

EMPLOYMENT PROSPECTS FOR GRADUATES OF PHARMACEUTICAL SCIENCES FACULTY



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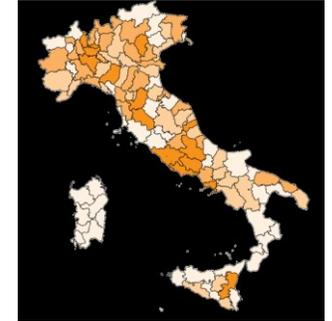
Aula C03 - Via Luigi Mangiagalli, 25– Milan

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Italian Pharma Companies

Geographical presence

- Pharmaceutical companies in Italy are widespread in the North, Centre and South and generate quality employment
- The employment prospects for the next few years are deeply linked to the trends of innovation, that he's going through a phase of real Renaissance



The pharmaceutical industry is a strategic asset of the Italian economy

- **65,000 employees** in Italy in 2017, 90% graduates and graduates, 42% women, from 2013 3,000 more employees especially in production and research, thanks to more than **6,000 hires per year**, half of which are young people
- **32 billion euro** value of pharmaceutical production in Italy in 2017. **The first largest producer country in the EU**, also thanks to the quality of the suppliers
- **+77% growth** in exports from 2010 to 2017, the highest of all the large European countries (+42% on average)

Social Impact

- 2 out of 3 people diagnosed with cancer survive after **5 years**, 30 years ago they did not reach 1 (83% of this progress is due to new drugs)
- **HIV** has become a chronic disease with a life expectancy of **70 years**
- **Hepatitis C is treatable**
- Mortality from cardiovascular disease has fallen by 30% in 10 years
- In Italy, healthy over 65s have gone from 18% to **29%** of the total in 10 years (1.8 million more people)

R&D actual & future trends

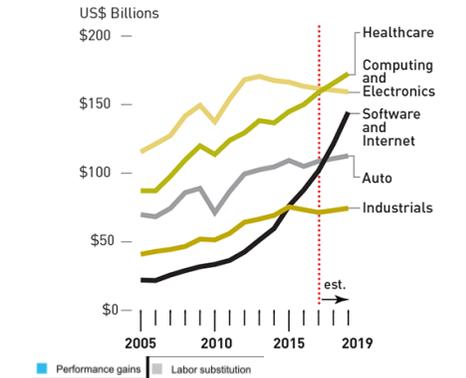
Historical record of products under development

- **80% of R&D carried out externally by companies**, in partnership with SMEs, centres of excellence, non-profit organisations, clinical structures, NHS bodies (15 years ago it was 20%)
- **7.227** products in clinical phase, **8.040** in preclinical phase in **2018**



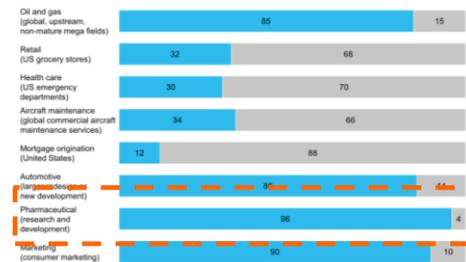
Health is the world's largest investment: \$1 trillion over 5 years

- Health is the only area where **EU research as a percentage of total research (28%)** is higher than that of world GDP (26%),
- **282** biotech drugs under development in Italy, one of the specializations of our country along with vaccines, blood products, orphan drugs
- **700 M € Italian annual** investments in clinical studies, for which Italy represents 20% of the total in Europe (compared to 18% in 2012)



Future trends

- New skills needed in the new context to integrate different disciplines, technologies and fields of application
- According to a recent McKinsey study in the pharmaceutical industry, new technologies have **the highest ratio** of productivity growth and job replacement



My professional history



- 1999**
- Degree in CTF
 - Scholarship to the Health Economics Centre

- 2004-2010**
- Business Development Manager
 - BD, OTC & Market Access Director

- 2015-2016**
- Management Buy In deal with Italian Private Equity funds
 - CEO & shareholder

- 2018-**
- Board Member
 - Leveraged buyout >1B deal with international PE funds
 - CEO from July 1st



- 2000**
- Sales Rep
 - Product Manager anti-inflammatory line

- 2001-2004**
- International Marketing Manager
 - Business Development Manager Italy

- 2010-2015**
- CHC BU head Italy
 - BD, M&A Director CHC Europe

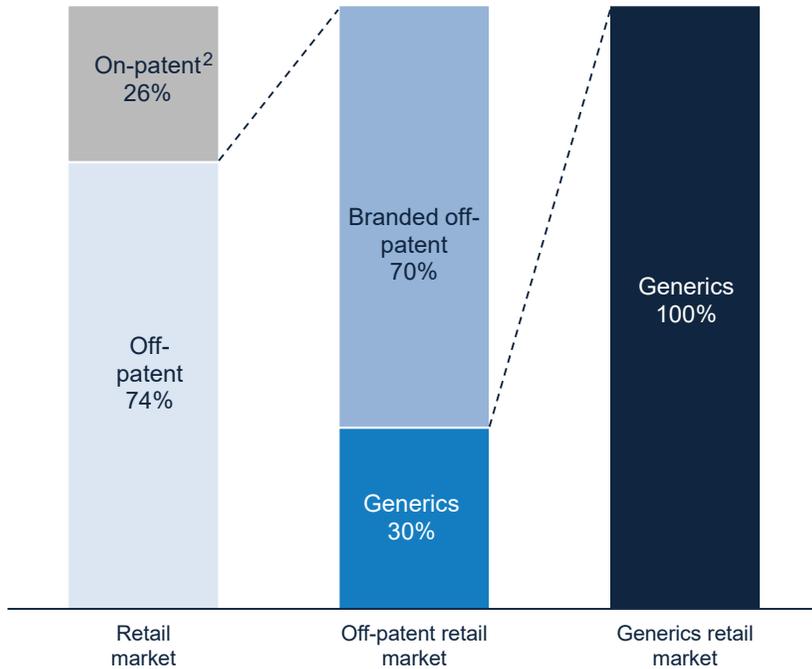
- 2016-2017**
- CEO



Legend
■ Italy
■ International

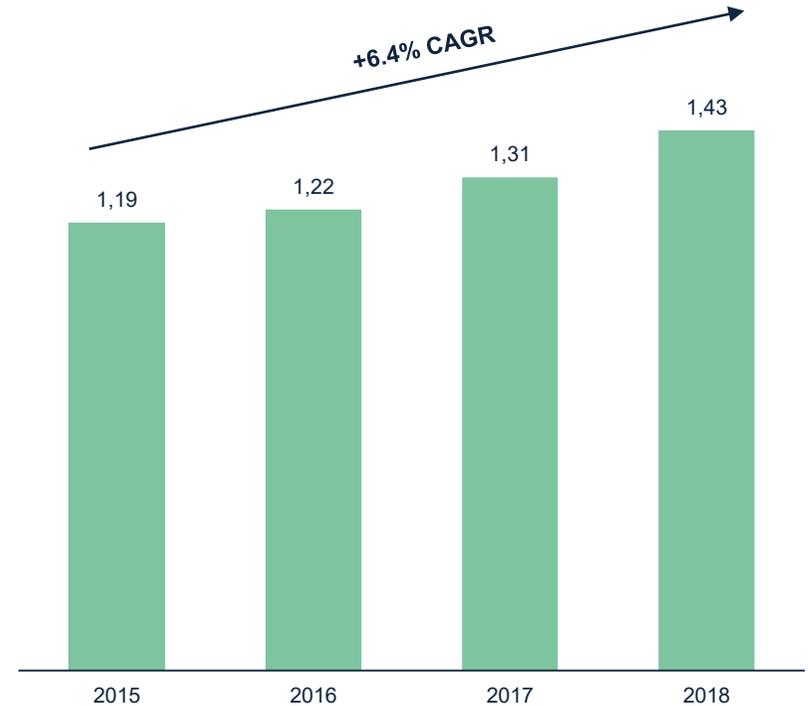
Italian generics retail market

Italian retail market¹ by volume (2018)



- The Italian retail market includes both off-patent (70%+) and on-patent (<30%) segments
- Italian generics retail market accounts for c. 30% of the off-patent retail market, or c. 22% of the overall retail market

Italian generics retail market¹ evolution by value (€bn, 2015 – 2018)



- Italian generics retail market experienced a solid growth posting a 6.4% CAGR across 2015-2018 and reaching €1.4bn, as a result of patent cliffs over the period and increasing penetration

Notes: (1) Retail markets includes both Class A, Class C and OTC drugs; (2) Including off-patent drugs for which there is no generic competition
 Source: Assogenerici, IQVIA (retail market)

Italian generics retail market

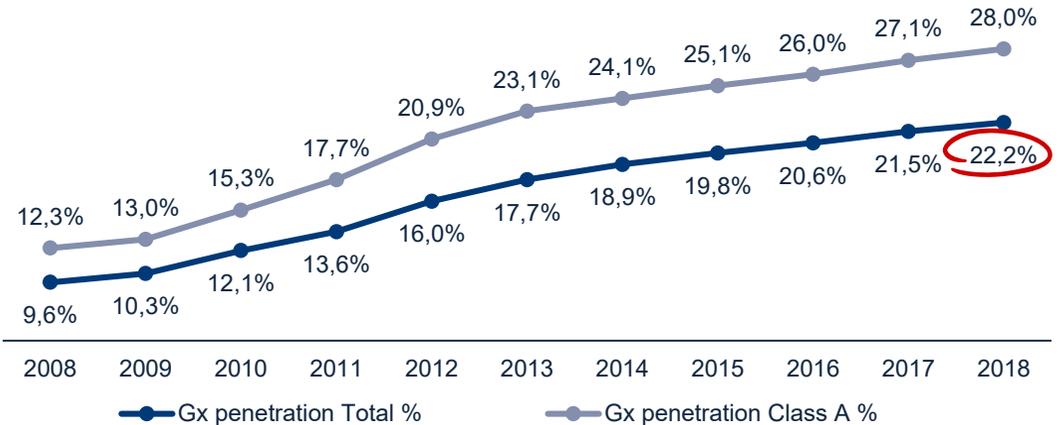
Increasing generics penetration...

- Generics penetration in Italy has increased throughout the years, driven by increased awareness (over 90%) and supportive regulatory environment, taking share from branded off patents
- Generics penetration for Class A products (DOC key reference market) reached c. 28%.** Penetration for chronic diseases sub-segment even higher

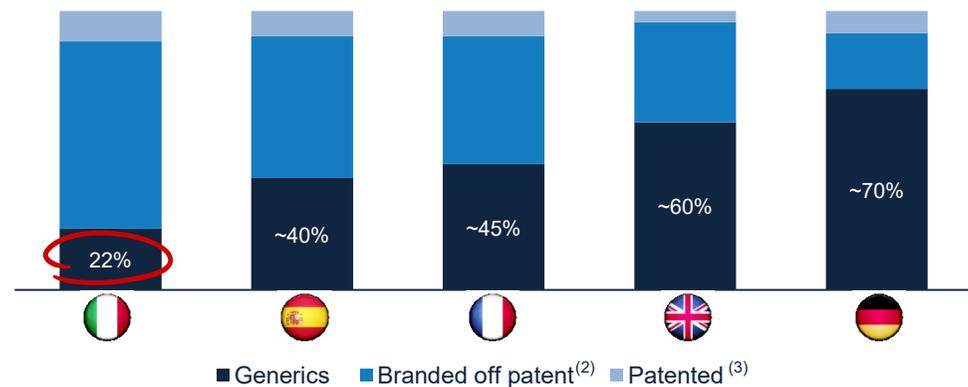
... with further headroom to grow

- Generics penetration in Italy is still lagging behind other key European countries, with large headroom to catch up and grow

Historical generics penetration in the retail market¹ by volume (2008 – 2018)



Generics penetration in the retail market¹ in EU5 countries by volume (2018)



Notes: (1) Retail markets includes both Class A, Class C and OTC drugs; (2) Including off-patent drugs for which there is no generic competition; (3) Including on-patent drugs only
Source: IQVIA (retail market), Independent Third Party Report

Final Considerations

The Italian Pharmaceutical industry is a good place to grow professionally

- In 2019, the pharmaceutical sector is the second largest contributor to GDP growth.
- 55% of workers are under 35 (Vs .an Italian average of 20%)
- Pharma is second best paid sector in Italy, with an average gross salary of 40,000 €

final recommendations

- In a changing world, the success factor is the ability to adapt and "**learn to learn**".
- **A good technical competence is key**, economic and managerial skills can be learned and improved along the work experience
- **Be open to international experience as from University Studies**

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