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Building forward-thinking commercialization and channel strategies

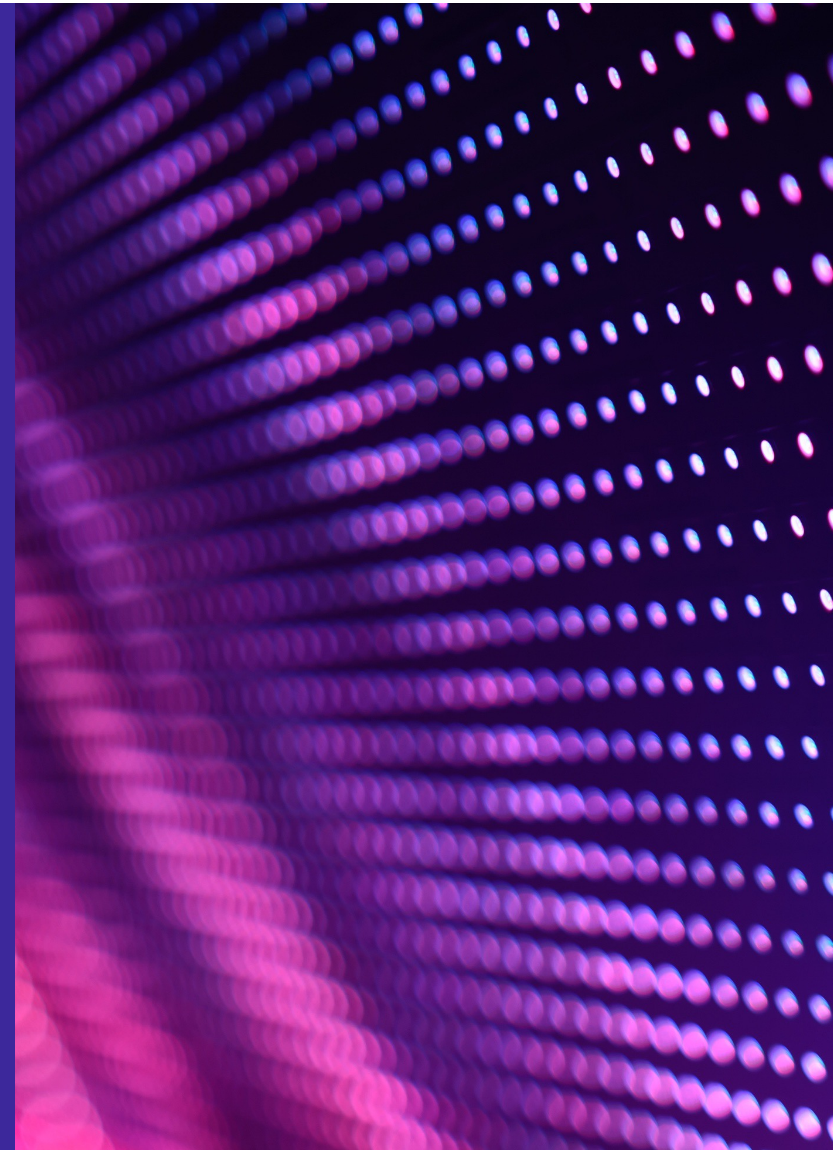
Tom Doyle, Chief Customer Officer, BioPharma Services

Bob Raffo, FirstView Financial President

Josh Guinter, Senior Director, Channel Strategy and Product Access, Strategic Global Sourcing

State of the market

Tom Doyle, Chief Customer Officer, BioPharma Services



As commercial leaders of your organizations…

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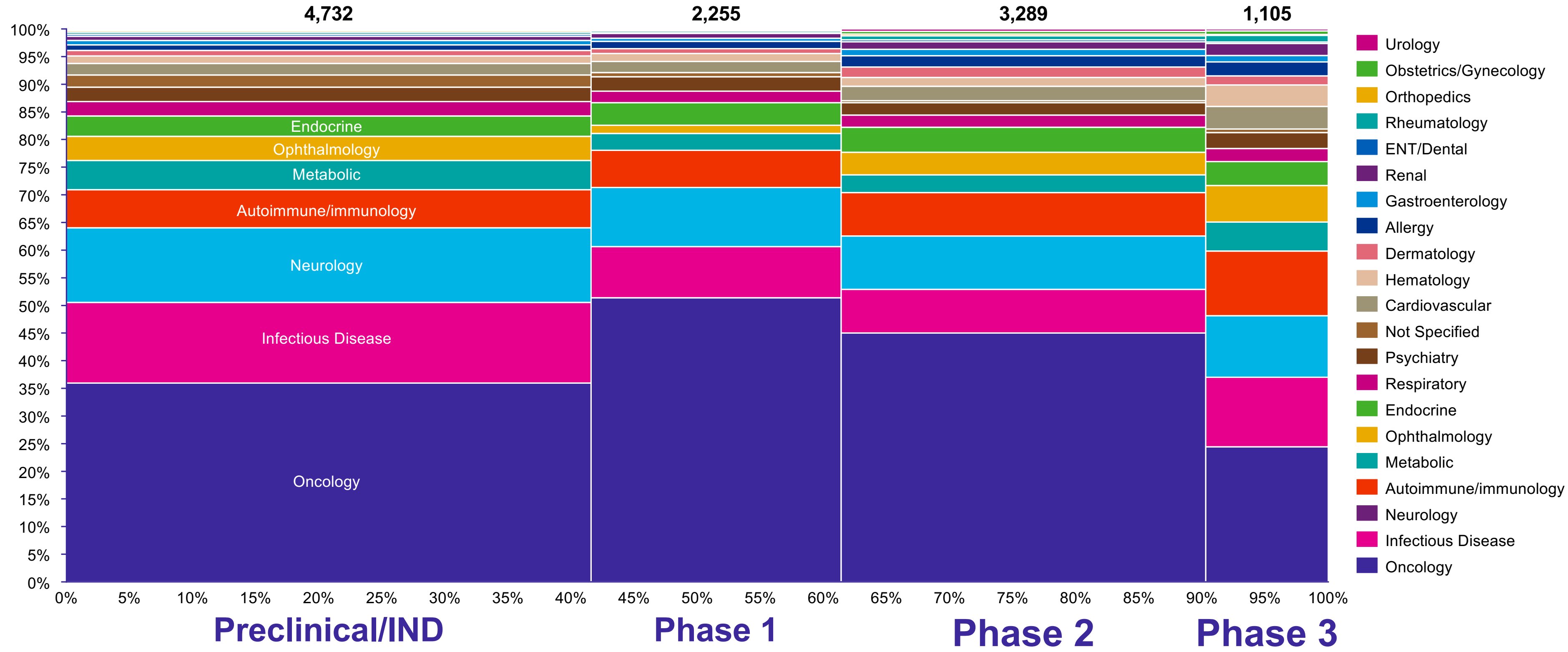
Robust pipeline growing more specialized

US therapeutic asset pipeline[a] by phase and therapeutic area, 2022[b]



[a] Excludes device data.
[b] Data as of May 2022.
Source: Informa Biomedtracker

Changing commercialization model

Insourcing of services

Emergence of new patient engagement models

Evolution of distribution

Reaching a global market

Market trends for products and companies driving the need for new commercialization models

Products

Growth in volume of drugs across all categories increasing

Driven by new approvals

Product mix shift towards specialty is continuing

Some specialty categories more than doubling by 2026

Number of patients served for each drug is decreasing

Specialty therapies target smaller patient populations

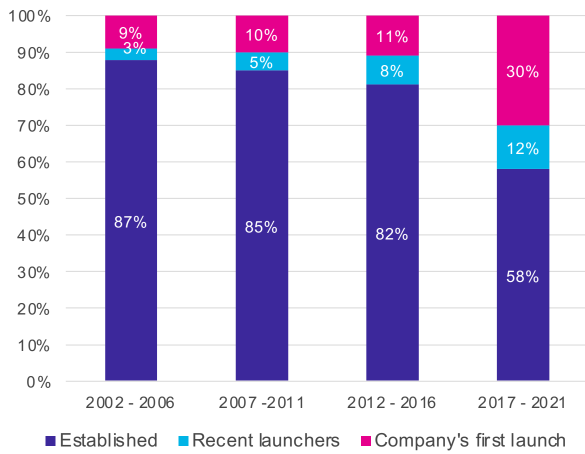
Average support services per patient is increasing

Pharma has willingness to provide more services for specialty therapies

Companies

More companies launching for first time—increased from 9% to 30% in last 10 years

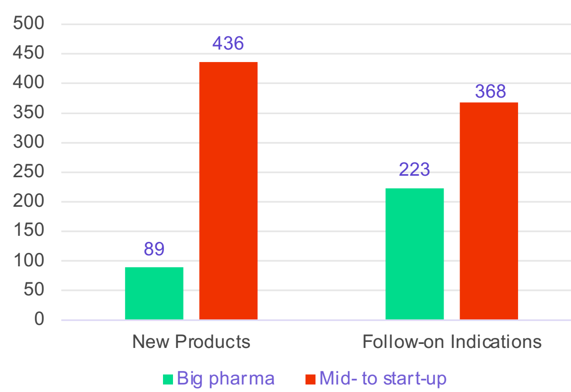
NMEs per year, split by company type



Source: CBER and CDER novel drug approvals, May 2022; EvaluatePharma, May 2022; McKinsey analysis.

More mid- to start-up companies launching new products and follow-on indications

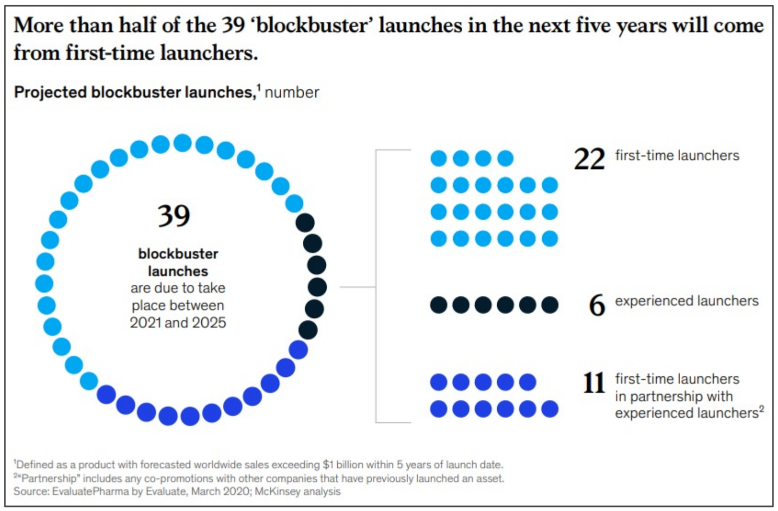
Phase 3 of development for new products, follow-on indications, split by large and mid- to start-up companies

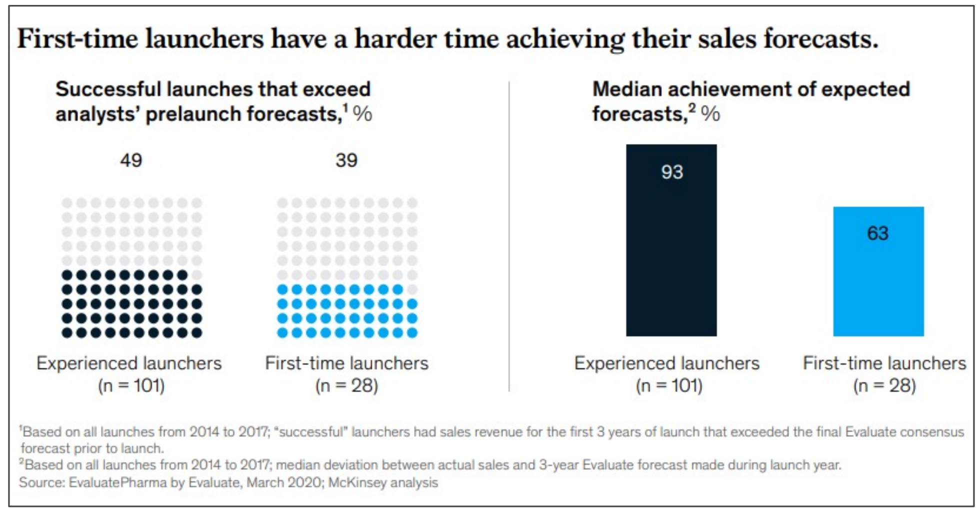


Phase 3 development includes those who have submitted BLA and NDA.

Source: Biomedtracker. Advanced drug search. Accessed October 6, 2022. https://www.biomedtracker.com

Commercial success challenging for first-time launchers



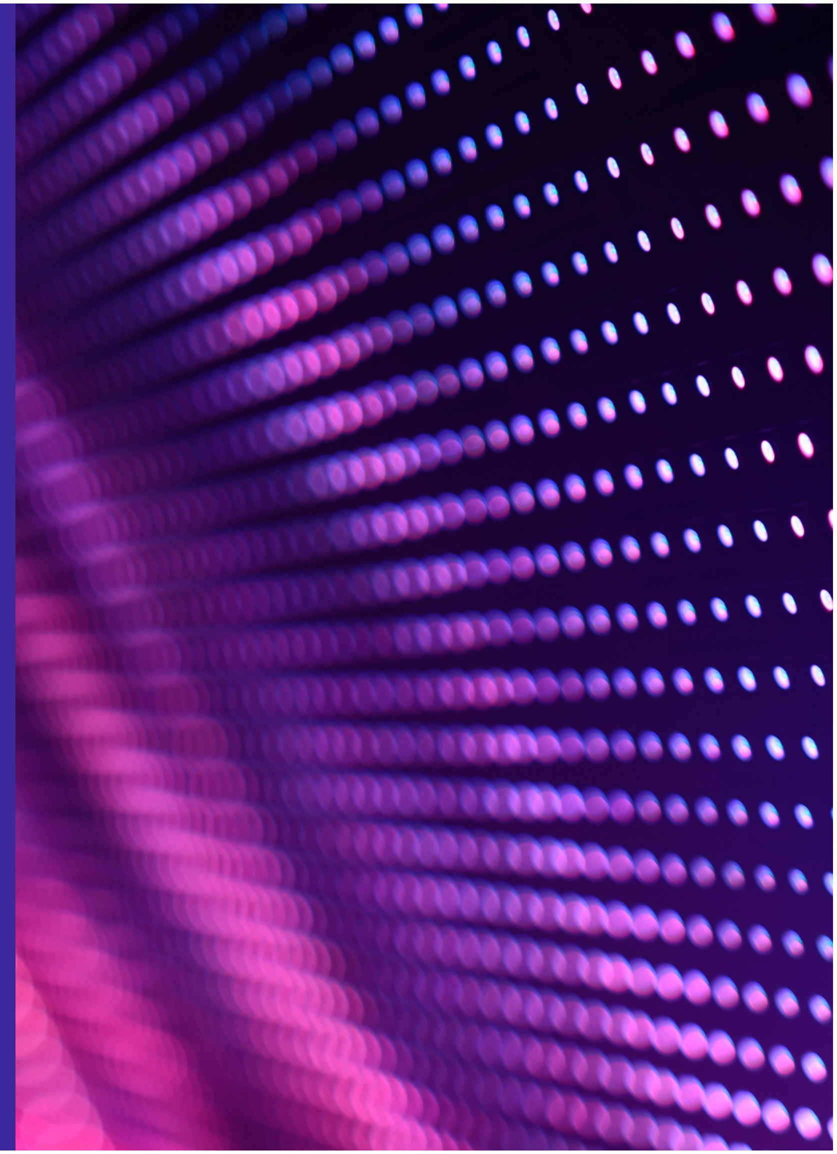


Source: EvaluatePharma by Evaluate, March 2020; McKinsey analysis.

Channel strategy

Joshua Guinter, Pharm.D., MBA

Senior Director, Channel Strategy and Product Access, Strategic Global Sourcing



We create unparalleled access, efficiency, and reliability to move health forward

The impact of channel strategy decisions

The areas of impact

Your patient's treatment journey

Your customers' experiences

Your brand's performance

The patient populations impacted

Ultra-rare disease states

Targeted

Large

Cell and gene

Channel strategy types

	Mail order pharmacies	Retail pharmacies	Specialty pharmacies	Hospital pharmacies	Clinics	MD specialty practices	Oncology practices
Full-line wholesale	✓	✓	✓	✓			
Specialty			✓	✓	✓	✓	✓

Channels

Channel strategy considerations

Company

- Company size (emerging, SMID, large)
- Focused vs broad therapeutic area
- Customer network size and access
- In-house vs out-sourced services

Product

- Clinical data (efficacy, safety, applicability)
- Logistics and special handling
- Competitive products and timing (esp. related to launch or LOE)
- Wholesale acquisition cost

Treatment Area

- Rare vs prevalent disease
- Urgency of treatment
- Maturity of care systems (referral networks, infrastructure, education)
- Site-of-care and payor coverage considerations

Real-life example of a channel strategy for CGT innovation

Leading capabilities in specialty

- Strong connectivity into provider base across all channels
- Leadership in largest specialty markets

Technology and data integration

- Modernizing core systems
- Enhancing digital capabilities and data integration

Forward-looking team model

- Designed for optimal customer alignment
- 360º focus

Integrated global capabilities

- Expansion of geographic footprint

Questions to guide your product's channel strategy

Based on our experience, what is likely to work well for this product's attributes or this patient population? Why?

What is going on across the market that might affect my product's launch?

How will my product's clinical roadmap/other indications affect the channel strategy?

What sites of care should I be thinking about and what impact might that have on my success?

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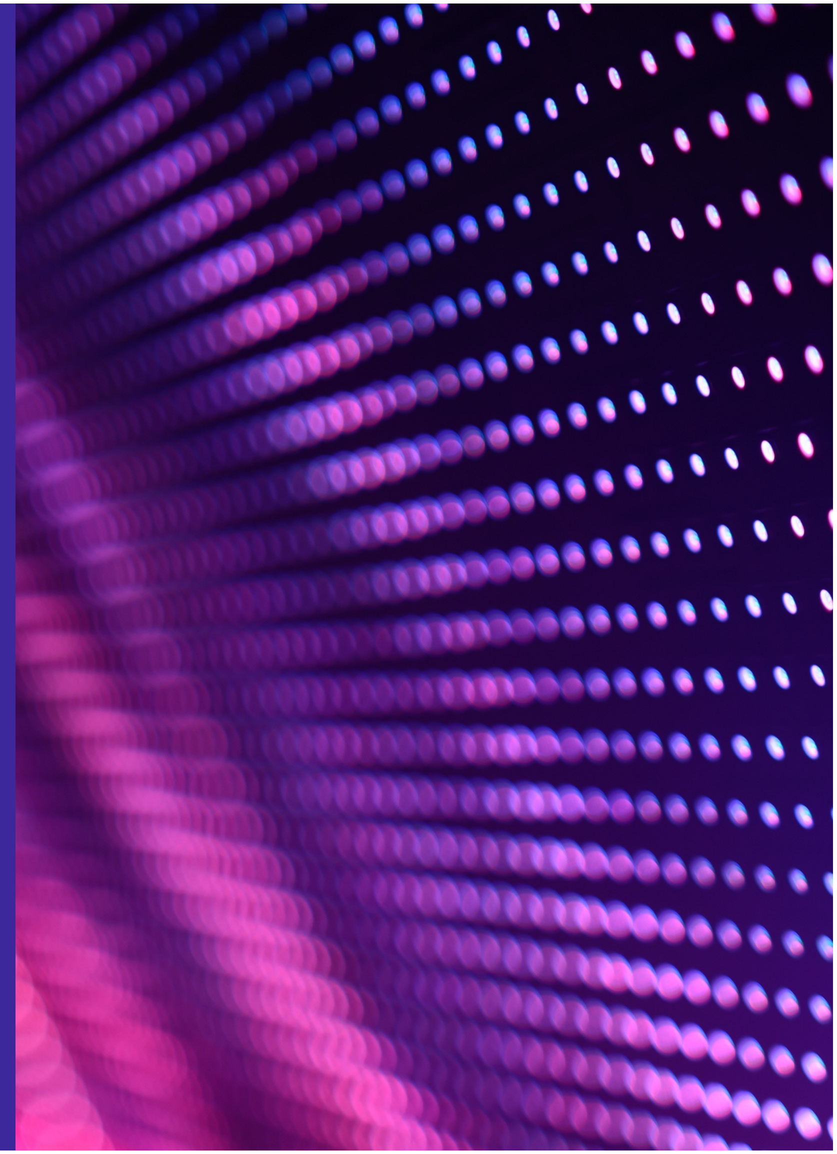
Access and affordability strategy

Bob Raffo, FirstView Financial President



Barriers to access

Patient

Specialty medications require a broader responsibility for pharma to ensure that the patient can manage the total cost of therapy.

Financial

Increased level of benefit dollars increases exposure.

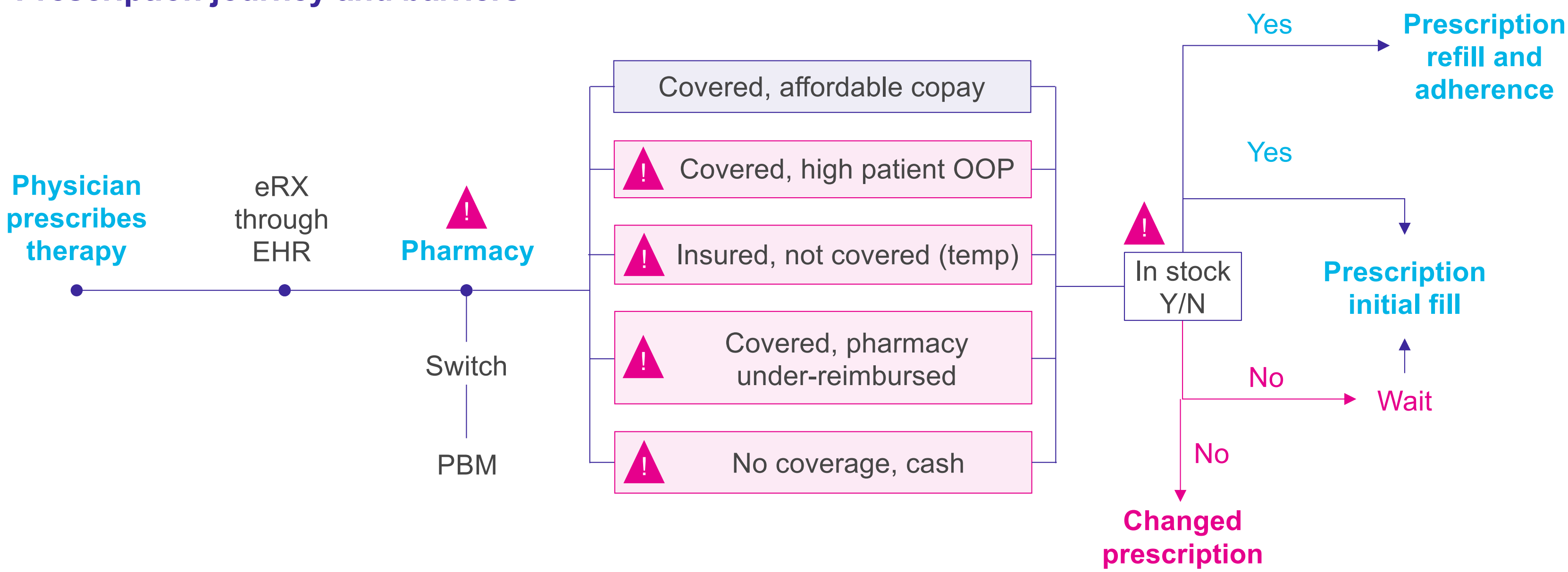
Regulatory

We believe CMS still intends for pharma to demonstrate a benefit to the patient.

Types of abandonment

Pharmacy Abandonment | Patient abandonment | Prescriber abandonment

Prescription journey and barriers



Potential barriers where a prescription may be changed or abandoned

Evolution of access and affordability

Pre-2015: Early Phase

Copay is a low-cost, high-volume, point-of-sale discount.

Typical patient benefit: Most drugs do not offer copay coupons and those that do typically provide just $75 in assistance.[1]

2015 - Present: Mature Phase

Copay is a high-cost, specialty-focused launch, competitive, or conversion strategy.

Typical patient benefit: $200 to $2000 claims[2] with most manufacturers using coupons, often with high-cost treatments.[3]

The near future…

Access and affordability

Integrated solution needed to move beyond copay providing **control** and **optionality** tailored to your specific brand

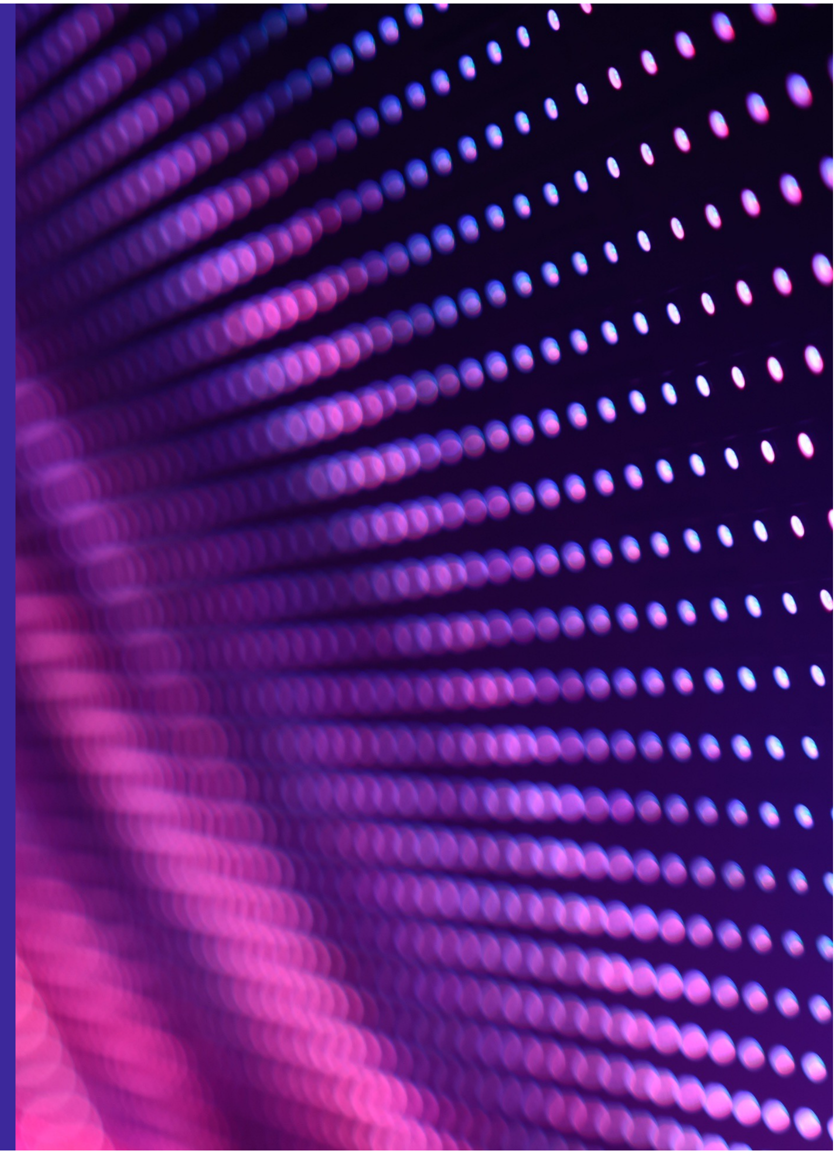
[1] Prescription Drug Copayment Coupon Landscape," by Karen Van Nuys, PhD et al, February 7, 2018

[2] Internal FirstView data, July – September 2022

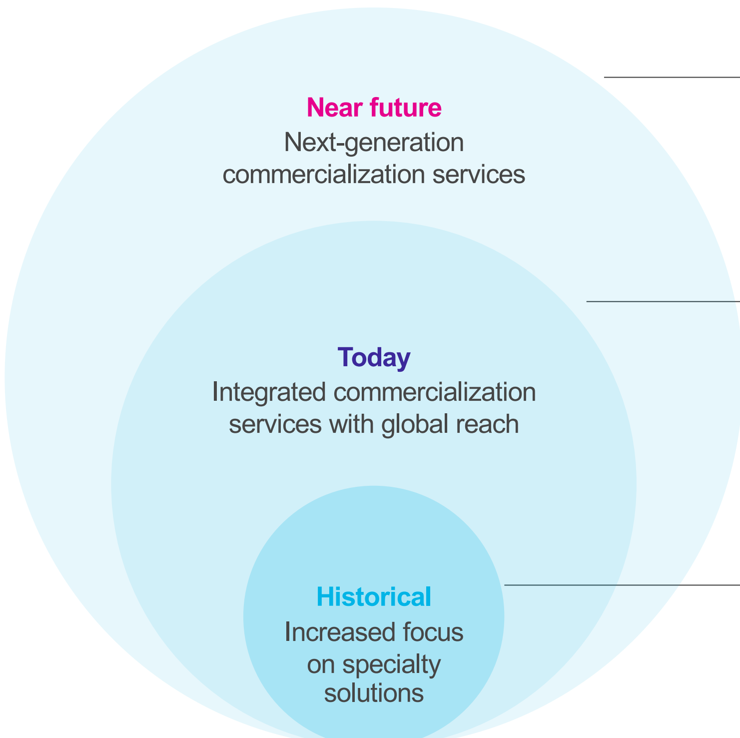
[3] Factors Associated With Manufacturer Drug Coupon Use at US Pharmacies So-Yeon Kang, MBA, MPH et al, JAMA Health Forum, August 13, 2021

Conclusion

Tom Doyle, Chief Customer Officer, BioPharma Services



The market is investing in commercialization solutions that drive emerging brand growth in global markets



Commercialization innovation

- Integration with therapeutic-specific provider networks
- New data insights through integrated service models
- End-to-end cell and gene orchestration

Expanded services with global reach

- Increased use of e-tool and automation
- Emergence of new technology driven segments
- More small to mid-size biopharma, first-time launches
- Expansion of global capabilities

Pioneered specialty solutions

- Investment in patient services, specialty distribution
- Investments in Infrastructure and advanced technologies

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Thank you

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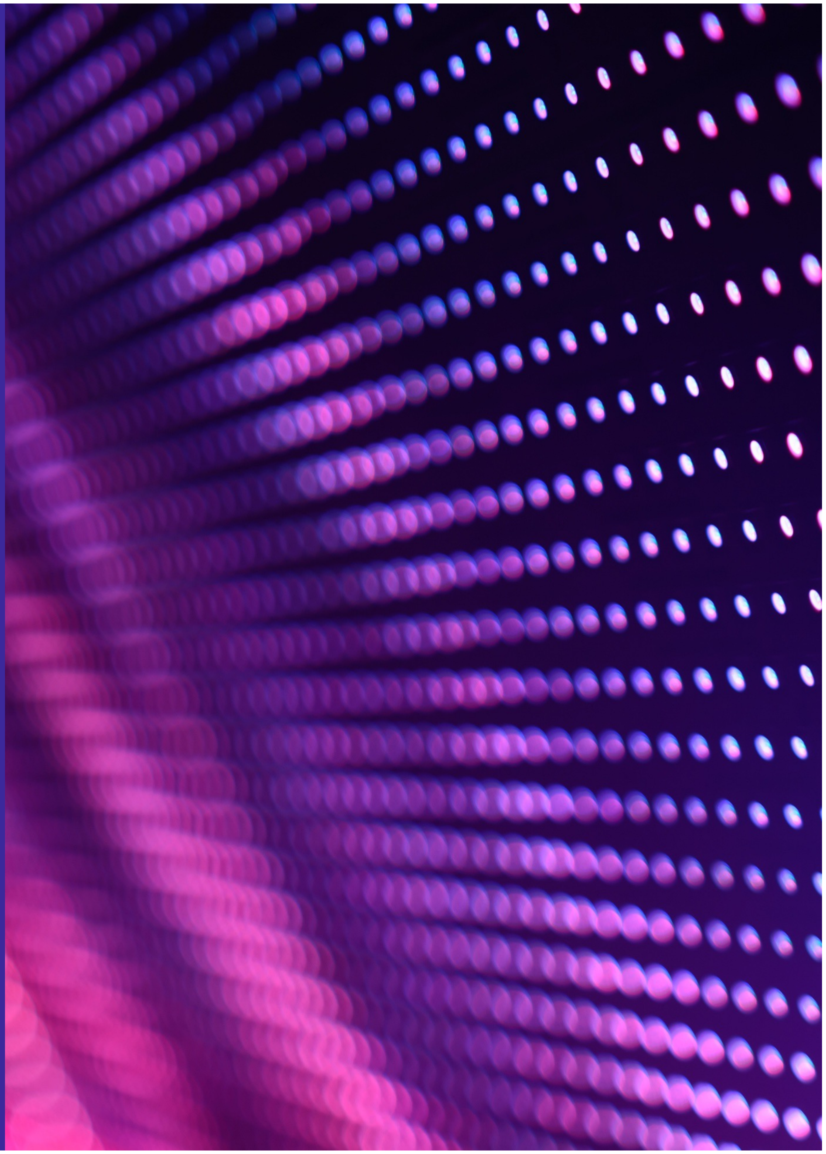
Appendix

More about AmerisourceBergen



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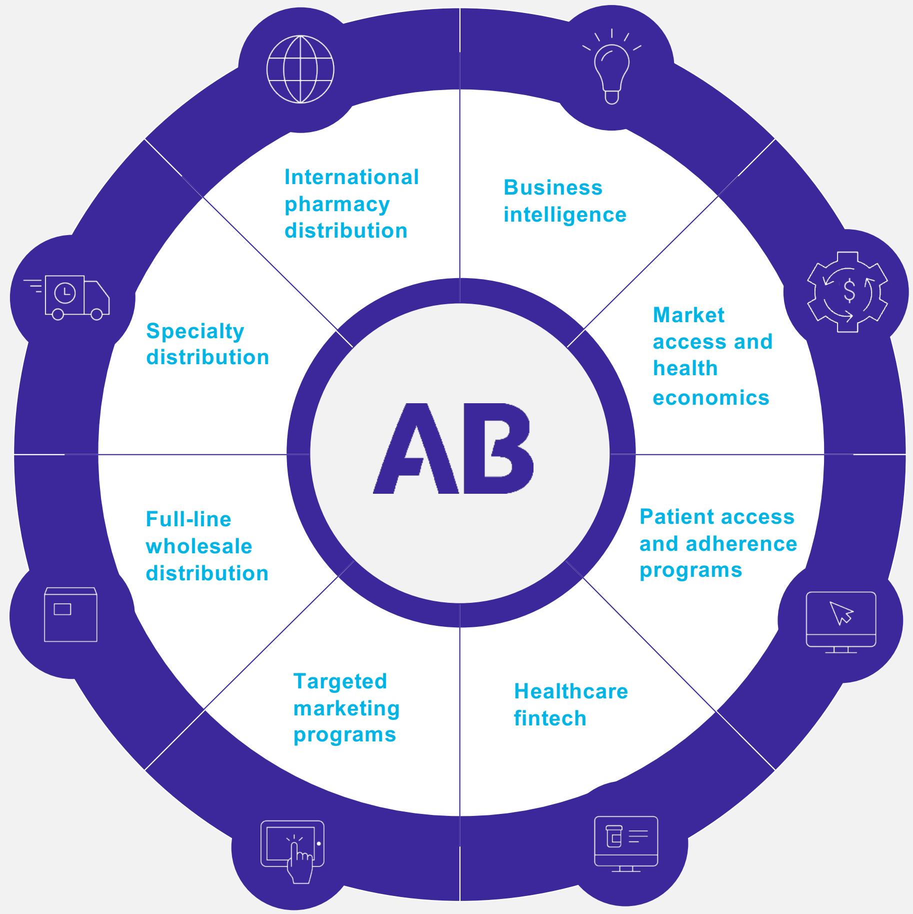
AmerisourceBergen is the right partner to unlock product potential and move health forward



Ensuring brand success and maximizing value creation

Pre-launch critical success factors

Starting early for optimal planning

Access to talent and building the right team

Understanding financial tradeoffs and maximizing resources

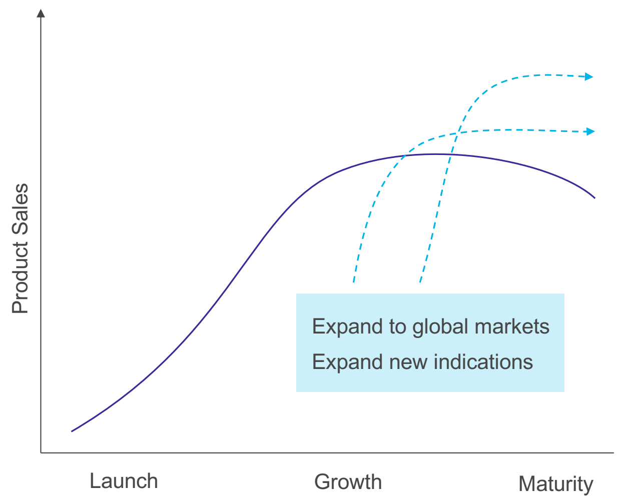
Designing a strategy specific to the therapeutic area and target market

Positioning your product among established players

Readiness for post-launch monitoring and rapid adjustments

Post-launch lifecycle management

Program-specific services mix evolves with lifecycle needs



How AB can help

End-to-end services

Unmatched experience

Flexible options for small and mid-size biopharma

Pharmacy, medical, or hybrid benefit

>9,000* consulting projects supporting over 600 brands

36 years of patient services leadership

Presence in **50+ countries** with 600+ global offices

*Internal data, as of 11/17/22