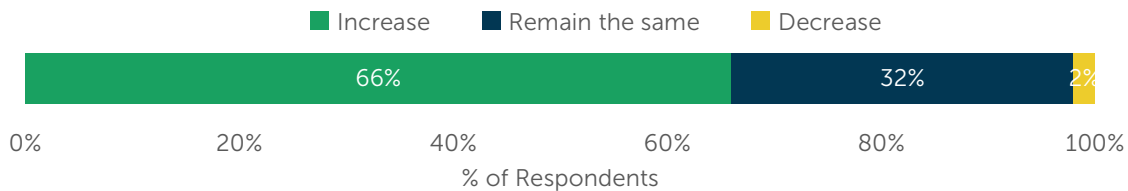


Predicted Changes in Outsourcing Rates for Highly Potent API



ISR’s latest research on Highly Potent API manufacturing asks participants whether they expect any change to the proportion of highly potent molecules in their portfolios, as well as any change to their outsourcing rate for high containment manufacturing. Two-thirds of respondents anticipate the proportion of highly potent assets in their pipelines and portfolios will grow over the next five years. Respondents anticipate the proportion of high containment manufacturing that they outsource will decrease over the next 5 years, pointing towards a desire to build internal capacity. On average, respondents’ companies currently outsource 72% of high containment manufacturing. In five years, survey participants expect their company to outsource an average of 62% of their high containment manufacturing activities.

“Thinking about five years from now, will the proportion of highly potent molecules in your company’s portfolio..”



“What proportion of your company’s high containment manufacturing activities are currently outsourced?”

“Thinking about five years from now, what proportion of your company’s high containment manufacturing activities will be outsourced?”

