



CPHI Milan Wrap-Up Report:

Key Insights from the Heart of Pharma



35 years at the heart of Pharma



Celebrating its 35th edition, CPHI Milan was held 8–10 October, 2024 at the historic Fiera Milano exhibition centre. Bringing together over 60,000 attendees worldwide, 2,400 exhibiting companies and 150 international expert speakers, CPHI Milan connected the global pharmaceutical supply chain for 3 days of innovation and thought leadership.

CPHI Online are proud to bring you the first edition of the CPHI Wrap-Up Report, featuring key insights from CPHI Milan and the wider pharmaceutical industry. Exclusive content from the show floor, conference theatres, and exhibiting hubs showcase the power of in-person connection and collaboration.

This report also features exclusive interviews with expert speakers from such companies as Polpharma, Daiichi Sankyo, Moderna, the European Commission, Novartis, and many more.

Whether you're looking to relive the CPHI experience, or catch up on all the buzz you missed at the event, this report is your exclusive ticket to all key findings at CPHI Milan.

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Editor's Note





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We on the CPHI Content Team are delighted to bring you our first ever CPHI Post-Show Report, a testament to the hard work and dedication of the entire CPHI team in bringing the 35th edition of the show to Milan.

2024 has brought many opportunities and challenges to the pharmaceutical industry throughout the year. As we observe the continued progression of therapeutic areas such as weight-loss and diabetes treatments, oncology drugs, and vaccines, we are also witnessing potential hurdles in global manufacturing as well as new opportunities in regional markets [1]. Whatever the challenges, we understand that bringing the pharmaceutical community together and collaborating across borders forms a key component of success for innovation in pharma, a value we have infused into each of our CPHI shows around the world.

Sustainability and diversity continue to be overarching themes for all our CPHI shows. We are delighted to highlight these important topics in all our conference sessions, as well as throughout the event itself.

This year we hosted a dedicated sustainability theatre, the Sustainable Futures track, to act as a home to all of our sustainability content at CPHI Milan. The topic of sustainability has been a consistently important feature of our onsite content over the past few years, and it seemed only right to give even more of a platform for this field, as one of the most urgent and pressing issues facing the pharmaceutical industry and global health today.

The theme of sustainability doesn't just fit into our agenda, it's part of the very fabric of the show, very literally when it comes to the exhibition stands. Our [**Better Stands Programme**](#) encourages the use of sustainable stands, stands that are made out of recycled and reuseable materials, which are built with the idea of using them year on year. The conference also encourages waste reduction where possible, reuseable bottles, less printed materials, more digital signage, and collection of food waste.

To further address the importance of diversity, equity, and



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inclusion, the CPHI Pharma Awards have added two new categories to the roster. The *'Woman of the Year'* award and the *Future Leader* award recognise the contributions and innovations of a diverse group of individuals in the pharmaceutical industry, and we at CPHI are proud to celebrate their achievements with all [2].

At CPHI, we are dedicated to connecting professionals throughout the pharmaceutical supply chain, both at our events and throughout the year with our digital marketing offerings. We are proud to have published

four Trend Reports this last year, with two more coming up: the CPHI Middle East Biotech Report and our annual Pharma Trends Outlook for 2025. As we continue to grow and meet the needs of the B2B pharmaceutical sector, we hope that this CPHI Milan Post-Show Report will enable all to understand the biggest trends and conversations happening throughout the pharmaceutical industry today.

Thank you to all who organised, attended, exhibited, or sponsored!



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CPHI Awards and CPHI Celebration 2024





CPHI Awards and CPHI Celebration 2024

This year, the CPHI Milan Pharma Awards were excited to present the Woman of the Year award and the Future Leader award to foster a culture of inclusion and recognise different perspectives on challenges faced by the pharmaceutical industry. The awards were presented to the winners at the CPHI Milan Pharma Awards on October 8, 2024.

Additionally, we were excited to introduce a new element to our flagship CPHI event - CPHI Celebration is our newest take on the annual Pharma Awards and Networking Party! CPHI events are built around connections forged between colleagues, partners, and peers from across the globe. CPHI Celebration highlighted the importance of these connections with an exclusive evening of top-level networking, drinks, and canapes against a backdrop of innovation. With a curated guest list of exhibitors and VIPs, we celebrated the 2024 CPHI Pharma Awards winners and network with the leading voices and brightest minds in our industry!





Woman of the Year

This award aims to recognise the women leaders in pharma who inspire and uplift their peers and colleagues with a commitment to diversity, equity, and inclusion. Criteria for the award are Leadership & Collaboration, Advancement, Inspiration, and Contribution to the Wider Industry. These four criteria form the foundation from which deserving groups or individuals will be recognised and celebrated for their work.

Through this new category, CPHI aims to recognise exemplary leaders who not only pave the way for progression, but also platforming the voices of others through their leadership. Initiatives and projects that promote and empower underrepresented communities will be highlighted. Groups or individuals who exemplify the facilitation of opportunities for women in the industry are what this award hopes to recognise and endorse as role models within both their field and the wider pharmaceutical industry. Whether through mentorship, volunteering, employee initiatives, or leadership and coaching, these role models will have contributed to the diversification of the pharmaceutical industry.



“Over the past year, across all major industries – film, television, music, health, automotive to name a few – women are showing that they continue to be a force to reckon with! With the number of women executives in pharma expected to reach 40% by 2027 (as noted by PharmExec.com), THIS is why CPHI Women is such an important recognition to celebrate the women in pharma and biotech companies securing a seat at the table.”

Demetria Johnson, CDP, D&I Early in Career Partner, Americas, Genentech



By recognising the outstanding work of all applicants and nominees, CPHI hopes to further the conversation on diversity and inclusion in the pharmaceutical industry. Education, recognition, and collaboration is what makes this award a tenant of CPHI's core principles.

“There is a huge room for more (gender) diversity in pharma and biopharma – particularly in leadership roles. Therefore, we need more female role models, and we need to make them more visible. You can't be what you can't see.”

Thomas Kern, Managing Partner, Vinc – Life Sciences Strategic Transaction Advisory, CPHI Milan Award Juror

“Recognising the CPHI Women of the Year isn't just about celebrating individual achievements – it's about honouring the resilience, ingenuity, and impact of global women across diverse pharma fields and backgrounds. This award symbolises our collective commitment to gender equality and empowerment, showcasing the vital contributions of women to society and inspiring future generations to break barriers and pursue their dreams.”

Sanobar Syed, Business Strategy and Commercial Expert, CPHI Milan Award Juror

Congratulations to Julia Tsetis of OFET Pharmaceutical Group!

CEO of the OFET Pharmaceutical Group, Tsetis was nominated as a truly visionary woman, and someone who leaves “an indelible mark on the global healthcare landscape”. Tsetis demonstrates a passionate commitment to the wider pharmaceutical and healthcare industry, through several ventures including United Nations High Commissioner for Refugees, and winning awards for corporate social responsibility and for sustainability.

Future Leader

Age may be just a number but with new generations of pharmaceutical professionals comes new ideas and perspectives. The Future Leader award aims to recognise the rising stars in the pharmaceutical industry who are bringing fresh approaches to the wider industry. Criteria for this award include Leadership & Collaboration, Personal Brand, Recognition, and Industry Involvement.

Each nominee will have an outstanding record as an emerging talent or leader, whether they inspire their colleagues with additional roles and responsibilities



or if they already manage their own teams. New ways of thinking and doing things is a vital part of being a Future Leader. The award winner will be a role model in innovation and original initiatives. Additionally, the CPHI Future Leader will be an exemplary contributor to their community in thought leadership roles and furthering industry knowledge.

They will be committed to developing the broader pharmaceutical industry, participating essential conversations pertinent to all colleagues and partners.

Granting these rising stars a platform to showcase their work and talents is a key part of CPHI's ethos in uplifting different voices in the pharmaceutical community. The CPHI Milan Future Leader Award hopes to honour those bringing a fresh approach to the industry.

Whether you are a leader in your field or wish to nominate someone deserving of recognition, the CPHI Pharma Awards are designed to give worldwide recognition and global exposure to those enabling purposeful change and innovation within our industry.

“The CPHI Awards bring talent and solutions together, all with the hope to build a healthier and more sustainable future for us all. I am immensely excited to get a small glimpse of the trailblazers paving the way for pharmaceuticals!”

Anita Vasilevska, Technical Marketing Manager, IMCD, CPHI Milan Award Juror

Congratulations to Dr Megan Smyth of Almac Sciences!

Senior Team Leader Smyth drives the company's flow chemistry platform, everything from business development to marketing strategies to high technical knowledge and skills. Smyth is also an inspiring role model for young scientists.



The winners of the 2024 CPHI Pharma Awards are...

API Development and Innovation

The winner in this category is **Lonza**, for their *Lonza AI-Enabled Route Scouting Service*. The technology uses commercial data and computer-aided synthesis planning technology to assist partners in developing synthetic pathways to drug candidates, and build more resilient and faster R&D startup times.

CEO of the Year

The winner here is **Guy Clark – CEO of CNX Therapeutics**. Clark became CEO in January 2022, since then the company has grown under his leadership. The company has increased in revenue, country expansion, employees, and new focuses including wellness and sustainability within the company.

Drug Delivery and Device Innovation

Adare Pharma Solutions have created a sprinkle-formulated drug product, to use in the treatment of



tremors and other persistent and uncontrollable body movements. The sprinkle formulation enables flexible administration, meaning it is much easier for patients to consume. The product keeps the patient and the caregiver at the forefront of the design.

Finished Formulation

The *UniLayer Straw Delivery System* from **Unistraw Corp.** gains the award for Finished Formulation. The UniLayer



Straw Delivery System 2mg Loperamide HCl straw is designed to assist with compliance for people of all ages. The medication is dose-controlled through the quantity of water consumed to avoid misuse. It is also a more sustainable and accessible solution.

Future Leader

Our first winner in the Future Leader category is **Dr Megan Smyth**, Senior Team Leader for **Almac Sciences**. Smyth is a key driver of the company's innovative flow chemistry platform, from business development and strategy, marketing, recruitment as well as high technical capabilities. Smyth also acts as an inspiring role model to young scientists.

Manufacturing Excellence

From **RheaVita** for their continuous freeze-drying system allowing aseptic GMP production. The system allows a shift in lyophilisation manufacturing from batch to continuous, taking the raw materials through to the finished product in an uninterrupted production chain for biopharmaceuticals. It is the world's first continuous freeze-drying GMP system.

Regulatory and Compliance

Prodigy is a suite of applications developed by **ProPharma Group**. Prodigy uses AI and machine learning to automate and streamline various manually intensive activities across regulatory, medical, and clinical operations.

The system has several key features that make it unique, including: AI-Enabled Document Quality Control, Real-Time Clinical Data Visualisation, Regulatory Insights and Approvals. The software will accelerate the development of life-saving therapies from discovery to commercialisation

Packaging and Machinery

Cere®Screen Digital Display Label from **WestRock** is the winner in this category. The labelling system is designed to help clinical trial supply and patients. The digital display label facilitates a secure, remote & real time, capability to update customisable label content.

With multiple pages with a scrolling functionality the label can accommodate all necessary information, as well as being produced in several different languages.



Supply Chain Excellence

QYOBO GmbH wins the award in this category for *The QYOBO platform*. Combining data from over 250 sources into a single platform, QYOBO offers a clear view of pharmaceutical supply chains for more than 2 million drugs in over 40 countries.

The platform enables users to take quick, informed actions by combining supply chain information with global drug shortages and marketing authorisation data, enabling the anticipation of risks and mitigate drug shortages.

Start-Up Initiative

Nebu~Flow Nebuliser, for the Efficient Inhalation Delivery of Biologics, from **Acu-Flow Ltd.** The patented technology is a soft aerosolisation method capable of dispersing high-value RNA formulations, preserving their activity for efficient inhalation therapy.

The technology uses ultrasound waves, giving a unique ability to target the alveolar region of the lungs.

At the Heart of Pharma

Fox Chase Cancer Center and **West Pharmaceutical Services** win for the community-serving award, At the Heart of Pharma. The partnership brings cancer screenings to residents of Pennsylvania via a mobile screening unit (MSU). During the period of 2019–2023, the programme has provided breast cancer screenings to 7,457 women and navigated 285 patients into follow-up care at FCCC. The service provides access to diagnosis and treatment that might otherwise be difficult for certain populations, and keeps the overall health and wellness of the communities at the forefront of what they do.

Sustainability

Evonik Industries AG wins the coveted award for Sustainability this year with their *PhytoSquene*[®] plant-based squalene for parenteral applications. *PhytoSquene*[®] is the world's first GMP-quality, plant-derived squalene. It offers a sustainable and high-quality alternative to traditional shark-derived squalene, meeting the need for sustainably sourced pharmaceutical-grade



squalene. This helps protect life below water. Declining shark populations is linked to the overall decline of biodiversity. Therefore, PhytoSquene® contributes to the preservation of marine biodiversity.

Accelerating Innovation

From **AustinPx**, their *KinetiSol*^(TM) Technology wins for accelerating innovation. KinetiSol is a fusion-based process for the manufacture of amorphous solid dispersion systems. It enables the thermal processing of heat-sensitive APIs and excipients without degradation by reducing cumulative thermal stress. The technology improves existing drug delivery methods but also paves the way for future developments, driving the pharmaceutical industry towards more sustainable and effective solutions.

Woman of the Year

Another new award for this year, with **Julia Tsetis** taking the crown as our first winner. Tsetis is CEO of the **OFET Pharmaceutical Group**. Nominated as a truly visionary woman, and someone who leaves “an indelible mark on the global healthcare landscape”. Tsetis demonstrates

a passionate commitment to the wider pharmaceutical and healthcare industry, through several ventures including United Nations High Commissioner for Refugees, and winning awards for corporate social responsibility and for sustainability. “Julia Tsetis embodies resilience, vision, and compassion. Her legacy extends beyond corporate success—it’s about empowering others, advancing science, and leaving the world better than she found it”.



On Track with CPHI Milan Track Sponsors





On Track with CPHI Milan Track Sponsors

The CPHI Milan Conference Tracks bring together speakers from across the pharmaceutical supply chain to discuss topics ranging from Manufacturing 5.0 to the Future of Pharmaceutical Ingredients, to innovations in Packaging and Sustainability. We sat down with some of the Track Sponsors to explore why CPHI Milan is the place to have these discussions.

Thermo Fisher Scientific: Manufacturing 5.0

This year's sponsors for the Manufacturing 5.0 Track – focusing on the core tenants of Industry 5.0, its evolution from Industry 4.0, and how the pharmaceutical sector is adapting – are **Thermo Fisher Scientific**. **Executive Director, Global Head of Technical & Scientific Affairs Anil Kane, PhD, MBA**, spoke with us about what it meant to be sponsoring the Manufacturing 5.0 Track at CPHI Milan [3].





1. What are the hallmarks of Pharma/Manufacturing 5.0?

Pharma and manufacturing 5.0 is transforming drug development and production by ensuring and leveraging advanced, human-centred technologies. This combination should not only help the industry but also puts patients first. Incorporating technologies like artificial intelligence and machine learning means more tailored therapies and faster, more efficient production processes. This can bring a stronger focus towards patient-centric solutions by combining the strengths of both human creativity and machine efficiency. Pharma 5.0 has the potential to drive innovation while maintaining a deep commitment to meeting individual patient needs.

2. How does Manufacturing 5.0 build upon current tenants of Industry 4.0?

Industry 5.0 represents a significant shift in how manufacturing processes are viewed and executed. Industry 4.0 has been around for a while, and it revolutionised production with advanced digital technology, automation, connectivity, and more. Industry 5.0 takes the industry further by reintroducing the human element into these processes. It emphasises the partnership between humans and technologies such as

artificial intelligence, leading to a more personalised and value-driven approach to manufacturing.

3. Why are we now seeing a shift towards a new manufacturing revolution?

The landscape for bringing new pharmaceutical products to market is evolving with the growing complexity of novel therapies. Global supply chain uncertainties, increased competition, intensified regulatory scrutiny, and compressed timelines have forced pharma companies to search for new ways of working, including the integration of augmented or virtual reality technology for more efficient training, and the widespread adoption of continuous manufacturing to guarantee product safety and quality without sacrificing speed-to-market. Additionally, major trends such as personalised medicine and the rise of artificial intelligence are reshaping the market. This requires increased customisation and flexibility for pharma companies to remain competitive.

4. Where do you hope to see Manufacturing 5.0 develop in the next few years?

Over the next few years, it is our hope that Manufacturing 5.0 will continue to emphasise the importance of patients



as the priority of the pharmaceutical manufacturing sector. We also anticipate more approvals for life-saving therapies for difficult-to-treat diseases, like cancers and rare diseases. We believe this will revolutionise the research and development process and bring effective medications to treat these diseases to market.

Packaging Innovation

The [Alliance of RTU](#) was created by founding members Gerresheimer, SCHOTT Pharma, and Stevanato Group as an open platform to share Ready-to-Use (RTU) advantages within the pharmaceutical industry. With a mission statement of advancing the industry's transition to high-quality sterile primary packaging with efficiency and safety. In this Track Sponsor interview, they discuss recent developments in packaging and what to expect from the Packaging Innovation track at CPHI Milan [4].

1. What are the latest developments in clinical vs commercial packaging?

Given biologics' dominance in the drug pipeline, the primary requirement for packaging is to ensure stability and integrity. RTU packaging has become a preferred solution, as it minimises handling, reduces contamination





risks, and supports biologics' stringent quality requirements.

Recent developments in clinical packaging show the need for customisation, small-batch production, and fast delivery. The smaller, more customised production batches in the clinical phase address limited demand and patient-specific requirements, where speed is critical to ensure timely treatment delivery.

Primary packaging providers are supporting the pharma partners, offering clinical trial kits with pre-sterilised containers and various components. On the other hand, commercial packaging trends favour scalable solutions like Ready-to-Use (RTU), which offer high-quality standards and greater flexibility in filling operations. Early adopters have successfully scaled RTU packaging from clinical to commercial production, accelerating the transition and reducing time to market.

2. What innovations in packaging have been developed to increase the recyclability and sustainability of products?

Recent innovations in packaging focus on enhancing both recyclability and sustainability, driven by advancements in materials and processes.

One significant development comes from Ready-to-Use (RTU) industrial setup. Increasing automation, it reduces potential contamination from glass-to-glass or glass-to-metal contact and improves sustainability by reducing breakage and increasing line efficiency, leading to less glass waste during production. Another element supporting sustainability is the implementation of alternative sterilisation methods to traditional methods like ethylene oxide (EtO), reducing environmental impact, e.g. steam sterilisation or sterilisation with low-temperature vaporised hydrogen peroxide (LT-VHP). In terms of materials, there's a shift towards better recyclable as well as bio-based polymers, which offer a more sustainable alternative to traditional plastics. Additionally, increasing the density of containers per package improves efficiency in shipping and storage, further minimising waste.

Overall, these innovations are helping to create more sustainable packaging systems that reduce waste, improve recyclability, and decrease pharmaceutical products' environmental footprint.

3. What is the most unmissable session from the track?

Attending the keynote speeches and the panel



discussion in the 'Alliance for RTU' session is a great opportunity to gain insights from key industry players in the pharmaceutical and CMO (Contract Manufacturing Organisation) sector. You can expect to learn about the effective utilisation of ready-to-use vials and cartridges in aseptic manufacturing processes and gain a comprehensive understanding of how leveraging these solutions can lead to benefits such as increased

flexibility and reduced quality risks through strategic process design while ensuring compliance with Annex 1 requirements.

4. Why is this track's subject so important to the pharmaceutical industry?

The increasing demand for injectable medicines and the regulatory pressure to meet safety standards are driving investments in advanced aseptic filling technologies. The utilisation of primary packaging, such as ready-to-use (RTU) platforms and innovative drug delivery systems, are pivotal elements in the pharmaceutical value chain. These components play a critical role in enhancing efficiency and safety simultaneously. Primary packaging acts as a bridge from production to the end user, ensuring safe storage and facilitating patient-centric, safe administration of medications. This underscores the importance of focusing on these aspects within the pharmaceutical industry to meet the evolving market needs and regulatory requirements.



CPHI
Milan

35th
Anniversary

INNOVATIVE STRATEGIES FOR SUCCESS:
INSIGHTS FROM LEGENDS, RISK MANAGEMENT, AND AI

- Learn from the legends
 - Build in Quality to Prevent Costly Recalls
 - Henry Ford
 - Toyota
 - Toyota Group
 - Toyota Production System
 - Benchmark
 - What I Learned from the US Navy
 - Manage Risk: Instantaneous, not reversible & has dire consequences

CPHI
Milan

Packaging Innovation Theatre

Speaker Deep Dives

TRANSITIONING THE INDUSTRY
TO HIGH-QUALITY STERILE PRIMARY
PACKAGING TO ENHANCE
OPERATIONAL EFFICIENCY
AND PATIENT SAFETY

Alliance for RTU

CPHI





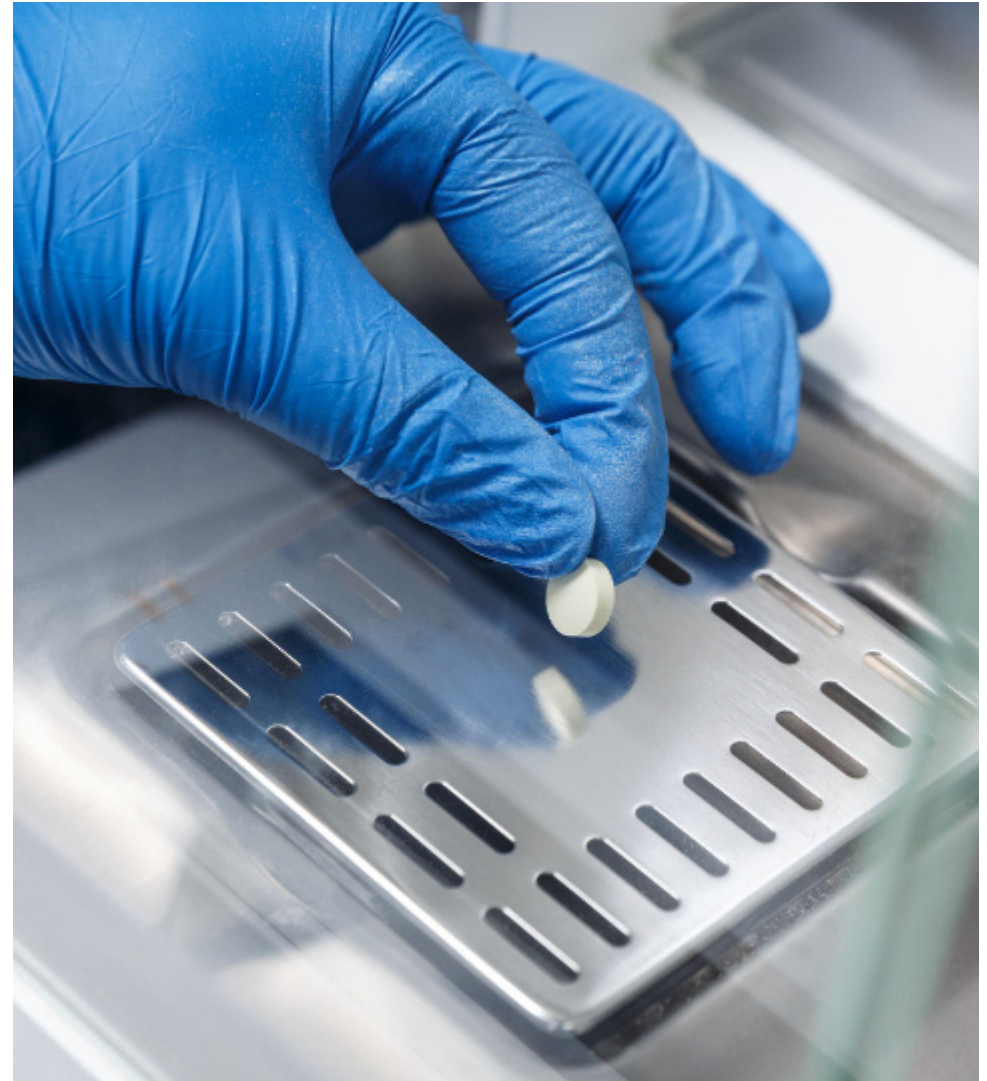
Speaker Deep Dives

CPHI Milan provides a space to learn and gain expert insight from 160+ speakers across five content tracks, all within the span of 3 days. Speakers at this year's CPHI hail from organisations such as Medicines for Europe, the European Commission, Novartis Oncology, Deloitte, IQVIA, EXCiPACT, and more.

We interviewed some of the speakers presenting at this year's conference, and discovered how CPHI Milan fosters important conversations on all aspects of the pharmaceutical industry and supply chain.

Navigating outsourcing partnerships for and with start-ups

Bernardo Estupiñán Gaisbauer, Managing Partner at CDMO Advisor, spoke about the evolving relationship between CDMOs and the biotech/pharma industry, including partnerships with start-ups in pharma [5].





1. For start-ups, what are some important aspects to consider when looking for a CDMO partnership?

Very important for start-ups is to define short-, medium-, and long-term objectives. I say this because often startups are focused on long-term objectives and want to partner with a CDMO with commercial experience. While this is nice it is not a realistic objective. Short- and medium-term objectives should be the focus, and looking for CDMOs with expertise in development and troubleshooting is critical. It is important to get the proof-of-concept (POC) along with developability and manufacturability studies firmed up so that the programme can make it into the clinic. One-stop shops are OK, but the boutique niche service providers may deliver greater value for the cost.

2. For CDMOs, what makes for a worthwhile partnership with a start-up?

This really depends on the CDMO. We track CDMOs that go from 'boutique' to 'one-stop shops' and the reality is that all CDMOs want to partner with a start-up, particularly if they are well funded. This, however, may not be a worthwhile partnership. A worthwhile partnership hinges on fair give and take. Helping the start-up reach

the clinic through a combination of goodwill and revenue has been something I have always tried to achieve when I was working on the CDMO side, and it is something that I look for now that I work on the start-up side. This makes it a worthwhile partnership because a start-up helps the CDMO grow its expertise and long-term, as more projects are added to the start-up pipeline, these projects ultimately feed the CDMO's own sales funnel. In return, the CDMO helps the start-up achieve its milestones, clinical objectives, and financial goals. This is a true win-win partnership.

3. How do events like CPHI help foster partnerships between CDMOs and start-ups?

Events like CPHI provide a forum where CDMOs can meet with start-ups and vice versa. Meeting is how you start a partnership, and this allows you to very quickly determine if a partnership is even possible. It is always important to mix business with social interactions, and events like CPHI provide both the business forum and the social and networking forum.



A new horizon: manufacturing and localisation in Africa

Part of the panel “Pharma Manufacturing in Emerging Markets – Towards Localisation in Africa?”, speaker **Robert Matiru, Director, Programme Division at UNITAID**, gave some insight into the current pharmaceutical market for manufacturing in the African continent, and current opportunities for global investors [6].

1. The continent of Africa is seeing unprecedented growth in life science partnerships and investment. What is currently driving this growth?

There are a number of factors driving this growth. The first that comes to mind is a rising demand for healthcare. Africa as a continent has many countries with rapidly growing populations and these countries also have high degrees of urbanisation. These two factors are changing disease patterns, and generating demand for healthcare services and products at a level not seen before. These also link with economic growth – while many countries in Africa are considered low-income countries, their economic growth is on the rise. With that, there’s an ability for the acquisition of services for health





and healthcare. Some governments don't necessarily have established social health insurance schemes and a lot of health products are acquired through the private sector. But that does mean that there has been a rising demand to address these needs relative to the last 10–20 years, and we're seeing a lot more government initiatives and policies prioritising healthcare and life sciences. In every region of the continent, you're going to see these initiatives growing, such as those in Egypt, Morocco, Kenya, Rwanda, and South Africa.

We also see more investment in R&D in the life sciences sector in Africa as well, again relative to the last 10–15 years. To a varying degree, we're also seeing more access to funding and capital being unlocked, and with that growth in venture capital funds, grants, and impact investing are more opportunities for the life sciences sector to grow.

2. What are the current opportunities for local institutions as well as global investors in Africa?

For local institutions, one of the top opportunities is research and development. In many countries in Africa, there are more research institutions that can focus on innovation than in the past, driving innovation, creating IP,

and enhancing competitiveness. Of course, this requires public and private partnerships, and even global/national partnerships to enable these local institutions to grow their capacity and ability to invest in R&D. If you take Senegal for example, the Pasteur Institute of Dakar are collaborating with multiple entities globally to develop vaccines and rapid diagnostic tests, and what is driving that collaboration is R&D. They are also looking at partnerships with institutes in the Global North and elsewhere – in Kenya, there's the Kenya Medical Research Institute, in Uganda you have the Makerere University, and in South Africa, there is a long list of leading universities driving innovation in R&D. This is all to say there's a number of countries that are pushing the needle on building homegrown and locally based R&D centres.

Building local capacity for manufacturing, distribution, and regulation is also key. Trends following the end of COVID-19 aim to bolster local and regional production. National independence, health security in the economic and health industry – these are real opportunities to leverage momentum and build local capacity not just for manufacturing but for associated sectors such as regulation. One essential factor here is intra-country



movement of goods. The African Continental free Trade agreement has great potential to facilitate supply chains in going beyond regional borders and even continental.

For global investors, there are a number of top opportunities building on what I've mentioned. The growing market demand in Africa brings an associated demand for healthcare products and services, enabling global investors unbridled opportunities to tap into the pharmaceutical, medical devices, diagnostics, and other health services markets. Africa is home to a wide range of emerging markets and untapped potential. Looking at economic statistics, African countries dominate the list of the world's fastest-growing economies in 2024 according to the African Development Bank. This is really positive in terms of opportunities for global investors. The markets are not mature but if investors can tap into these markets, they can help drive them in a way that is not found in more developed health sector markets.

3. What challenges does the African pharma market still face in harnessing and strengthening collaborative opportunities?

On one hand, the regulatory environment in Africa is highly variable, and in many cases not very well



developed. There are only six national regulatory authorities at the WHO-listed maturity level 3. We need to get to a place where many more national regulators are reaching maturity levels 3 and 4 in terms of linked functional regulatory systems, harmonisation, and reliance. 55 countries on one continent cannot become maturity level 3 or 4 overnight – therefore, greater reliance and harmonisation of regulatory systems is going to be a big challenge. Depending on the continent, international partners coming in and building out



capacities need to rely on functioning systems.

Another challenge is access to capital and financing. Many development banks provide loans, but ticket sizes are still too high. SMEs typically look for a few million US\$ or less, but if you have a ticket size of 30m+ they just can't access or deploy that capital. These things must be addressed so that you are creating a better environment from a financing perspective for SMEs who want to build out capacity, but must start smaller before they can become bigger.

The political environment is also a challenge, in that you can have a very stable political economy in a particular country or region, and sometimes you see that shift quite rapidly despite many years of stability. This isn't unique to Africa but it is a persistent challenge for the continent. It can dampen industrial confidence or set back progress that has already taken place. As mentioned earlier, another key challenge is intra-country trade and the movement of goods. The ACFTA is not yet up and running the way it needs to be, which is key for the pharmaceutical sector. For the ACFTA there could be a major boom if it can be functional in the right way in the next 5 years or so from now.

Manufacturing 5.0 Keynote addresses partnerships and patient access

Elisabeth Stampa, Board Member at Medichem SA and President for Medicines for Europe, spoke to us pre-show about her keynote address for the Manufacturing 5.0 track. She explores how shifting partnerships are shaping pharmaceutical manufacturing, and what to look out for in Pharma 5.0.

1. How are shifts in partnerships shaping the future of pharma manufacturing? From CDMO relationships to working with Start-Ups?

Partnerships have always existed and will continue to grow. Many new products and newer technologies start at small companies or start-ups. Then, larger, innovative pharma firms develop them. The relationship between CDMOs and start-ups is a prime example of collaboration. It shows how independent businesses can thrive together using each other's strengths. One of the best and recent collaborations happened with the development and massive production of some of the COVID-19 vaccines.



2. How are companies scaling up manufacturing capacity to meet demand in certain areas, for example in the production of vaccines or blockbuster medicines such as obesity drugs?

Recently, many companies have started or boosted sterile production capacity. This expansion started with the demand for COVID-19 vaccines and continues to grow with GLP-1 drug needs. The acquisition of Novo by Catalent is a prime example. Not only research firms are growing. Both small and large contract development manufacturing organisations (CDMOs) are also ramping up production. They aim to meet rising demand and adhere to stricter regulations, like Europe's Annex 1. This has a spill-over effect on equipment & parts as well as on active ingredients and excipients, all experiencing increasing demand and production.

3. How is AI and digitalisation being used to push manufacturing into the future?

Digitalisation is helping to establish the best manufacturing conditions by defining "golden batches", which lead to reduced waste, increased yield, and process validation & optimisation. In manufacturing, other areas benefiting from digitalisation and AI are



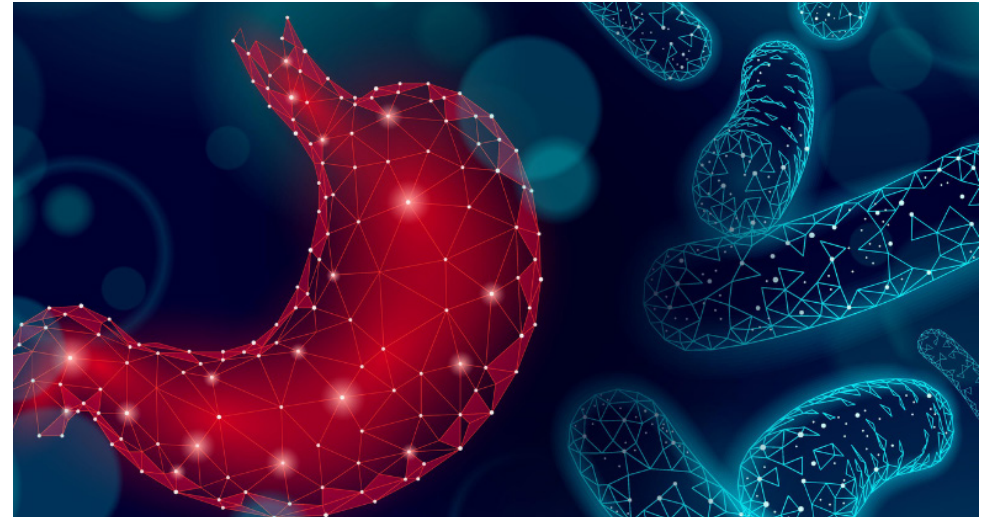
scale-up, increased automation, demand planning, stock forecasting, and manufacturing plant maintenance.

The microbiome's role in future therapies

Longtime CPHI contributor and friend **Rajiv Khatau, Managing Director of LODAAT Pharma**, took the time to discuss his panel on the microbiome's importance and potential in future innovative therapies [7].

1. There is a buzz around LODAAT at this year's CPHI and specifically about your investments in rare disease orphan drugs, biosimilars, and innovative molecules. What all the attention about?

I'm glad you asked. LODAAT has always been a quiet leader in the field of US generics, nutraceuticals, and OTC. Our mandate has always been the health and wellness for all humankind and we realised that the only way to really reach this ambitious goal is to think outside the box, so we created a new entity, LIFE SCIENCES ADVISORS or LSA that invests in high value molecules, novel therapies, biosimilars – MABS and ADCs – as well as rare disease



and orphan drugs. We now have over 69 molecules in our portfolio.

Our goal is to work with visionary partners and out-license these molecules to all regions of the world, especially sovereign nations that want to be the leaders in their healthcare infrastructure. LSA is investing up to \$500M of our own funds and financing out-license partners. It's really a visionary approach but we believe that we can make a difference in all therapeutics, especially in oncology, immunology, healthy aging, and of course the microbiome.



2. Please could you give a brief overview of the role of the microbiome when addressing people's health and in the development of medicines?

The gut microbiome has been considered the “second brain” because of its links to many different areas of the body including the brain, skin, even the liver. Each person has over 100 million bacteria in the gut, the intricacies of the different bacteria are not only complex, but also a nascent area of research. The microbiome has a fascinating ability to influence all areas of health.

Though there are many unknowns in how bacteria interact within the gut, what we do know for certain is that a healthy community of microbes is essential for human health, and these microbes are fuelled by complex polysaccharides derived primarily from plant fibre. Most populations do not consume enough fibre to feed our gut and when we neglect to provide sufficient fibre to the gut or alter the microbiome with antibiotics and other therapeutics, we increase the likelihood of unwellness such as inflammation, IBD, Crohn's disease etc. This area of research and development for new therapeutics is a huge market opportunity and LODAAT is at the forefront.

3. How could the microbiome be used when developing future therapies, such as orphan drugs for rare diseases?

An unhealthy microbiome will show symptoms that are common in many orphan and rare diseases, and new future therapies can be used alongside ingredients and dietary supplements. According to recent research, at least 5–10% of rare diseases are linked to an unhealthy gut microbiome. TYK2 inhibitors are an example of this kind of innovative approach to handling autoimmune disease. LODAAT's investment arm is proud of our research and ongoing investments in this arena.

You have to remember that in the microbiome, what is healthy for a 20-year old, may not be healthy for an 80-year old. When we consider health, we often want to “revert” our bodies to our younger selves... the gut microbiome is one area where younger does not equal healthier! In fact, having a gut that stays the same, i.e. stays the way it was when we were young, is actually an indication of poor health. Future therapies that want to address longevity and creating longer healthier lives need to address this point.

Conference Highlights:
**Silent Theatres,
Buzzing Conversations**



Conference Highlights

CPHI Milan featured several silent theatres spread across the show floors, each corresponding to a session track. From Manufacturing 5.0, Packaging Innovation, Sustainable Futures, and Next-Gen Bio, our silent theatres may have made little noise in the halls, but the conversations generated are sure to keep the buzz going long after the show.

Keynote: The EU's Biotech & Biomanufacturing Strategy

With the EU as the fourth largest pharma market in terms of sales, and third overall in terms of profit, the EU continues to be an important geostrategic sector for the pharmaceutical industry, as presented by **Giulia Del Brenna, Deputy Director/Head of Unit – DG for internal Market, Industry, Entrepreneurship, and SMEs at the European Commission**. Del Brenna gave a [keynote address](#) to kick-off the Next-Gen Bio Theatre with a broad overview of the EU's biotech and biomanufacturing sector.

The biologics market is growing at a CAGR of 9.1%, with the EU exporting €277 billion worth of medicines, and 11% of all goods exported globally. Alongside the EU innovative biologics market, the biosimilars and CDMO markets are also quickly growing to become biomanufacturing key players. Such a growth has not gone unnoticed by legislators. Several EU policies are supporting this rise in biopharma – reforms of EU pharma legislations include accelerated approval timelines, simplification of regulatory frameworks, medicine shortage prevention plans, advancing digital and AI integration in the supply chain, and, for the first time, a list of critical medicines in the EU.

Del Brenna emphasised the opportunities for large-scale skills partnerships for the EU health industries, with a call for communication to build the future with strategic action-plans to boost the biotech and biomanufacturing sector across Europe.

The Future of Pharma Manufacturing

Long-time CPHI friend **Elisabeth Stampa, President of Medicines for Europe**, gave her [opening remarks](#) at the Manufacturing 5.0 Theatre in Hall 5 on the Future of



Pharma Manufacturing. A colossal topic for anyone to take on, Stampa gave a broad but concise overview on the key trends for global pharmaceutical manufacturing, with a few main pillars taking centre-stage.

The biggest subject on everyone's minds is the implementation and usage of AI and automation in pharmaceutical manufacturing. "What we are now

experiencing is the hype of Deep Machine Learning. AI has been used for many years but with the launch of things like Chat GPT, there are thousands of conferences around the world bringing together experts in artificial intelligence for use in pharmaceutical manufacturing." Target discovery driven by Deep Learning was exemplified in Pfizer's PAXLOVID development, which used



AI to establish what was the most stable crystallised form of the API.” Regarding the power of AI, Stampa comments that it is not that modern computation is not enough for researchers to handle – it is that the experimental means are not equipped to handle the exponential number of drug-like molecules for modern computation. Screening and experimenting with this many molecules is a challenge, one in which AI and Deep Machine Learning may be a means of providing a solution. While not exclusive to the European supply chain, Stampa listed “five buckets of relevant AI-usage: drug discovery, clinical development, operations, commercialisation, and medical affairs.

However, Stampa did note that in Europe, there exists some associated skepticism of AI. “There are only two products where AI has helped to identify molecules that have gone on to become drug products. While each of these drugs show promise, neither have become blockbuster drugs products (yet).” However, she notes that the future of pharmaceutical manufacturing is already contending with present-day usage of AI, and that pharmaceutical manufacturers.

At the end of the day, however, Stampa noted, is

the importance of complying with regulations while advocating for regulatory flexibility. “Different regulators around the world must agree on what they accept or don’t accept, what the industry proposes to national health authorities, and how they harmonise and understand each other, which isn’t easy,” Stampa commented. Such regulations will inevitably include the use of AI and Deep Machine Learning, but harmonisation is still a key factor within current pharmaceutical manufacturing operations. There is an optimistic perspective that in the next few years there will be increased harmonisation, making treatments more accessible and regulating new technologies for these products.

Moving along to sustainability and Green Chemistry, Stampa noted that the pharmaceutical industry is one of the highest energy-consuming industry in the world, and the increasingly complex pharmaceutical supply chain and use of hazardous materials only adds to the industry’s environmental footprint. Big topics in sustainability for pharma include, according to Stampa, the “European Green deal that states what regulations for pharma will require in 2030 and 2050. We also have



a trend for Green Chemistry and increasing use of biodegradable materials in not only drug products but also packaging.”

Navigating Nitrosamines: Strategies, Safety, and Supplier Impact

Over at the Future of Pharma and Ingredients Theatre, **Danita Broyles, Director – Quality Assurance – Compendial, Analytical, Microbiological, Stability (CAMS) at Harmony Biosciences**, [discussed the importance of assessing and accounting for nitrosamine impurities](#) from ingredient through to the final drug product, and what companies should do to proactively protect themselves and their patients.

Nitrosamines, organic compounds formed from a nitroso and amino group, are a potentially carcinogenic group of compounds that can present throughout the drug manufacturing process. The impact to patients is obvious, but the impact to companies could mean product recalls and distrust in a brand, affecting business throughout. In order to assess the risk of nitrosamines

to a company, Broyles noted it is important to have a thorough and, most importantly, a documented risk assessment, evaluating the risk of formation for nitrosamines in the product. Health authorities are also placing expectations on companies to understand the entirety of their supply chain, and good relationships with suppliers can mean the difference between nitrosamine contamination and a safe drug product.

Pharma Manufacturing in Emerging Markets – Towards Localisation in Africa?

The panel discussion on [Pharma Manufacturing in Emerging Markets – Towards Localisation in Africa?](#) is now on at the Manufacturing 5.0 Theatre in Hall 5. **Pushpa Vijayaraghavan** moderated a panel of exciting panellists as they discuss ideas around regional and continental markets, covering fundable projects across African nations.

Important insights were brought up regarding access to capital as well as talent development in Africa. Malick Daniel outlined that the investment landscape of Africa



is “definitely changing. Before COVID, we saw traditional investment models in projects. COVID changed this model, and we are starting to partner with companies and develop projects alongside them, sharing the risk early. This has been an important aspect of the evolution of providing capital in nascent environments. We have to start from scratch, and that begins with building up the infrastructure and regulatory environment.”

Partnerships was also a buzzword during the panel, for all it will be important to work together to build the basics, such as building talent, access to capital, and create enablers to attract companies to set-up and run successful businesses within the African continental hub, stated Manuel Martin.

Nutraceuticals: from R&D innovation to Consumer-Driven Delivery Solutions

Catarina Abreu, Head of Nutraceuticals at PIPA LLC, [*gave a buzzing session*](#) on how companies can tap into consumer-driven markets to better drive innovation in nutraceuticals. With the rise of e-commerce, personalised





nutrition, and greater global connections, patients are having a greater say in their healthcare than ever before. Abreu outlined several strategies for nutraceutical companies to take advantage of consumer-driven markets, including AI tools to analyse market trends and consumer insights, but also for nutraceutical and bioactive compound discovery, formulation, and manufacturing.

More than ever before, Precision Nutrition is becoming an emerging trend for ingredient companies to invest their time and technologies in, with biomarker analysis being transformed by AI and data analytics. Pharmaceutical ingredients companies would benefit from implementing such technologies to enhance their business strategies

and serve patients looking to take ownership of their own health, says Abreu.

Why the Middle East Can Be the New Frontier for Next Generation Medicine

This session was looking at the largest market in the Middle East, and why it is set to become the next frontier for biotechnology. Detailing the aspirations of the National Biotechnology Strategy the speakers, **Eleonora Brero, Senior Principal Management Consulting, Life Sciences, IQVIA, Abdullah Al-Ali, Chief Advisor, Pharmaceuticals and Bio-Technology, National Industrial Development Centre, Dr Khalid Adnan Nasser Alburikan, Advisor to His Excellency the Saudi Vice Minister of Health, National Industrial Development Centre and Claudia Palme, Senior Advisor Life Sciences and Independent Board Director, Strategy&&**, covered each aspect of the strategy and how the whole region is working towards the goals of Vision 2030.

Brero began giving some context to the market, compared to other global markets, for its maturity





level, the level of adoption of biotechnology, and the therapeutic areas most covered in the Gulf region.

The first presentation as part of the session was from Brero, giving some background to the Middle East pharma market, especially highlighting the significant growth seen in the region. The majority of growth in the Middle East has been seen in Saudi Arabia and the UAE, and this growth has been very rapid. The pharmaceutical market in Saudi Arabia has grown from US\$8.5 billion in 2020 to US\$11.8 billion in 2024, and in UAE it has nearly doubled, from US\$2.5 billion to US\$4.4 billion from 2020 to 2024.

Brero also highlighted the main disease focus areas in the region, with antidiabetes medicines coming out as the most represented in biotech, followed by oncology and immunology, but these two areas are less mature compared to other, more established markets.

Alburikan built upon this, giving context to the disease areas of the future, stating that years ago antibiotics were the top medicine, but now, with further research and investment into areas like genomics the scope of the region is expanding. This is further encouraged with the influx of talent from different areas bringing new perspectives and ideas to the biotech field in the Middle East.



The new infrastructure in the region and the investment into research genomics sets up the Middle East for being able to produce more medications and hopefully solve several health problems.

This venture is aided by the government through systems such as grants for early-stage investors, to support startups and small businesses, and with research facilities and hospitals providing a wealth of expertise to compliment.

[FUJIFILM Diosynth Biotechnologies: Why the Middle East Can Be the New Frontier for Next Generation Medicine](#)



Mentorship programme

CPHI launched a [Mentorship Programme](#) at this year's CPHI. The scheme promised to be a new and exciting initiative to pair professionals at an early point in their career with more experienced industry leaders. In Milan, the programme was launched, kicking off with a panel consisting of some of our very own women leaders at CPHI.

The panel opened with **Shanaya Lalmahomed**, who is the ideas woman behind the programme, saying about how she wants to help women in the industry, it was highlighted for her by women in India at CPHI India that there are still so many discrepancies with how women and men are treated in the workplace. Lalmahomed asked women from all our events and realised it's the same issues the women were experiencing, the same things holding them back, it is a global issue, so she thought what can we do, as a huge global platform she recognised the opportunity we have as CPHI to find people that can work together and offer advice and support each other and to help guide people, and women in particular, through their careers.



Chelsey Lang, Head of Brand and Community – Pharma, Tara Dougal, Brand and Content Director – Pharma, and Silvia Forroova, Director, Partnerships and Sustainability, make their way to the stage to discuss mentoring and being a role model from a personal standpoint.

Forroova commented on coaching, a role that she embodies regularly, she stated that coaching can be great for accountability, coaches can help to build structure and give mentees a strong canvas to work from.

“Mentorship is about nourishing and nurturing each other, it can be very relational based. And there is a rewarding aspect when you see your mentee grow and achieve their goals.”

She stated that the guidance you can offer people can really make a huge positive impact.

Lang spoke from the perspective of being a mentee, she describes how academia doesn't necessarily prepare you for the workplace, and so her mentor helped her to adjust, and helped guide her in what opportunities she could have in her career. As a mentor now, she described how being a mentor can help with overcoming challenges that you might not have anticipated.

Dougal advocated for mentorship as a way of building confidence in your own abilities and getting your voice heard:

“Mentorship is a safe space, where you can put your ideas out there without judgement, someone to push you and challenge you but who supports and believes in you in that.”

One of the audience members added their voice as a CEO of a consulting company for regulatory affairs:

“Growing in international affairs in the corporate world, as a mentor I would like to encourage people to have an entrepreneurial spirit even in the corporate world, grow with that drive and passion.”



Insights Lounge

Customer Insights:

What the CPHI Community is Saying





Customer Insights: What the CPHI Community is Saying

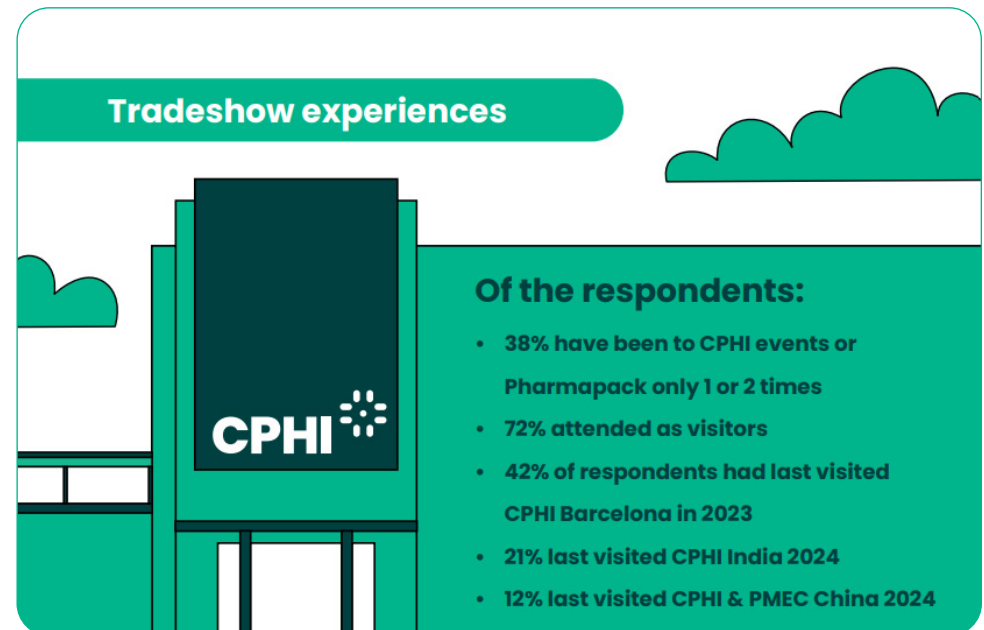
The Customer Insights (CI) team gathers feedback from the CPHI community throughout the year to better understand the ins and outs of the pharmaceutical supply chain, as well as how CPHI shows can better facilitate collaboration and networking opportunities.

Each year, the CI team shares the intel gathered from their annual Strategy Survey, and this year is no exception. Based on 758 responses, the 2024 Strategy Survey uncovers what the CPHI community believes to be the most pertinent topics of discussion, how best to share knowledge and innovations, and how events like CPHI can improve to better meet the needs of collaborative pharmaceutical professionals.

Respondents to the 2024 Strategy Survey primarily operated in Generic Finished Products (18%), contract manufacturing and development (11%), and Generic APIs (9%). 47% of companies are based in Asia, 29% in

the EU, and 11% in MENA (Middle East and North Africa), showcasing an increased interest in the Middle East region for the CPHI community.

In terms of experience at trade shows, 38% of respondents have been to CPHI events at least once before, highlighting a growing new audience base for our events. 42% of these attended CPHI Barcelona last year, and 12% last visited CPHI & P MEC Chia 2024 in June. 72% of survey-takers attended CPHI Milan as visitors.





How CPHI can support biopharma and CDMO relationships

The top five ways CPHI can support relationships in pharma are:



Networking reception



Matchmaking



Platforms for technology demonstrations



Roundtables



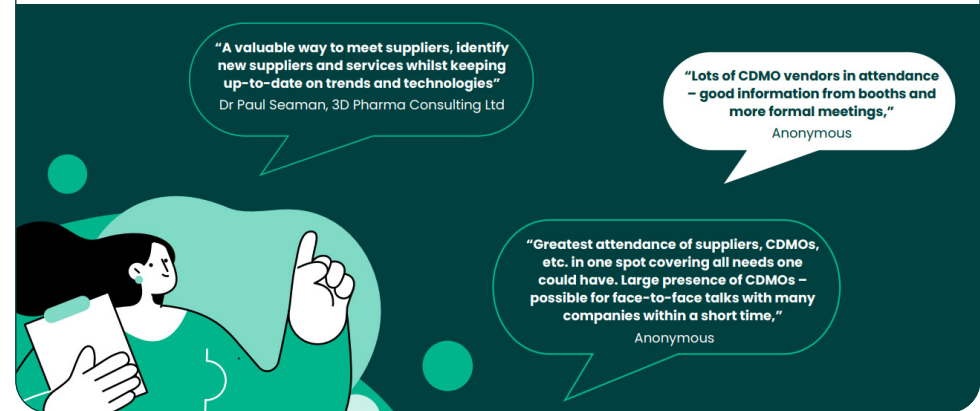
Joint workshops/seminars

Other methods of support focus on supporting new entrants that have budget limitations.

The show floor is not the only way in which events like CPHI Milan help to foster innovation and collaboration throughout the pharmaceutical industry. The CPHI community has stated that some of the top ways that CPHI helps biopharma and CMDO relationships include networking receptions, roundtables, and joint workshops and seminars.

At the CI lounge, **Customer Insights Director Stella Tsiakalou** and her team were hustling and bustling to understand what motivates, excites, and drives the CPHI

Attendees had the following to say about CDMOs/CMOs at events like CPHI Barcelona:



"A valuable way to meet suppliers, identify new suppliers and services whilst keeping up-to-date on trends and technologies"
Dr Paul Seaman, 3D Pharma Consulting Ltd

"Lots of CDMO vendors in attendance – good information from booths and more formal meetings,"
Anonymous

"Greatest attendance of suppliers, CDMOs, etc. in one spot covering all needs one could have. Large presence of CDMOs – possible for face-to-face talks with many companies within a short time,"
Anonymous

community at Milan. "We had over 2000 interactions, from focus groups to in-depth interviews, on all kinds of topics such as biologics, to regional markets like Greece, Poland, and Turkey, and much more," commented Tsiakalou. "This year, all our conversations were mind-blowing because our participants were very open in sharing what they are working on, and it was great to talk about both the trends of the pharmaceutical industry, but also what the industry is NOT talking about. There is a growing interest in automation and AI in pharma, and how CPHI already supports their exhibitors there."

Pharma Trends Outlook Preview:

Roundtable Round-up





Pharma Trends Outlook Preview: Roundtable Round-up

Every January, we publish our annual CPHI Online Pharma Trends Outlook report that identifies key trends shaping the pharmaceutical industry in the year to come.

This year we were excited to bring together leading industry experts and thought leaders at CPHI Milan to discuss, face-to-face, the biggest happenings in pharma for 2025. As the biggest pharmaceutical trade show that unites the global pharmaceutical industry, this roundtable discussion dove into topics including AI and Industry 5.0, patient-centred technologies, pharmaceutical market segmentation, emerging pharmaceutical markets, and more.

Keep reading for a sneak peek at our 2025 Pharma Trends Outlook and find out what our panel of experts say are emerging pharmaceutical trends.





On the BIOSECURE Act

A hot topic for all at CPHI Milan was the impact of the BIOSECURE Act, passed by the US House of Representatives on September 9, 2024 [9]. The bill, if passed by the US Senate and signed into legislation, will effectively bar American-based companies from contracting with listed Chinese companies such as WuXi. The roundtable participants held a lengthy discussion on how partnerships across the pharmaceutical supply chain will fare under the act, and which players will enter this market should the bill come to pass.

Most participants agreed that, with a void “Let’s not forget that WuXi Biologics and some of the other companies on the list is an exception rather than the rule of a Chinese CMDO that has successfully expanded their business rapidly in the US,” stated **Claudia Lin, Executive Vice President at Pharmatech Associates**. “When we talk about WuXi and how much capacity other regions or companies can replace, we can’t forget that you can’t just build a number of sites and take over the gap left by WuXi. You must be able to operate at that level so this is what some Indian and some American companies looking to these opportunities must consider. I think that

message should be important to emphasise. It’s not just about capacity but also ability.”

Sudarshan Jain, Secretary General & Committee Member at the Indian Pharmaceutical Alliance & IGBA, concurred, stating that “Geographic diversification becomes very important in any part of the chain, whether it is APIs, or CMDOs etc. In building this diversification, there are three important factors – scale, talent, and competition... it is not regulations or even the BIOSECURE Act that will shift patterns in outsourcing. At the end of the day, customers want efficiency and they want service. India is a rising market with multiple advantages in terms of demographics, technical base, and a strong pharmaceutical industry.”





However, on the topic of which therapeutic areas may be most impacted by the BIOSECURE Act, some participants disagreed. **Director at Frost & Sullivan Unmesh Lal** also stated that “The BIOSECURE Act will impact Chinese CDMOs & CROs, which have been at the forefront of innovation and the transition towards a CRDMO business model. The near-term uncertainty shall lead to geographical diversification, divestitures, and corporate restructuring along with the reconfiguration of supply chains in the mid-term. This in turn shall create long-term growth opportunities for South Korean, Indian, and other Southeast Asian markets wherein we are witnessing investments in capabilities, talent, and capacity expansion by contract pharma service providers.”

Lin partially agreed, but was wary of which therapeutic areas would see increased investiture, stating that WuXi’s CGT business did not fare well at the start, and is not necessarily tied to pressures caused by the Act. “CGTs as new biologics are so variable and is not large-scale. [Companies] replicating what WuXi did well would be monoclonal antibodies. For CGTs, you cannot continuously scale-up with more sites. For CGT CDMOs, there must be a different strategy, such as focusing on plasmid GMP production, lentivirus production etc. but you do not necessarily have to build huge facilities. You need more flexible variety rather than scale numbers.”

On AI and automation in the pharma supply chain

Another hot-button topic for the roundtable was the current and future use of AI throughout the pharmaceutical supply chain. As Pharma 5.0 turns our attention towards patient-centric uses of technologies, our roundtable participants were keen to discuss what this might look like and how it might be adopted.

“One aspect that we are observing is not only focused on making technology more patient-centric, but also



on improving the efficiency of communication between patients, doctors, and pharmaceutical companies,” commented **Enzo Troncone, Founder and CEO of Butterfly Decisions**. “Key points here include understanding the major advantages of using AI today, evaluating the reliability of these technologies, and recognising that implementing such advancements requires significant investment. Without the right resources, developing the technology needed for a patient-centric system to effectively support healthcare becomes challenging.”

Concerning the human aspect, **CEO of Vector Talent Neil Kelly** posed an intriguing premise to the group: “There’s a definite rhetoric around if it is possible to remove the human in the process around creating data in the first place. Is the data poor because of the human? Are you seeing a growing appetite for that or is this a minority of opinions to remove the human?”

Catarina Abreu, Head of Nutraceuticals at PIPA LLC, answered in the negative, stating “Humans are what makes up part of the validation – this is a cyclic move, meaning that we create those algorithms but we ensure that we have a lot of experts, data scientists, bioinformaticians etc. to validate that process. It’s not

only creating that algorithm but also making sure that they function properly. It has to have human input.”

Troncone, however, did not completely agree. “We are integrating real-world data collected from experts with synthetic data, developing models that simulate system behaviour to enable more accurate predictions and analyses. However, it is essential to start with the right question, posed by a domain expert: specific knowledge is crucial to guide an analysis that accurately reflects real conditions, especially in complex fields like pharmaceuticals and healthcare.”

Thank you to our roundtable experts for their time and insight! Look out for our 2025 Pharma Trends Outlook Report in January 2025.

**Interested in learning more about our
CPHI Online Trend Reports?**
[Click here](#) to speak to a Digital Expert.



Spotlight on Sustainability at CPHI

Welcome to the Sustainability Centre
At the heart of Pharma



Spotlight on Sustainability at CPHI

Sustainability took centre stage at CPHI Milan (the theatre being strategically placed in Hall 6, it was quite literally central). The Sustainable Futures theatre featured 16 sessions all covering key aspects of sustainability that affect the pharmaceutical supply chain.

The event kicked off with a lively keynote discussion from **Heena Dodhia** and **David Rakowski** from **Deloitte** on the importance of considering sustainability in the pharmaceutical industry, and what areas can be improved upon in particular. This was then followed by a discussion into 'Understanding the Problem of Decarbonisation in Drug Delivery' where three speakers from **Lonza Capsules & Health Ingredients**, **Team Consulting** and **Eco-Inject Ltd** gave their perspectives according to their expertise on how decarbonisation can be achieved in the supply chain surrounding drug delivery, covering tablets, inhalers, and injectables.





Later on in the afternoon we heard from **Energize, from Schneider Electric**, on the impact of decarbonisation in the supply chain, once some of these processes have been implemented.

In this year's sustainability track, significant focus was placed on how sustainability can be better built in to business, from a culture and investment point of view.

One particularly interesting Fireside Chat was: [*Making Sustainability a Priority – How Sustainability Professionals Drive Organisational Culture*](#), with **Ilaria Lo Presti, Head of sustainability Engineering, COE Senior Director, GSK, Luca Satorello, Chief Transformation & Sustainability Officer, ICE Pharma, and Arne Kloke, Head of Service & Sustainability Management at SCHOTT Pharma**, and Chair of the track.

Kloke encouraged Lo Presti and Satorello to talk about their roles and how they are placed to help support a culture of sustainability, from the perspectives of two very different pharma companies.

Satorello comments on the influence of private equity funds on a business, where the management has to communicate with the board and shareholders, and

agree on sustainability terms together. When this is done it can be very beneficial and ensures a more holistic view around sustainability, but if this isn't something that is aligned at this level, then entrenching environmentally friendly values into the core business becomes much harder.

Lo Presti stated that in her work at GSK it's important to keep the main aim of the business in mind, which is providing medicines to patients, but increasingly, sustainability is the elephant in the room. She went on to say that there are several areas they've been working on for a while, such as reducing chemical waste and using chemical recycling, differentiating raw materials sources, and reducing Scope 3 emissions.

Kloke asked about GSK's investment into a biodiversity programme, and how the conversation with management led to this. Lo Presti highlighted the understanding that nature and the science of it is intrinsically linked to the climate and people's health, so the business wanted to implement initiatives to have a real impact at this point, that would ultimately benefit the health of people.

Satorello concluded the panel by stating that it takes



persistence and resilience to continually educate yourself, and the business, to keep pushing for change, even when it's difficult.

On Day 2 of the show, the Sustainable Futures theatre moved forward from the business side of the issue to some of the more practical aspects of the supply chain.

Tomas Pala, Corporate Affairs & Sustainability Manager from Medicines for Europe, Bo Gottlieb, Senior Project Manager, Novo Nordisk and Martin Held, Lecturer at the Department of Biosystems Science and Engineering, ETH Zurich gave presentations on ['Solutions to Sustainable Manufacturing – Green Facilities and Chemistry'](#).

Pala talked about how innovations and solutions can be made with technology and green chemistry, which can not only be used in APIs and excipients, but throughout the whole lifecycle of a product.

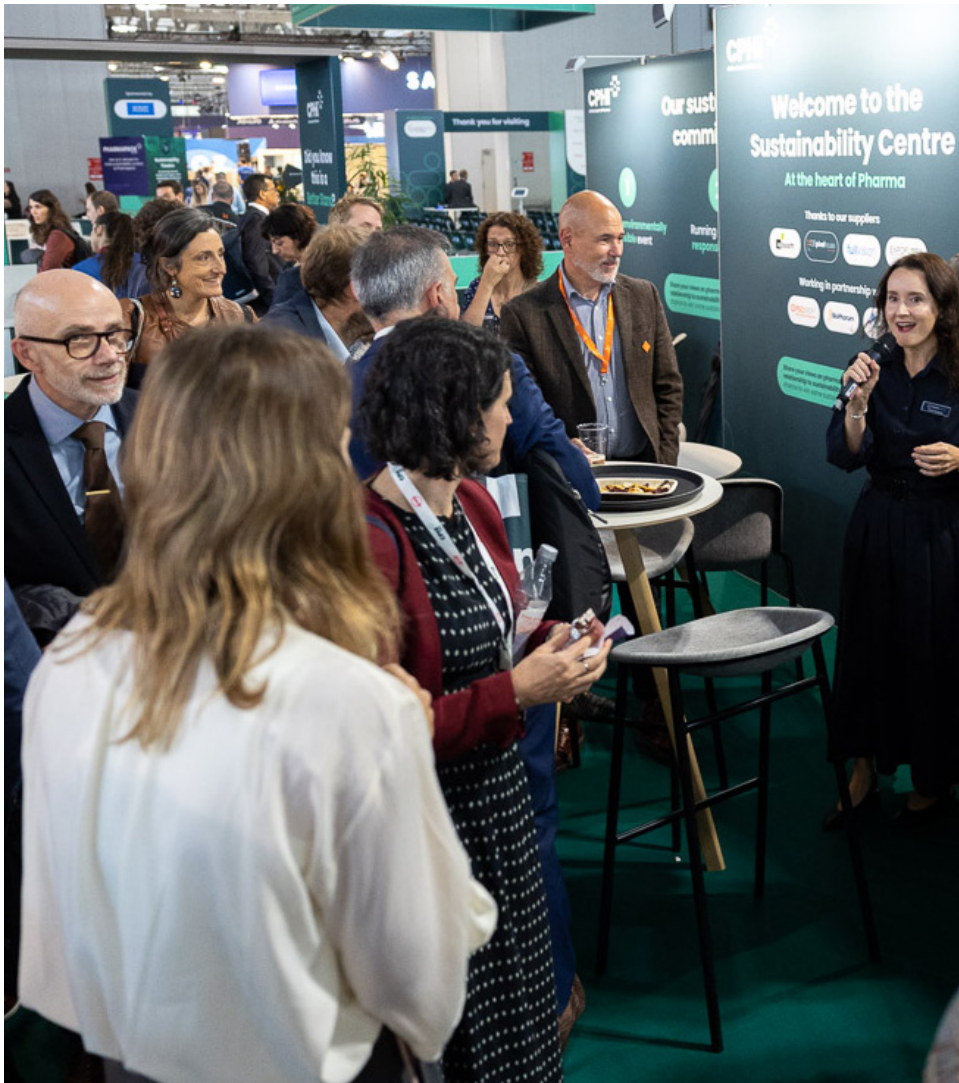
Held focused on plastic-based products, mostly in terms of packaging, and how carbon dioxide is used in their production. He highlighted companies that are using carbon derived from biomass instead of fossil fuels to produce plastics, Gottlieb gave an overview of how Novo Nordisk handles waste and aims to create a

circular economy. They aim to reduce waste wherever possible, moving away from the standard waste removal approach of landfill and incineration, instead looking into how they can reuse more elements and products with the idea of achieving closed loop recycling.

Several other talks from the day touched on the idea of recycling and a circular economy, whilst emphasising the importance of striking the balance between more conscious material choices, and patient safety.

Technology was also a common talking point under this theme, with trends surfacing around AI, digitalisation, and particularly for continuous manufacturing practices.

As well as the content side of things from the event, the Sustainability Centre was also making an impact at CPHI Milan, notably with the launch of the Sustainability Collective. The Collective is a dynamic group of those who can truly create a more sustainable pharmaceutical industry including sustainability leads, business leaders, academics, NGOs, sustainability entrepreneurs and policymakers. This collaborative initiative brings together various influential voices and pioneering minds dedicated to shaping a more sustainable future worldwide.



Commenting on the launch of the Collective at CPHI Milan **Silvia Forroova, Director, Partnerships and Sustainability, Informa Markets** stated:

“Sustainability is really at the heart of what we do at CPHI. We bring together changemakers who really want to take action when it comes to making change around sustainability for the pharmaceutical industry and supply chain.”

As part of the launch of the Collective CPHI hosted the Sustainability Collective Networking party. Here collaborators were invited for an afternoon of drinks, food and getting to know each other as experts in the pharmaceutical and healthcare industry, all with a vested interest in improving the state of sustainability as seen in the field.

The Sustainability Collective was introduced, greeted with much enthusiasm, and then it was brilliant to see all of these passionate people, who have a hand in all different aspects of the supply chain – from different sides of pharma including small private companies, to big corporations – coming together and already discussing solutions they’d like to see.

Start-Up Market

Start-Up Market

Start-Up Market

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PHARMLY

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CANNOVATION

Wellness
I-M-pulse

PHARMLY

CPHI
Milan

CANNOVATION

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I-M-P



Start-Up Market

This year's Start-Up Hub featured 89 companies, ranging from biotechnology innovators to digital accelerators to scalable device manufacturers. What began as an idea first implemented at CPHI Barcelona in 2023 has grown to a staple of CPHI events such as Pharmapack and CPHI North America.

"I'm thrilled to see such a vibrant community of 89 innovators coming together at the CPHI Start-Up Market," commented **Valentina Mognoni, Programme Manager – Pharma at Informa Markets.**

Participants in this year's Start-Up Market were given the chance to showcase their products, services, and innovative ideas on a global stage with an on-site pitch session. This year's companies were also able to engage with mentors from such companies as Honeywell, Evonne Brennan Consulting, JP Morgan, Edgewater Capital, and more.

"Being here and getting the chance to see all of our customers face-to-face and make new connections, being at the heart of everything, is very exciting," stated





Marianne Gissane, Director of Vector. “Having the opportunity to be in the Start-Up Market with other companies who are also growing, and to learn from them and their experiences has been great for us.”

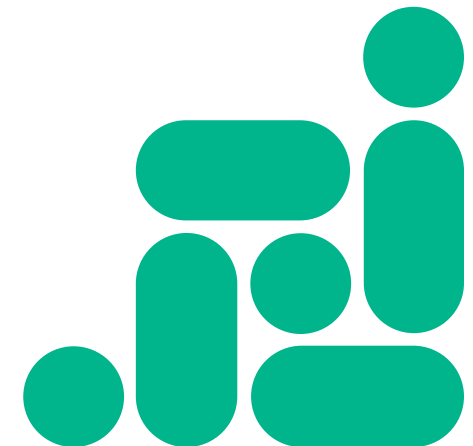
“It’s our second time here at the Start-Up Market, with our first in Barcelona,” commented **Brand Manager of Naturprodukt CZ/SK Otto Bartsch.** “This platform really helps us to find new possibilities and partnerships... For us, it’s a big step to present our name and brand.”

“Some of our highlights have been interacting with new people and demonstrating our products, and hopefully some of those good emotions can turn into new contracts,” **Gede Witsen, Export Manager of Naturprodukt CZ/SK** added.

Partners of the CPHI Milan Start-Up Market included CCD Partners, who gave an exclusive interview with CPHI Online on how companies can disrupt an established industry like pharmaceuticals.

[Click here to read the full interview](#)

“The positive feedback we’ve received from both start-ups and established companies highlights the value of this unique platform in fostering meaningful connections and collaborations,” Mognoni stated. “We’re excited to continue expanding the Start-Up Market, offering even more opportunities for emerging companies to showcase their potential and we look forward to seeing how these ideas shape the future of pharma in the years to come.”





Taking Care of Ourselves and Each Other

Head of
France, Italy,
Spain
General Manage
- Environmental
Director
Partnerships
and
Sustainability
Informa
Markets





Taking Care of Ourselves and Each Other

The Sustainable Futures Theatre also hosted the final day's various sessions on well-being in the pharmaceutical industry, and diversity and equity among the pharma workforce. After all, as a healthcare industry, the pharmaceutical sector has a role to play in uplifting and maintaining the health and wellness of ALL its workers and patients.

The Well-Being of Pharma Itself

Moderated by **Sofia Martinez Garcia Del Real, Content Executive at Informa Markets**, several experts throughout the pharmaceutical supply chain, including CPHI's own **Silvia Forroova, Rachel Riggs, General Manager – Environmental Strategy at Maritz**, and **Luca Grieco, Head of HR France, Italy, Spain at Dr. Reddy's Laboratories**, to discuss how the pharmaceutical industry itself can prioritise the health and well-being of those that work





for the health and well-being of others. “Clearly, in the pharmaceutical industry, we are all very busy working to care for the health and well-being of others,” Martinez asked the panel. “But who is caring for YOUR well-being? What do you think that well-being for pharmaceutical employees is being overlooked?”

Grieco answered, “There is a proverb in Italian that says ‘whoever makes the shoes has holes’. What I’m saying is that, as pharmaceutical companies are moving to a concept of prevention rather than treatment, this is something that can benefit how we think of well-being in a company environment – not only for our consumers but also our employees.”

Well-being as prevention was a key focus for the panel. Forroova noted that “Well-being needs to be standard. It needs to be part of our daily canvas, not necessarily setting goals for ourselves but being kind to ourselves and taking small steps for our lives inside and outside the workplace.”

“One of the things that is overlooked is taking time for yourself,” Riggs added. “You really have to make sure you think about yourself to meet those performance goals of your job.” Riggs spoke about unspoken performance

and strongly believed that those in leadership roles play. “Leadership must give their employees the time and space for their employees to reflect on their week but also to take care of themselves,” Riggs offered.

As the panel came to a close, one question asked by an audience member was how to build an ergonomic and holistic work environment for employees to take charge of their well-being. “I think it’s fundamental for the environment to set the tone of well-being,” Grieco answered. “This is not just a matter of walls – it’s about culture and communication. The disposition of the space and the facilities are also so important, with spaces not just for working. The environment will set the tone for this culture.”

Forroova added: “City architecture can be reflected in an office environment – closer proximity to nature and water, spaces for walking etc. – but also we can ask ourselves what we can bring into the environment. This might be something small we bring from home such as a nice mug, a picture etc. It’s two-fold. How are we enabling employees to collaborate but also what can we proactively do to enjoy and feel better in this environment.”



Leading with Diversity: The CEO Journey

Emma Banks, CEO of ramarketing, led a riveting discussion among C-suite executives across the pharmaceutical supply chain on the role of leadership in promoting diversity, equity, and inclusion in the pharma workplace. With panellists **Mahmoud Assy, Founder and CEO of Eufonia Diversity**, **Christina Smolke, CEO of Antheia**, **Hanns-Christian Mahler, CEO at ten23 health**, and **Federica Frascchetti, Associate Director of MSD**, the last day of CPHI Milan concluded with perhaps the most important discussion – the inclusion and accessibility of ALL in healthcare and pharmaceuticals.

When asked about the current state of diversity, Mahler commented that “If you look at CEOs of various companies, nobody is surprised to see only older, white men. The gender diversity at an investor roundtable I was part of was not diverse at all. This becomes a question of how we are failing to reflect the workforce of this industry, and it is a big problem here, especially as pharma is quite a conservative business.”

Smolke concurred, stating “As you go up to higher levels,





this industry does lose out on diversity. Even just the process of going through one's career, we must think how we are training people to go through the work environment? Diversity starts with how you train your senior employees so progression doesn't let biases influence their decisions."

Assy was quick to mention that diversity and inclusion are not achieved simply through conversations, but through cultural shifts. "It's about creating systems that promote inclusion, like with evaluations and promotions, to look at how people pass through these systems of evaluation and promotions. Bias training is great but it does not completely eliminate bias. How can you ensure there's a variety of perspectives evaluating this individual's access to opportunities?" Assy did acknowledge the impact of certain challenges such as sales and KPI targets, however he added that "If we do not allow an environment for all to participate, people don't want to contribute new ideas when dealing with certain challenges because they've been shut down for so long."

Banks then asked the panel how leaders in companies can overcome internal resistance. "The challenge to implementing a truly diverse environment doesn't

come from nowhere – it comes from the people," Frascchetti answered. "There's no one-fits-all solution, but we can focus on the training. It's important to both raise awareness and adapt these processes to your organisation. Some companies use a 10-minute video once a year, but some companies might recognise they need more than that. In-person training with different and specific experiences can get deliver the importance of inclusion and accessibility."

"That's why it's a systems approach and not just an HR issue," Mahler added.

Assy concluded with "Some people don't see the value in diversity because they don't see how it is relevant to them. We don't all go around bad-mouthing others, so why is it relevant? In fact, you can bake DE&I into almost any conversation you have."

**See you next year
(and online until then)!**





See you next year (and online until then)!

We're already looking forward to welcoming you to CPHI Frankfurt in 2025. As the years go by, CPHI has only gotten bigger and better, and we hope to continue to bring you premium networking opportunities, expert-led content and conference sessions, and a trade show experience unlike any other.

"CPHI Milan 2024 has been an absolutely incredible edition – we've welcomed thousands of attendees through the doors of Fiera," stated **Tara Dougal, Interim Brand and Content Director at Informa Markets**. "So much business gets done on-site and our exhibitors use this important event to drive business forward."

However, while we are sad to say 'arrivederci' to CPHI Milan, the business and networking doesn't stop. CPHI Online continues these highly relevant and topical conversations throughout the year with Trends Reports such as this, webinars, podcasts, and exclusive expert interviews all to share pharmaceutical knowledge

throughout the year. "We continue the conversation on CPHI Online, and it's a great opportunity to gather expert insights, to promote your brand, and create visibility all year around," Dougal explains. Looking forward to saying 'Hallo' to you in Frankfurt!

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