



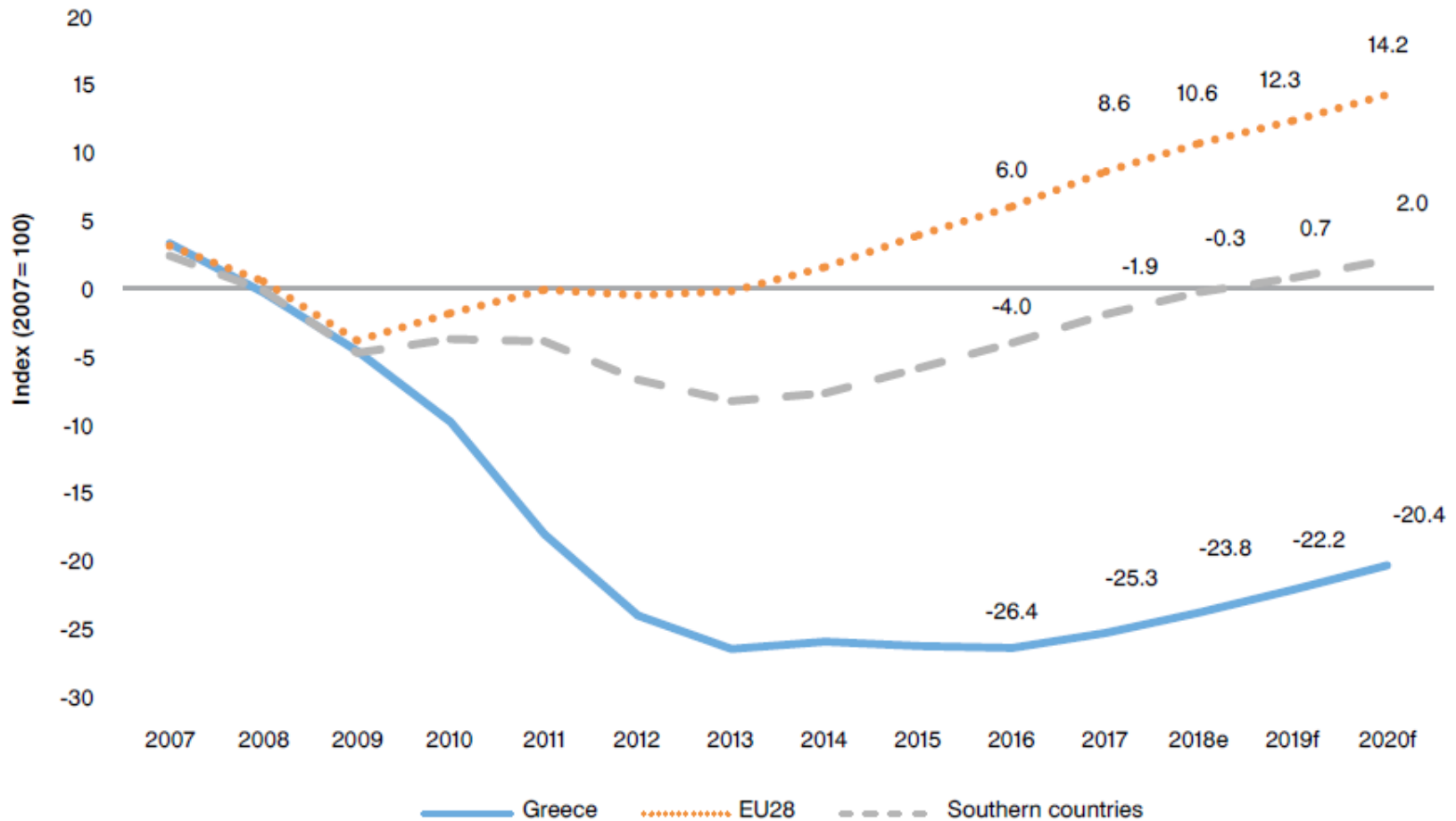
**23RD ROUNDTABLE
WITH THE GOVERNMENT OF GREECE
Europe: leaving
indecisiveness behind?**

July 16th-17th 2019
Grand Resort Lagonissi, Athens

Greek Pharmaceutical Industry: A game changer?

Theodore Tryfon
President, Panhellenic Union of Pharmaceutical Industry

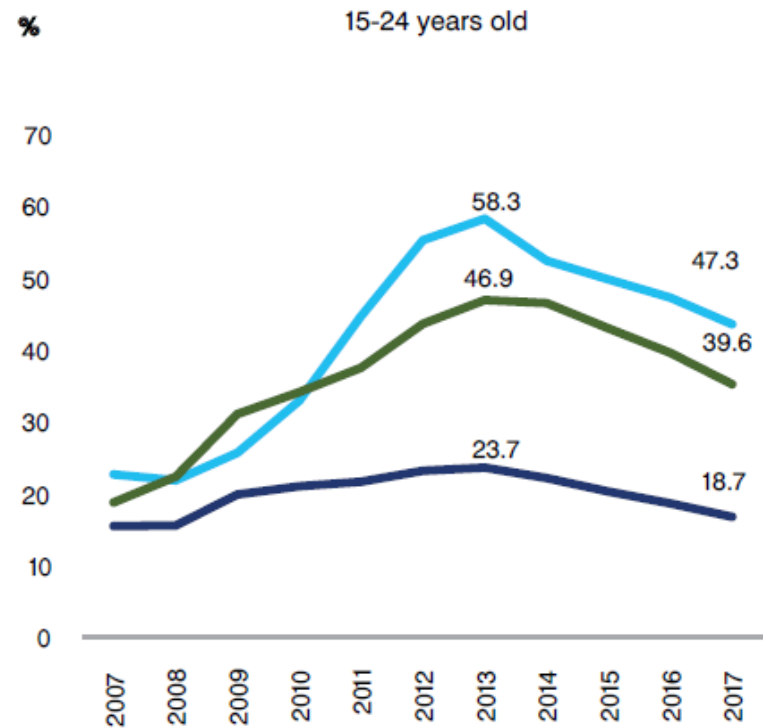
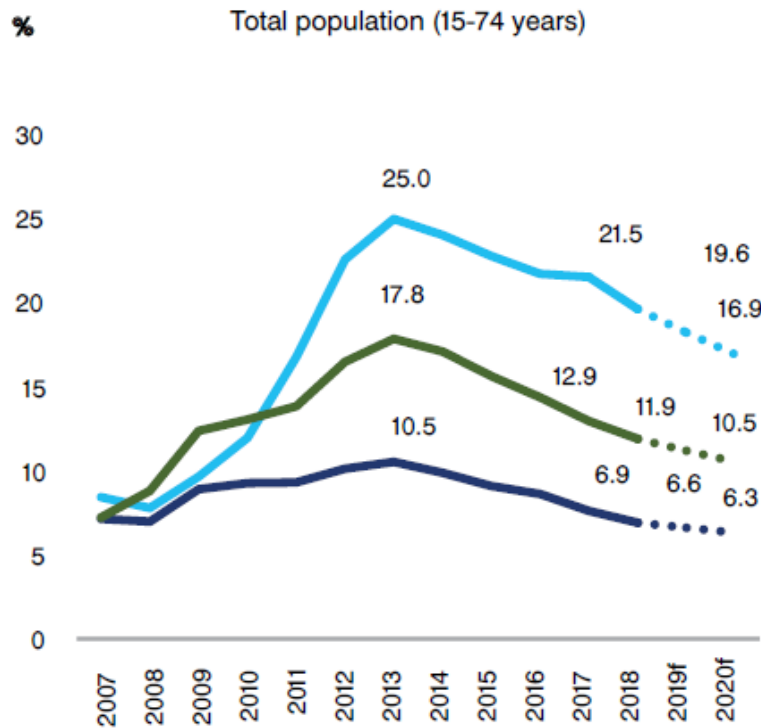
Cumulative GDP change Greece-EU28-EU southern countries



SOURCE: Eurostat, 2019, AMECO, European Commission, Winter 2019 Economic Forecast (February 2019), GDP Chain linked volumes 2010, data processing IOBE*Southern countries (Italy, Spain, Portugal), e-estimation, f-forecast

Unemployment rate

Greece-EU28-EU southern countries



SOURCE: Eurostat, 2018, AMECO 2018, European Commission, Autumn 2018 Economic Forecast, data processing IOBE. Southern countries (Italy, Spain, Portugal), f-forecast

Manufacturing contribution to GDP Greece vs EU

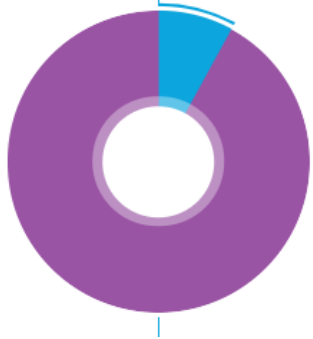


14,3%
EU GDP



20%
EU target (2020)

VS



8%
Greece's GDP



11,4%
(1995 level)



GDP : +12.8%
Employment : +12.7%
Revenues of public & SSF's : + 4.6 bn EUR/year

Greek Pharmaceutical Industry: An Overview

Exports to more than
85 countries worldwide

Contributes to the national GDP
€2.8 billion annually

Employees
directly 11,000 people

Indirectly supports 53,000 jobs in complementary industries



28 state-of-the-art production facilities

Full compliance with EMA and FDA GMPs quality standards

Use of cutting-edge technology

Highly skilled scientific personnel

Development and production of pharmaceuticals addressing all key therapeutic areas

Medicines ranking #2 most exported product of the Greek economy.

Generic medicines economic footprint in the EU



62%
OF DISPENSED
MEDICINES

29% **+**
OF PHARMACEUTICAL EXPENDITURES



-€100BN
LESS SPENDING
THROUGH GENERIC COMPETITION

+350 
MANUFACTURING SITES
IN THE EU



HIGH QUALITY MEDICINES
TO OVER
500 MILLIONS
PATIENTS

Cardiovascular | Hypertension
Diabetes | Depression
Epilepsy | Mental disorder
Gastro-intestinal



+100% PATIENT ACCESS
OVER 10 YEARS

+160,000
EMPLOYEES



UP TO
17%
R&D INVESTMENT
OF TURNOVER



Value added medicines



Value added medicines Rethink, reinvent & optimise medicines

How



DRUG REPOSITIONING
Finding new indications



DRUG REFORMULATION
New delivery system



COMPLEX COMBINATION
New regimens
or adding technology

What's in it for

PATIENTS



BETTER
ADHERENCE AND
QUALITY OF LIFE

HEALTHCARE PROFESSIONALS



IMPROVED SAFETY
AND EFFICIENCY



INCREASED
TREATMENT
OPTIONS

PAYERS



IMPROVED
BUDGET
EFFICIENCY

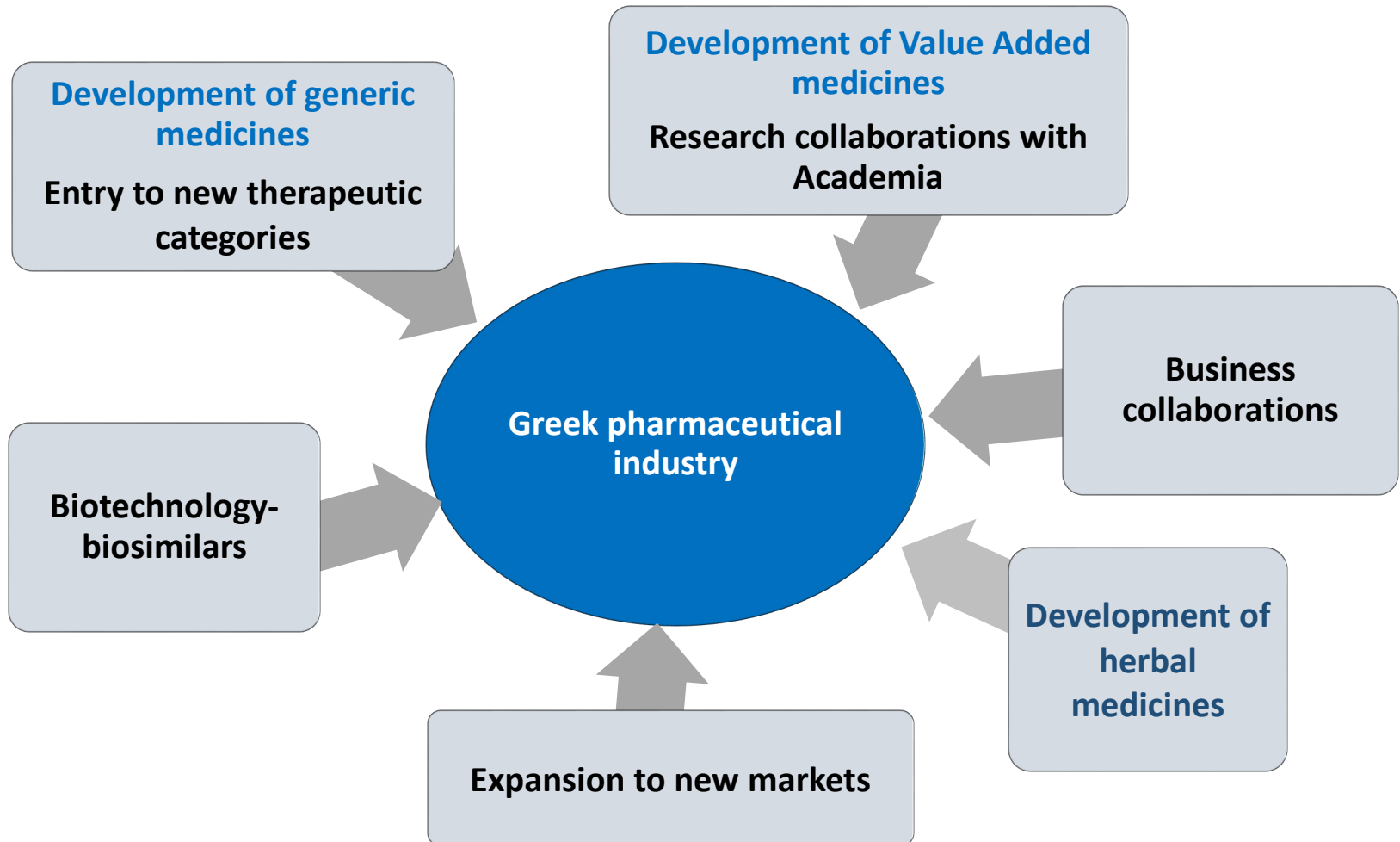
RESEARCHERS



INNOVATION THROUGHOUT
A MOLECULE'S LIFECYCLE

patients • quality • value • sustainability • partnership

Opportunities and areas of interest





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Back up

A roadmap for development

Extroversion

- Strengthening presence on international markets
- Entry to new markets
- Full use of the productive potential

Investments

- Research Development and Innovation
- Quality Assurance Systems
- Investments in human resources

Specialization

- Generics and Value-Added medicines
- Innovative production methods
- Supplementary business activities

Collaboration

- Among Greek pharmaceutical companies
- With pharmaceutical companies abroad
- With research institutions both in Greece and abroad