



European Pharma in Chicago

January 18, 2012





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Moderator: **Michael Rosen**



Panel:

- **David Bowman**



- **Anders Burr**



- **John Moore**



The Global Pharma Market (IMS -2010)

REGION	SALES – 2010 (B)	% Growth	% Share
WORLD TOTAL	\$874.6	4.1%	100%
North America	\$335.1	1.9%	38.3%
Europe	\$253.2	2.4%	29.0%
Asia/Africa/Australia*	\$129.7	14.0%	14.8%
Japan	\$102.3	0.1%	11.7%
Latin America	\$54.3	14.2%	6.2%



* Includes China and India



U.S. Market Dynamics

- FDA approved 35 new drugs in 2011 (vs. 21 in 2010)
- Healthcare Reform will bring in 25-30 million new patients over next 5 years
- Still largest single market
- High growth in key disease areas with unmet needs:
 - Cancer
 - Neuroscience (Alzheimers, Parkinsons, Depression, Bipolar, MS)
 - Obesity/Diabetes
 - New Viruses



WHY CHICAGO?

- \$496 billion economy
- >1,500 foreign-based companies
- \$40 billion in Foreign Direct Investment (FDI)
- 79 Consulates
- 90 foreign-based trade associations
- 40 international chambers of commerce
- 28 international sister cities

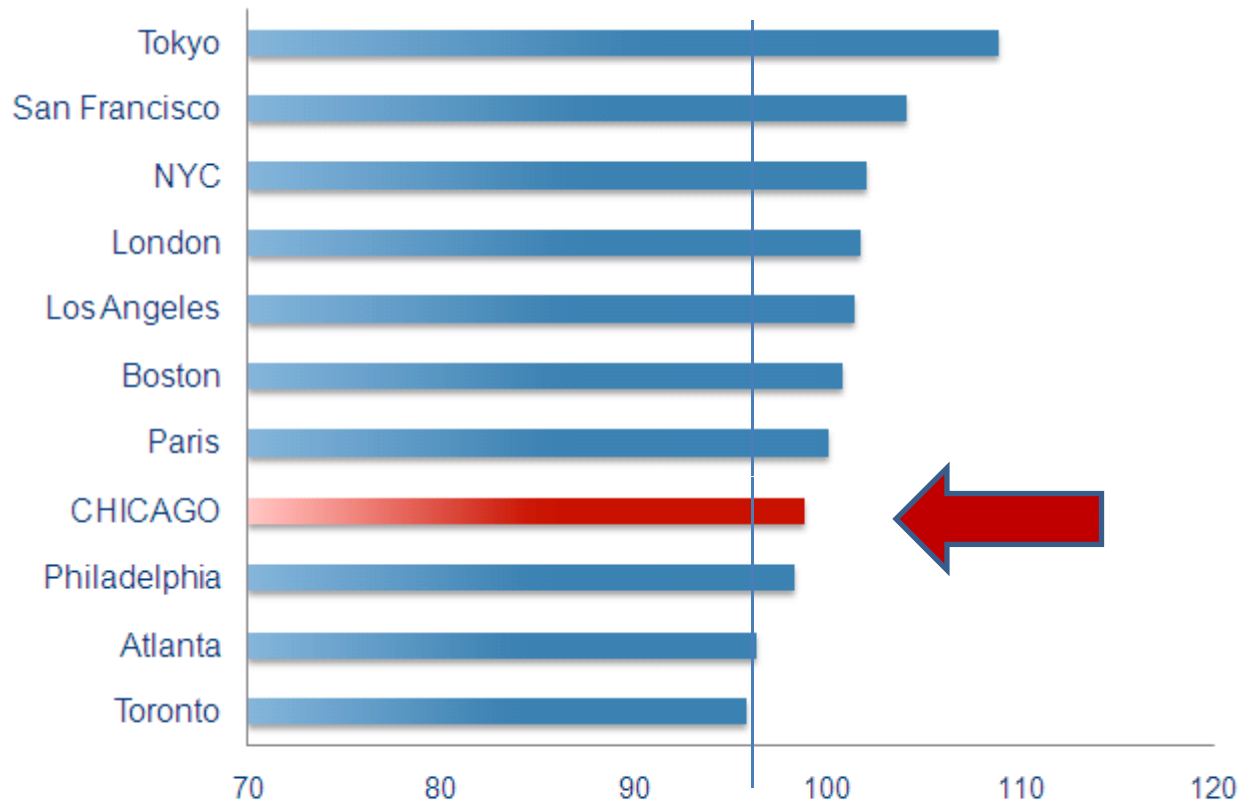


WHY CHICAGO?

- 2nd largest pharma hub in U.S.
 - Large skilled labor talent pool
- 6 medical schools
- One of largest concentration of physicians
- \$733 million in NIH funding (8th in the U.S.)
- IBIO and state biotech advocacy
- BIO International Convention: 2013 & 2016



Business Costs



Source: KPMG Guide to Competitive Business Alternatives, 2009





Source: Official Airline Guide, March 2011.



ACCESS
2,900 Daily Flights to more than 200 cities worldwide





Source: Official Airline Guide, March 2011.





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