well as Big Pharma with thousands of employees. As wide as the spectrum is for size and type of life sciences company, so is the need for IT solutions. The emerging markets have seen tremendous growth, and this trend will likely continue, but not without the help of key IT solutions. The APAC pharma and biotech sectors are much more open to the use of IT than their Western counterparts, but it is still important for technology vendors to understand where and how to best realize success.

### **Your key questions answered**

Understand the pharmaceutical and biotechnology product lifecycle and business processes

Identify emerging areas of concern for pharmaceutical and biotechnology companies, particularly in Australia, China, India and Japan

Gain insight into what solutions and services will appeal most to APAC life sciences companies

## Contents

### SUMMARY

Catalyst

Ovum view

Key messages

Understand the complexity of the global life sciences industry before attempting to penetrate the APAC pharma market

The Asia-Pacific life sciences industry varies greatly and comprises both developed and emerging markets

IT will have an immense impact on the growth of the Asia-Pacific pharma industry

### UNDERSTANDING THE PHARMA PROCESS

About the industry

The drug discovery and development process is long and expensive

Discovery and pre-clinical research

Clinical research

Manufacturing

Sales and marketing

The biggest challenge facing the pharma industry is the successful navigation of the 2011 patent cliff

### THE APAC LIFE SCIENCES MARKET

Overview of APAC markets

Australia's pharmaceutical market

China's pharmaceutical market

Hong Kong operates separately from mainland China

India's pharmaceutical market

Japan's pharmaceutical market

Slowing growth in major developed markets drives pharma M&A in APAC

Trends within countries based on the process areas

Discovery and pre-clinical research

Clinical trials

Manufacturing

Sales and marketing

## **OPPORTUNITIES FOR TECHNOLOGY VENDORS**

How best to capitalize

The pharma product lifecycle plays a crucial role in IT strategy

APAC's developed markets have a more short-term view on research-enabling IT investment than their emerging counterparts

To reduce the most expensive aspect of drug development, pharma companies are investing in e-clinical technologies

APAC and drug manufacturing: one cannot be mentioned without the other

The patent cliff has a big impact on the APAC sales and marketing landscape

The majority of a life sciences company's IT budget is allocated to a few core solutions

IT engagement with pharma comes with its own set of dynamics

The lifecycle approach to technology is important, but don't forget the stack

APAC pharma companies will spend more on hardware and software than their global peers

Cloud computing is seen as a way to scale quickly

The CIO is still king, but be wary of the CFO

With no two life sciences markets exactly the same, neither is their IT investment

Big Pharma has the greatest impact on Australia's pharma IT sector, but smaller companies need to be heard as well

The greatest short-term and long-term opportunities reside in China

As the Indian market moves towards new drug R&D, investment in IT will grow

High-tech Japan will continue to invest in IT, but growth will be limited

## **RECOMMENDATIONS FOR TECHNOLOGY VENDORS**

The right solutions for the right processes

Position technology along the pharma lifecycle

Know the pharma company's product pipeline and drug portfolio

Route to market will be a critical success factor

Keep in mind that IT budget allocation does not equal priority

Focus on IT solutions that enable the shift towards biotech research

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Definitions

Further reading

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Ovum authors

Datamonitor author  
Ovum Consulting  
Disclaimer

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