

Healthcare Innovation & Logistic Implications

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Key Trends that Impact Pharma and Healthcare



Aging & Disease

- Increase of elderly population
- Increase of chronic diseases
- Increased burden on health system



Personalization

- Need to fit medications and treatment to specific patient profiles (genetic, other)



Convenience/Adherence

- Consumerism
- Looking for convenience & quality of life
- Need to ensure ease of use and adherence



Digitization & Technology

- The digitization revolution & new technologies that support better availability and sophistication of treatments

Impact on Product, Offering, Channels, Supply-chain & Services

Illustration 1: e-Commerce and Home Delivery (Channels)

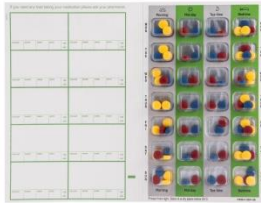


New channels to access and market to end-consumers (leverage digitization, addressing convenience/adherence)

New challenges in handling D2C logistics and last mile complexity



Illustration 2: Personalized Packs (Product)

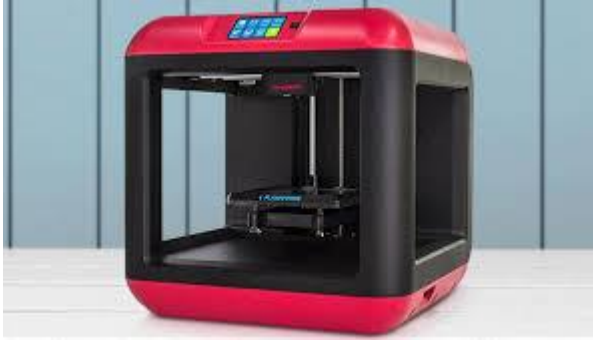


New formats to introduce the product, enhancing ease of use and adherence...

...also requiring new production capabilities ...



Illustration 3: Value Chain Disruptions



- Home 3D printing devices, to print personalized medications (dose, combinations, quantities)
- Totally different value-chain – of cartridges, devices, computers, ...

- Implantable chips that periodically release all required medication-levels throughout the year
- Controlled by smartphones and apps
- Security/safety challenges

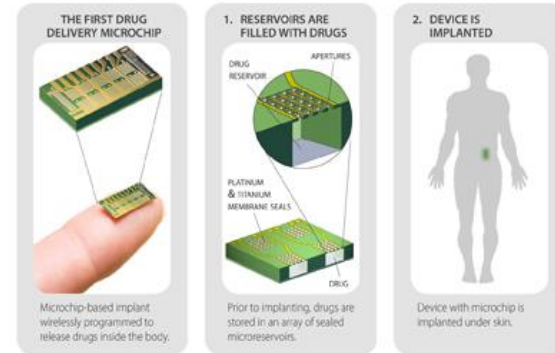


Illustration 4: Integrated Services – Virtual Hospitals



Providing integrated services to address all patient needs from the comfort of home:

- Medications
- Diagnostics and lab tests
- Medical support via digital channels
- Sensors and monitoring

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Thank You.

