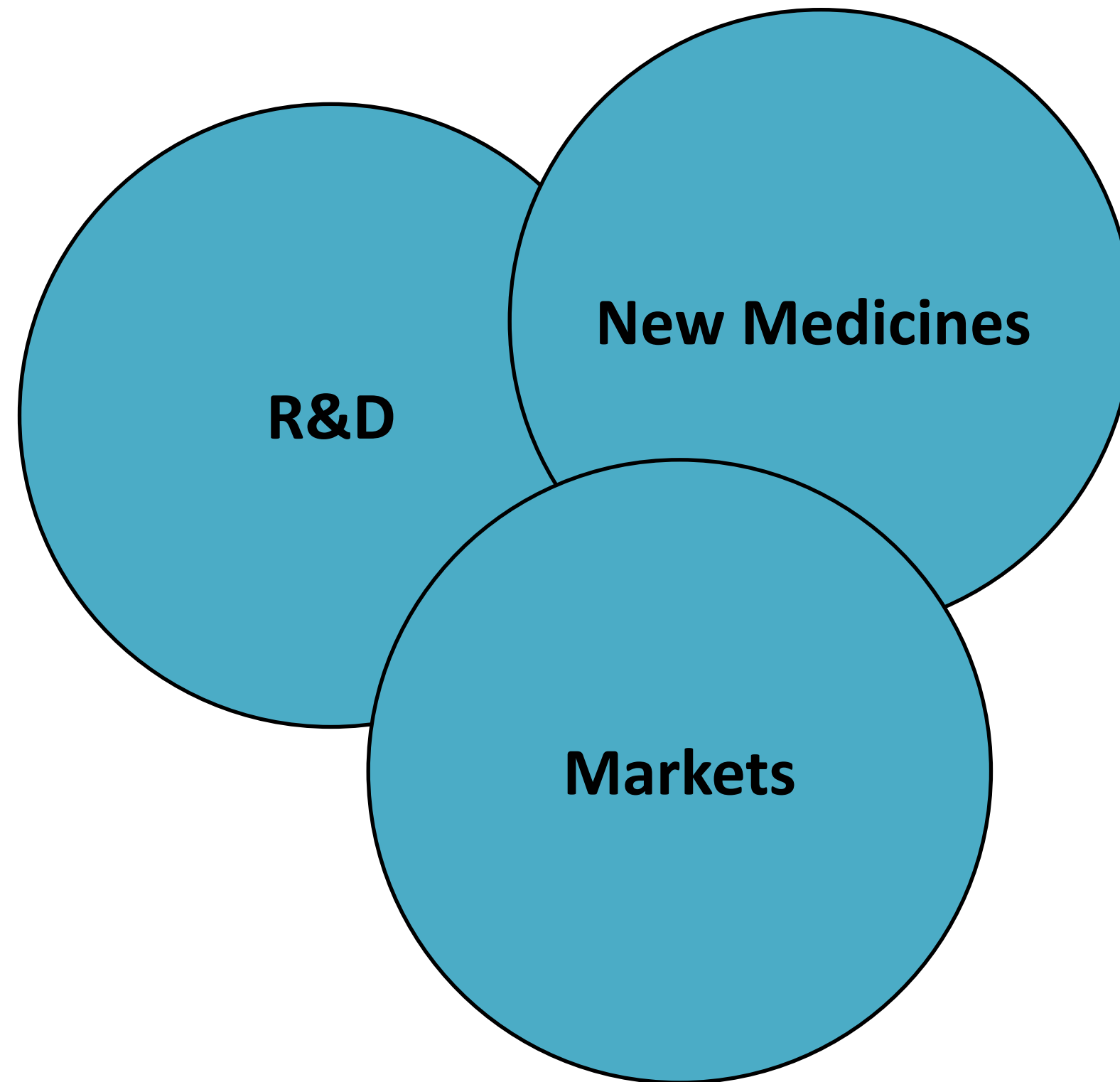


"As políticas adotadas pelo governo americano e a situação geopolítica mundial podem oferecer vantagens competitivas para o Brasil?"

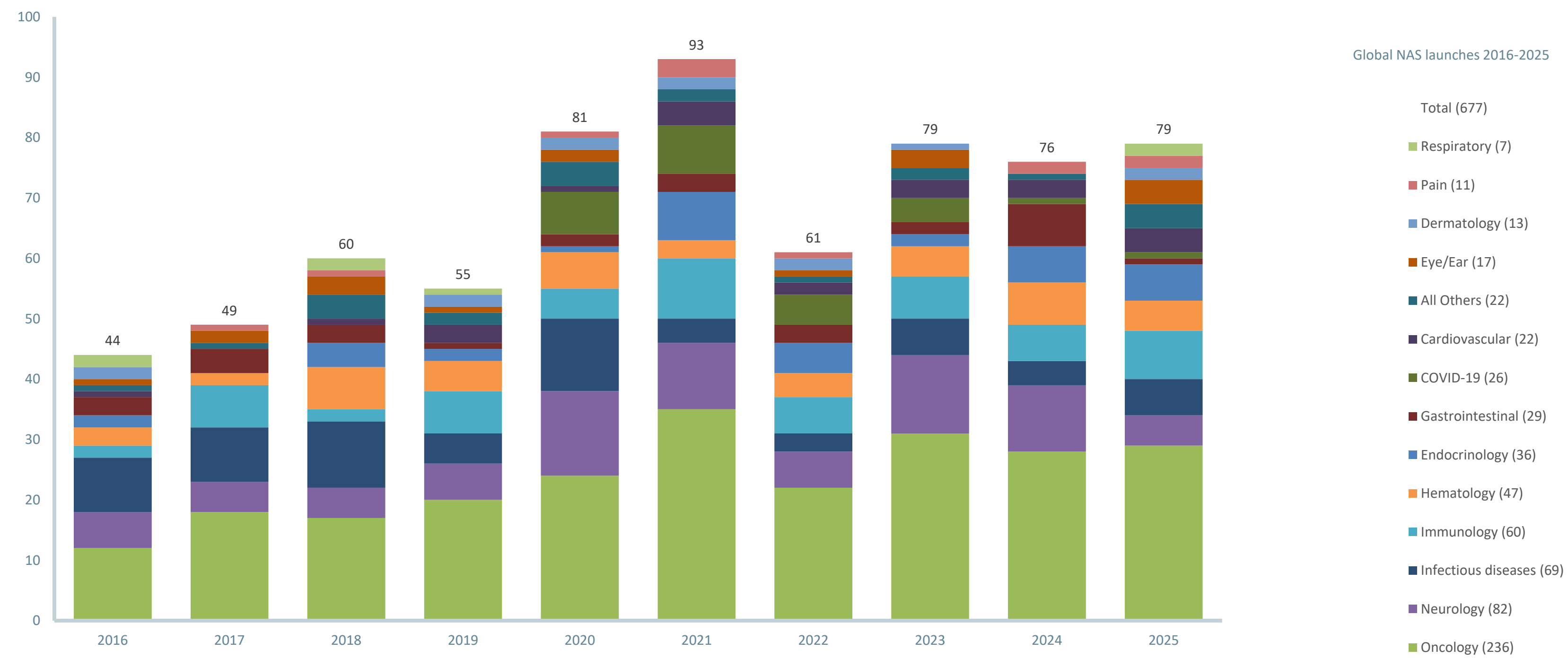
Life Sciences in Transition: Outlook to 2030



A total of 677 novel active substances (NAS) have been launched globally over the past decade



Novel active substances (NAS) launched globally by therapy area, 2016–2025

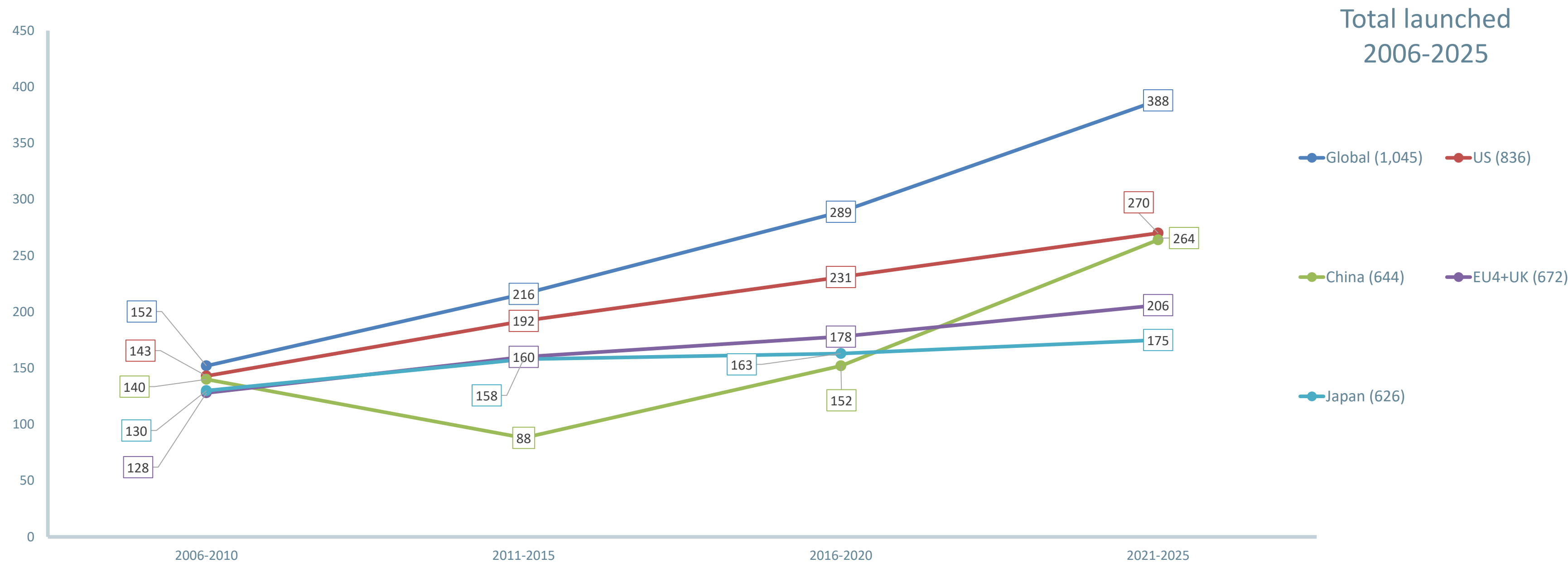


Source: IQVIA Institute, Feb 2026.
Report: Global R&D Trends 2026. IQVIA Institute for Human Data Science.

The launch and availability of NAS across key regions has become more uneven since 2010



Novel active substances (NAS) launched globally and in selected countries, 2006–2025

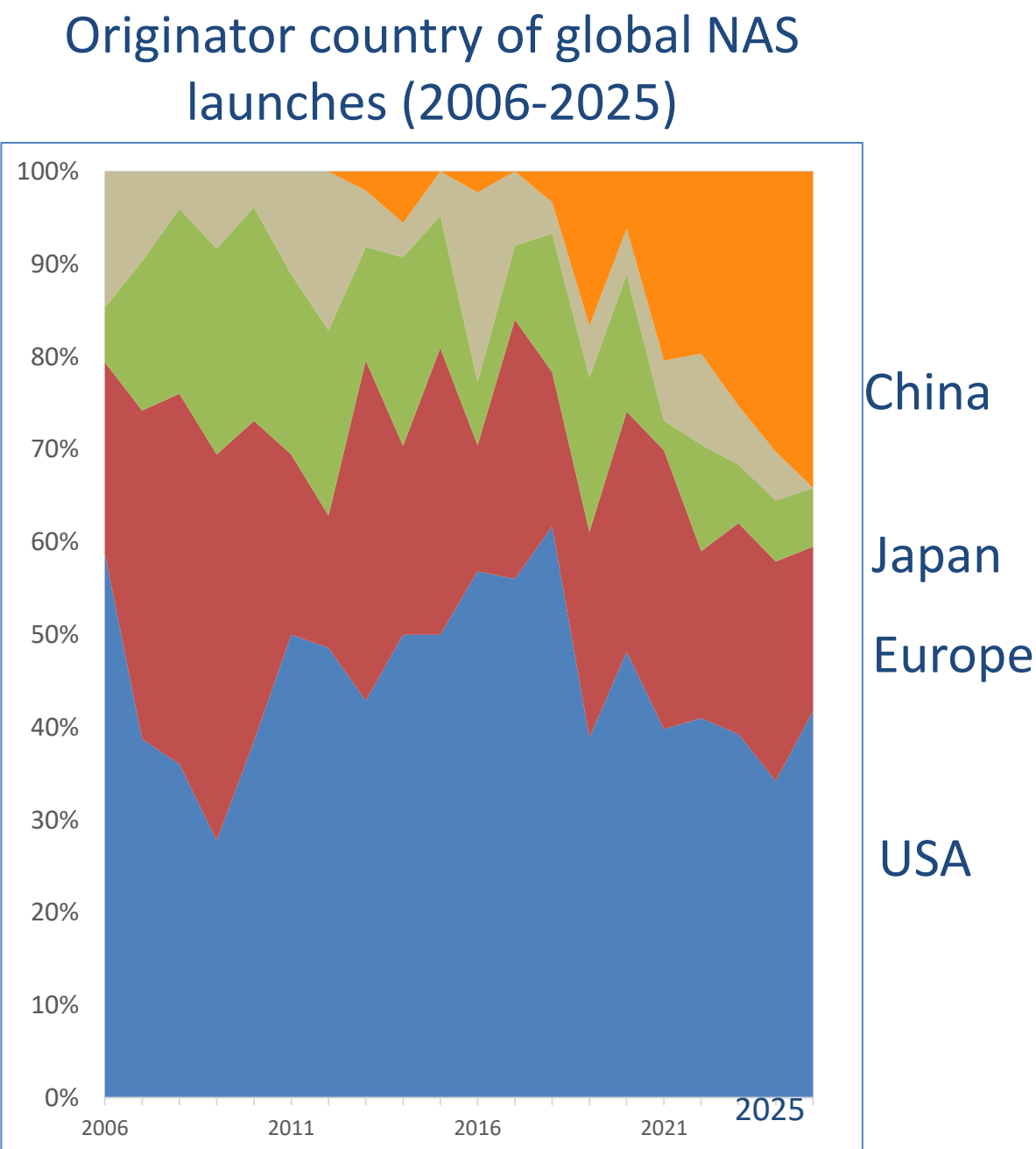
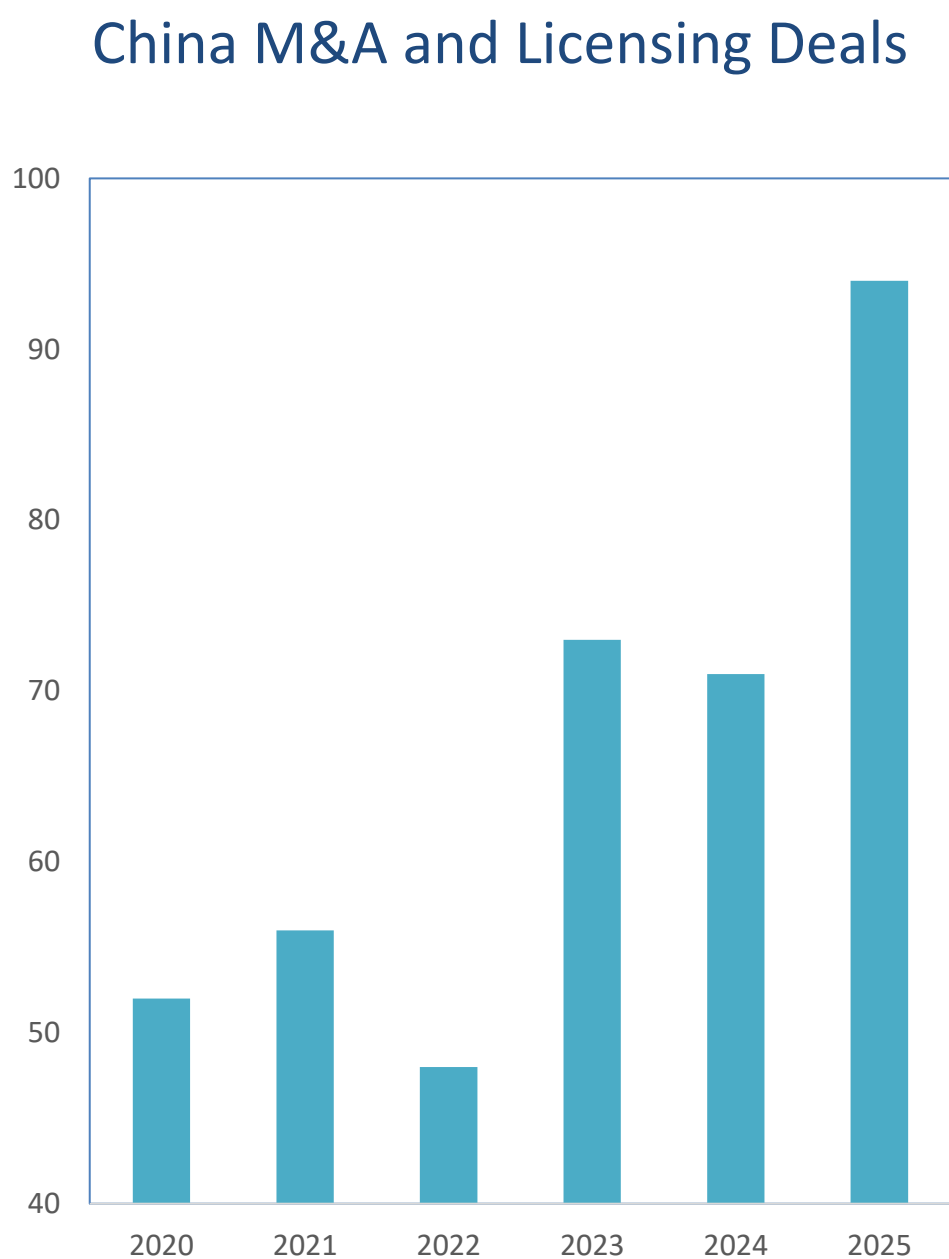
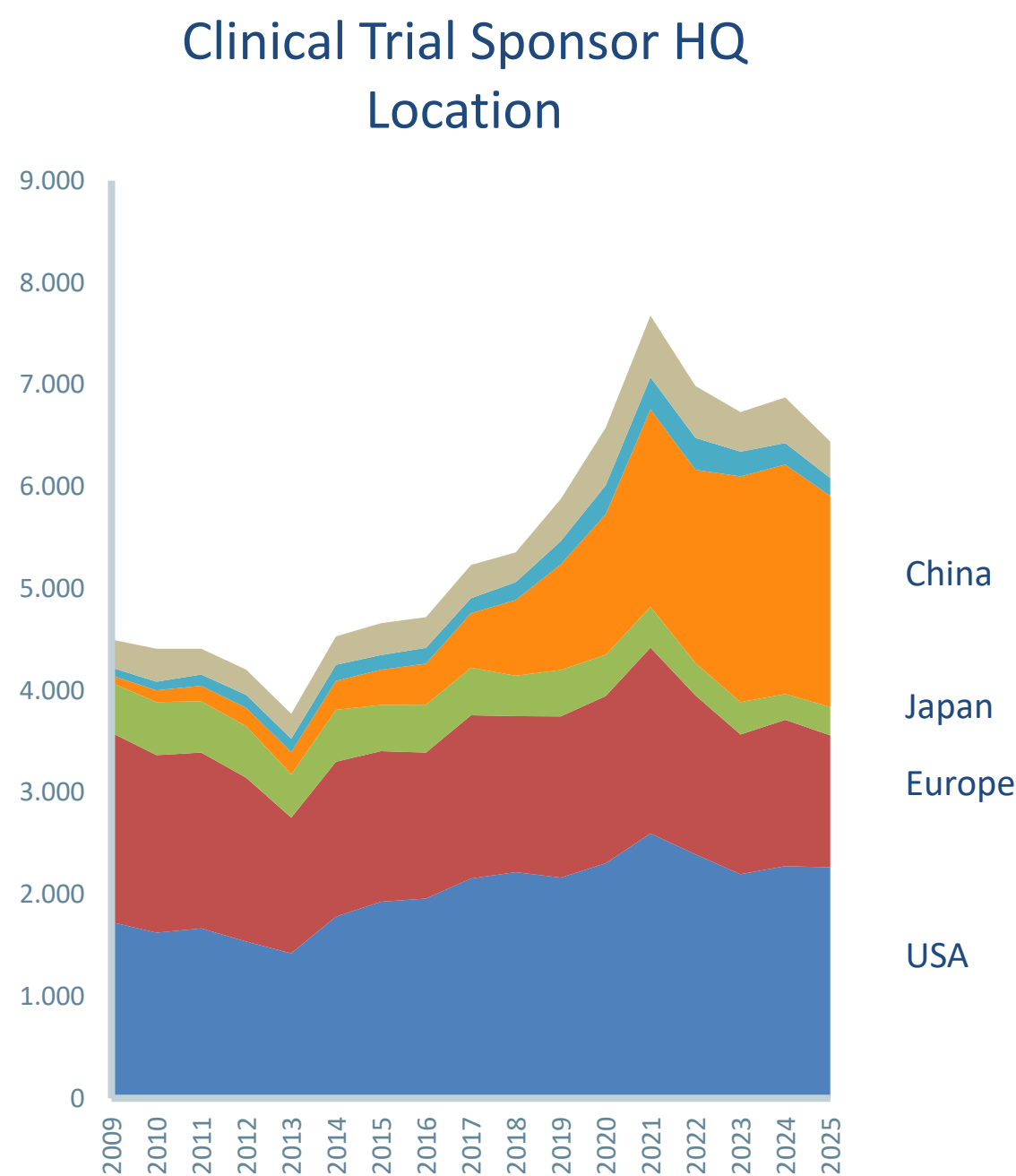


Source: IQVIA Institute, Feb 2026.
Report: Global R&D Trends 2026. IQVIA Institute for Human Data Science.

China's innovation ecosystem is maturing and now represents a major global center of activity



Maturing of China's innovation ecosystem, including trial activity, deal-making, NAS launches, and first-in-class mechanism approvals

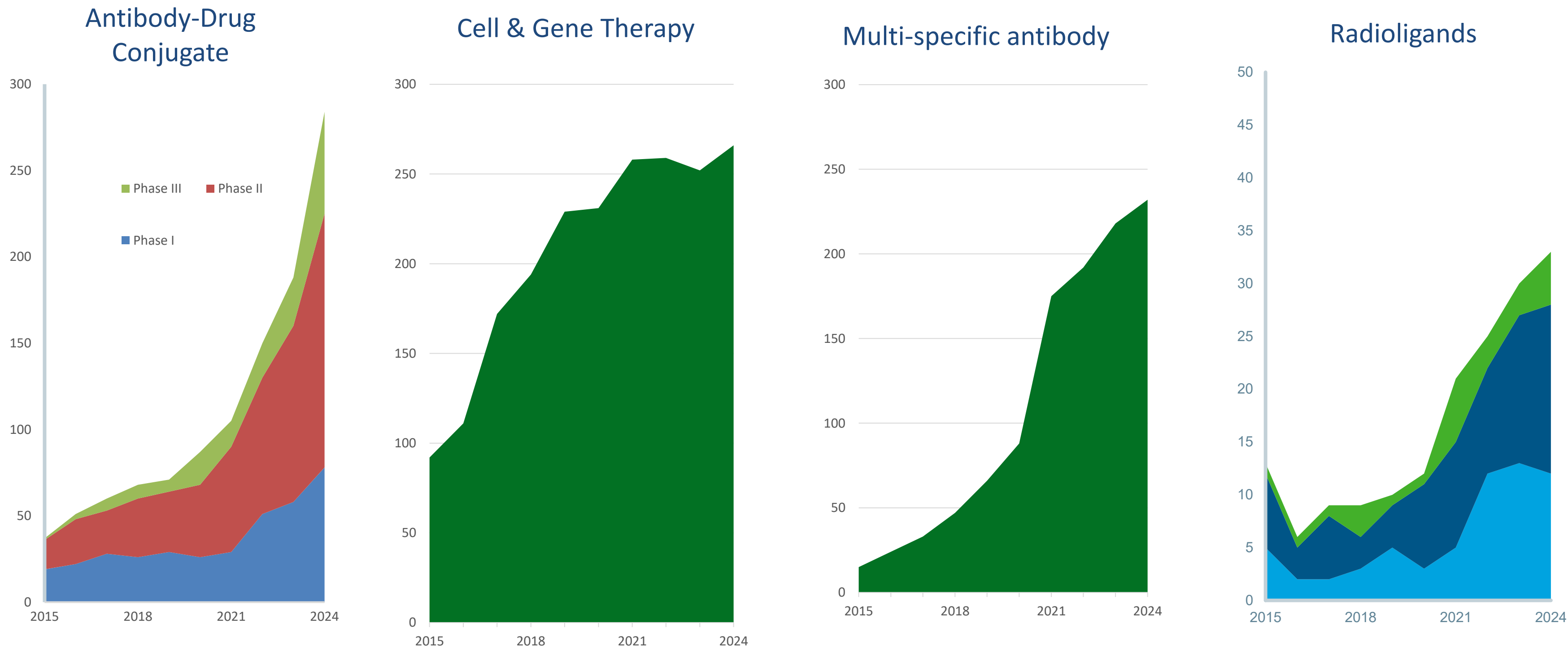


Source: IQVIA Institute, Feb 2026.
Report: Global R&D Trends 2026. IQVIA Institute for Human Data Science.

The pipeline of new medicines is increasingly biologic, complex, precise and requires advanced diagnostics



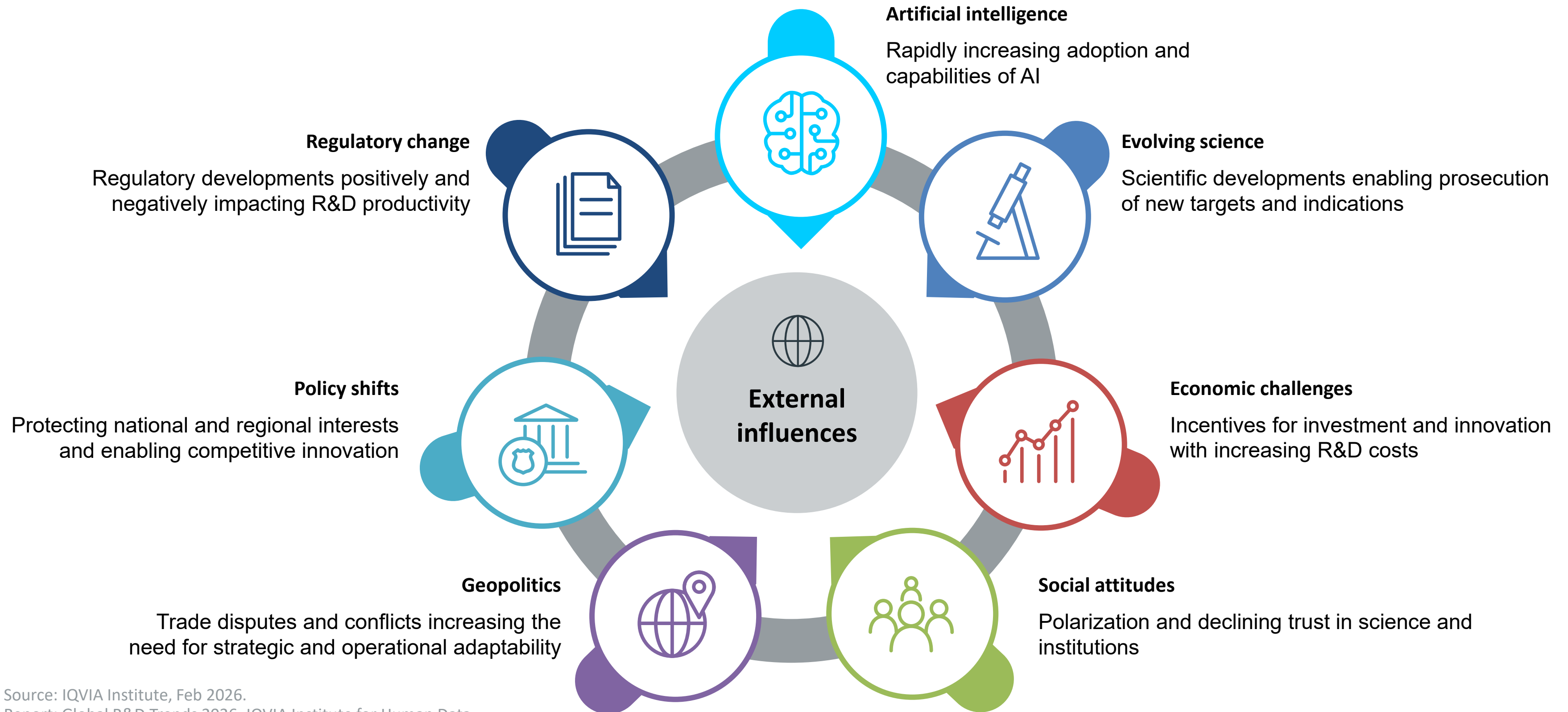
Clinical trial starts by modality 2015-24 for industry-sponsored interventional trials



Source: Citeline Trialtrove, Jan 2025; IQVIA Institute, Apr 2025.

A complex and challenging external ecosystem is evolving and places new and different pressures on R&D stakeholders

Geopolitics, policy shifts, economic pressures and other dynamics at play affecting R&D stakeholders



Efforts by countries to increase their clinical trial competitiveness are intensifying

Timelines, incentives aimed at key enablers of country selection

- Governments around the globe are competing to attract investment and innovation, including clinical trial placement.
- Policies focus on key enablers of country selection: Availability of regulatory advice, start-up speed, site productivity/patient access, commercial value.

Australia's Time and Cost Advantages


Notification system, commercialised Ethics Review reduce timelines; tax grants incentivise companies conducting Phase I trials in Australia.

Expedited Pathways in China


NMPA now offers a 30-day pathway prioritizing review and resources for some innovative drug INDs with plans to initiate trials in 12 weeks.

UK Clinical Research Reform, 150 Day Mission


Streamline regulations, reduce time from approval to recruitment, Phase I 14-day pilot for regulatory approval.


Fast EU/Biotech Act to Accelerate CT applications

Reduce administrative delay, simplify submission requirements, centralise review.

Country Level Phase I Timeline Incentives in EU


Spain, Belgium, Germany among EU countries giving 'mono-country' Phase I trials preferential, accelerated timelines


US FDA Policies to Speed Development

Active effort by commissioner to reduce time to FIH and streamline evidence generation


Market Incentives for Significant Country Inclusion

Germany offers preferential drug pricing if ≥ 5% of global trial patients recruited in Germany. Addresses concern of small contributions requiring similar system start up resources.

PMDA Targeted Scientific Advice

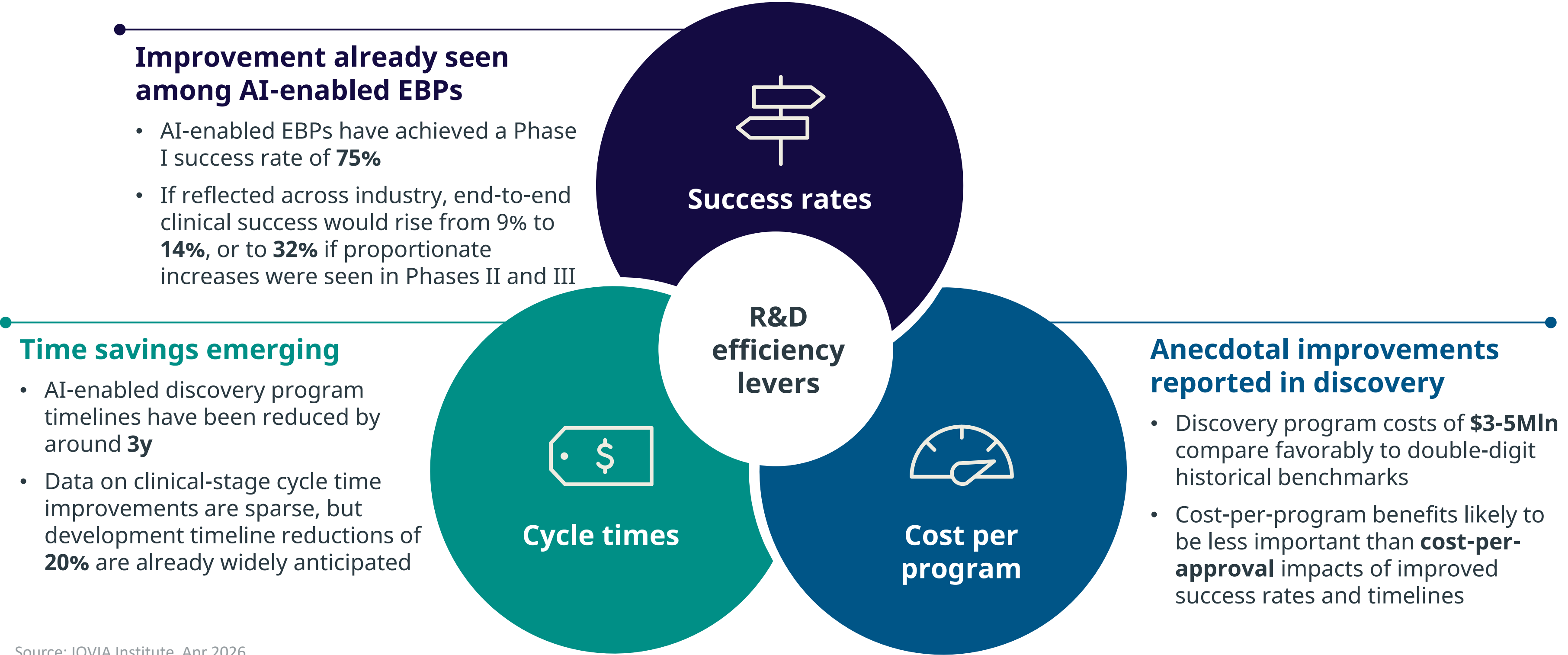

for early-stage companies

EU Biotech Act Incentivizes Trials through Longer Exclusivity


Supplemental Protection Certificates (SPCs) could be extended for certain medicinal products developed on the basis of two or more clinical trials in the EU.

AI platforms bring the promise of transformative improvement in R&D efficiency if broadly and successfully adopted

Summary of achieved and anticipated improvements shared by biopharmaceutical companies

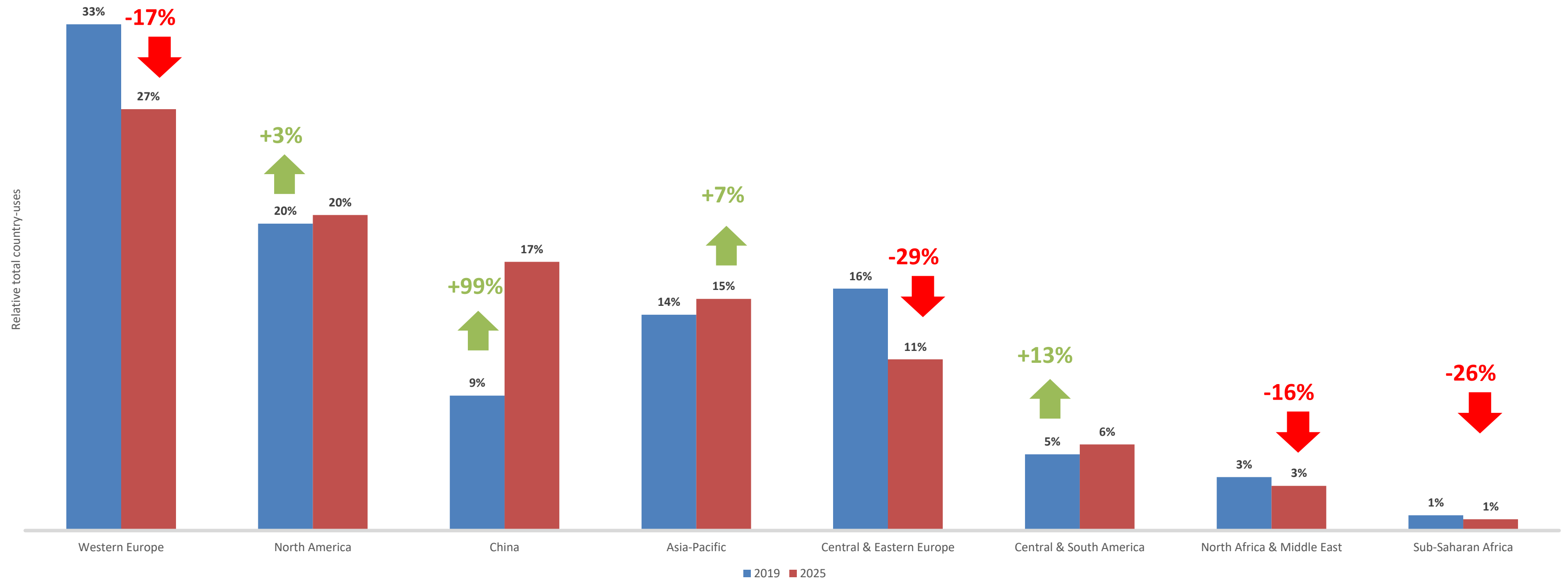


Source: IQVIA Institute, Apr 2026.

Clinical trial country utilization has shifted significantly since the pandemic and become increasingly concentrated in U.S. and China



Country utilization as percentage of global trial country-uses, 2019 and 2025

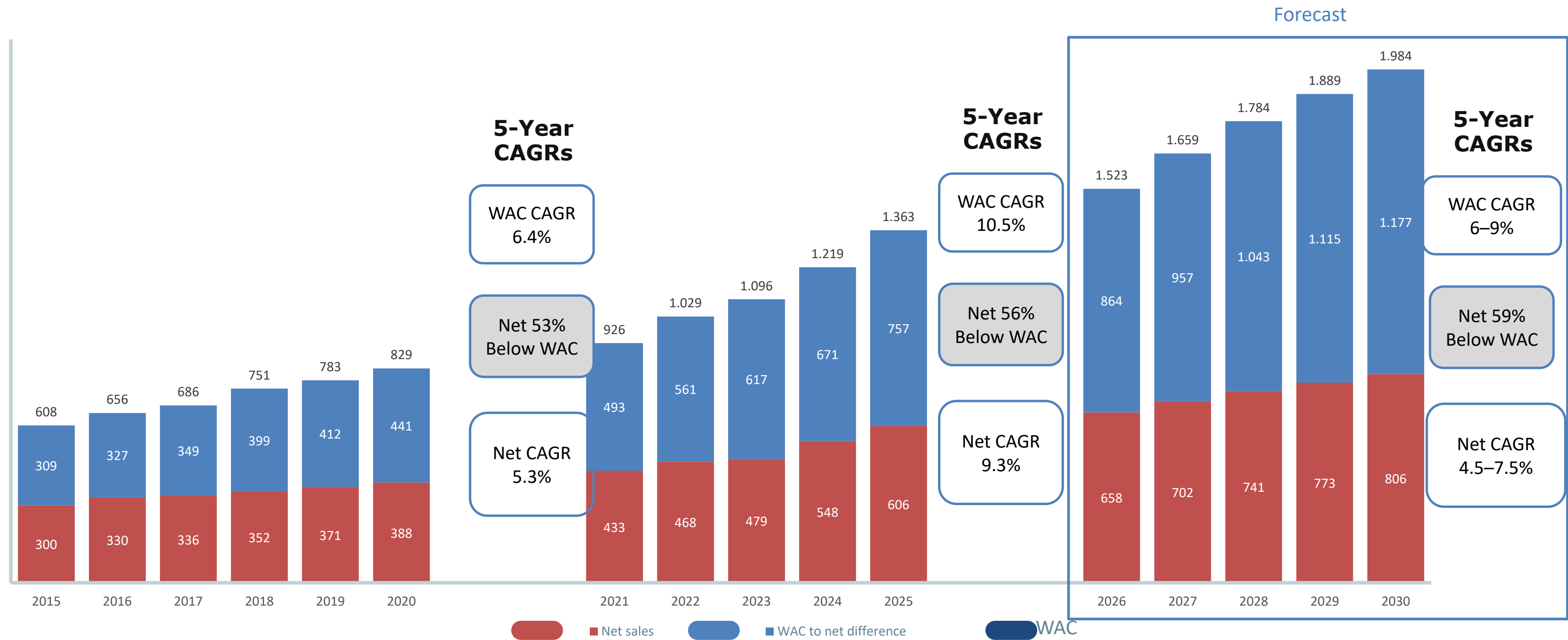


Source: Citeline Trialtrove, Jan 2026; IQVIA Institute, Feb 2026.
Report: Global R&D Trends 2026. IQVIA Institute for Human Data Science.

U.S. market grew by 9.3% CAGR over the past 5 years on a net price basis, but expected to slow to 4.5-7.5% through 2030



U.S. medicine spending at list prices (WAC) and estimated net manufacturer prices, 2015–2030, US\$Bn



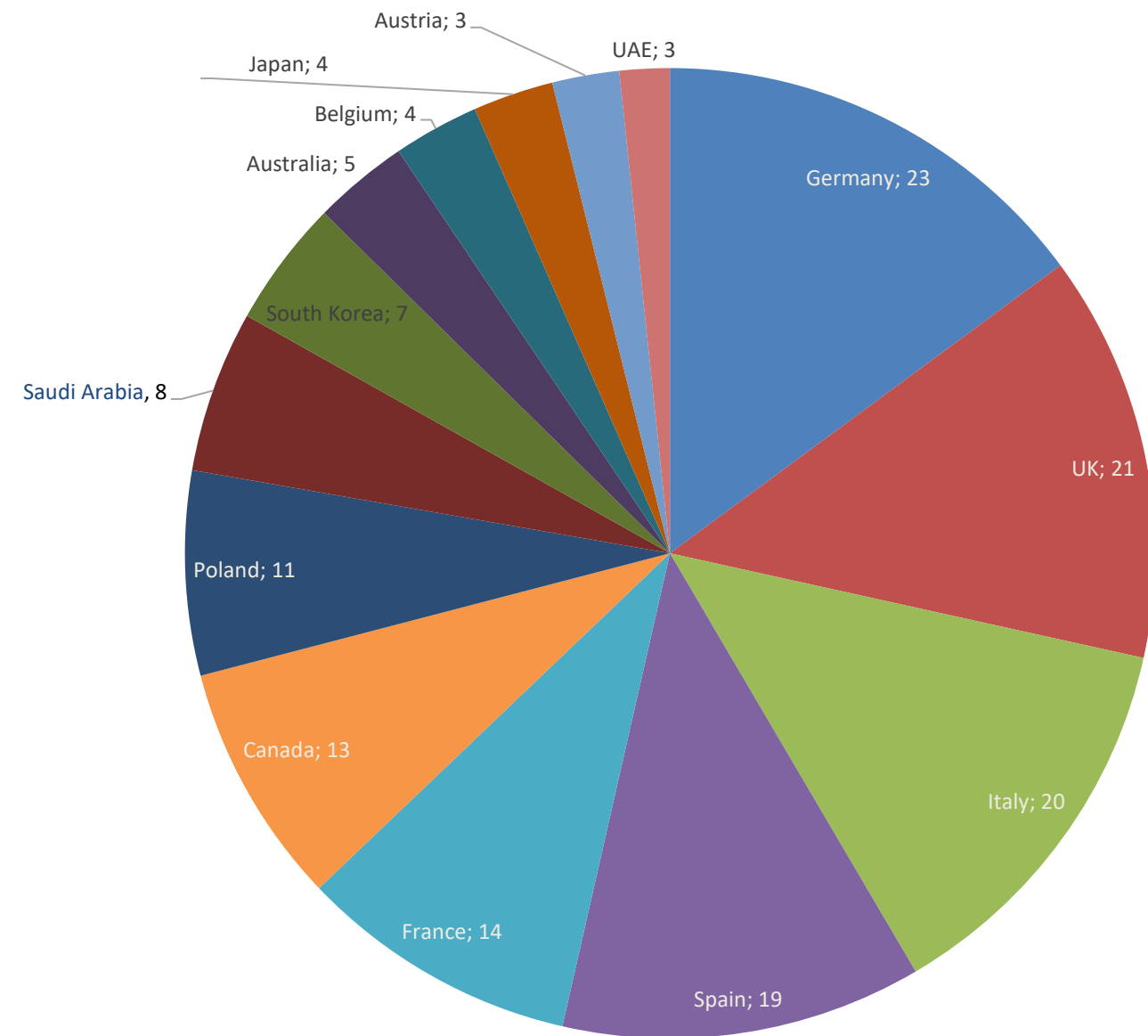
Source: IQVIA Institute, Apr 2026.

In addition to the U.S., a mix of 12 developed and pharmerging countries will each contribute over \$10Bn in growth to 2030

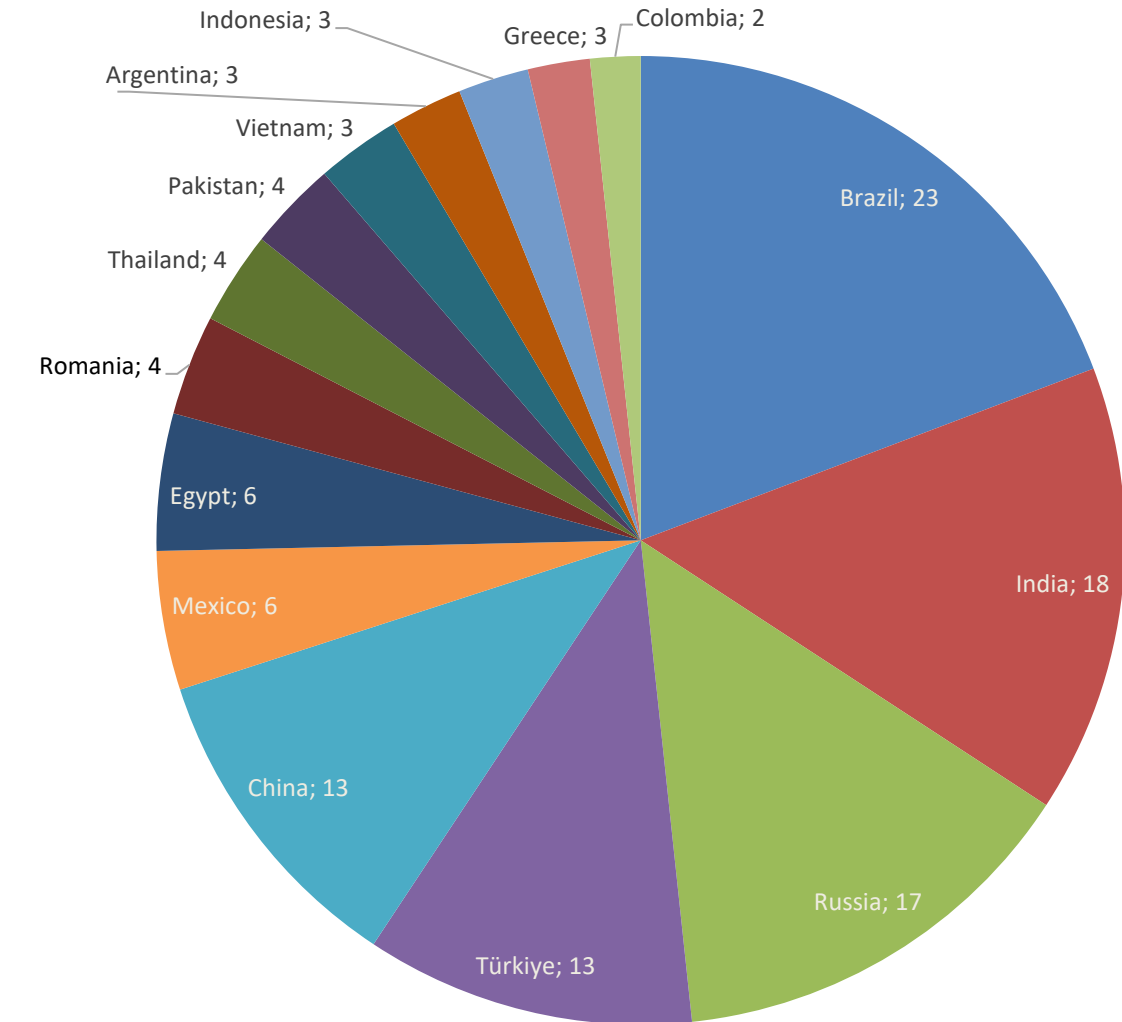
High growth developed and Pharmerging markets spending growth, const US\$, 2026–2030



High growth developed markets, growth 2026-2030 \$155.1Bn



Pharmerging markets, growth 2026-2030 \$120.8 Bn

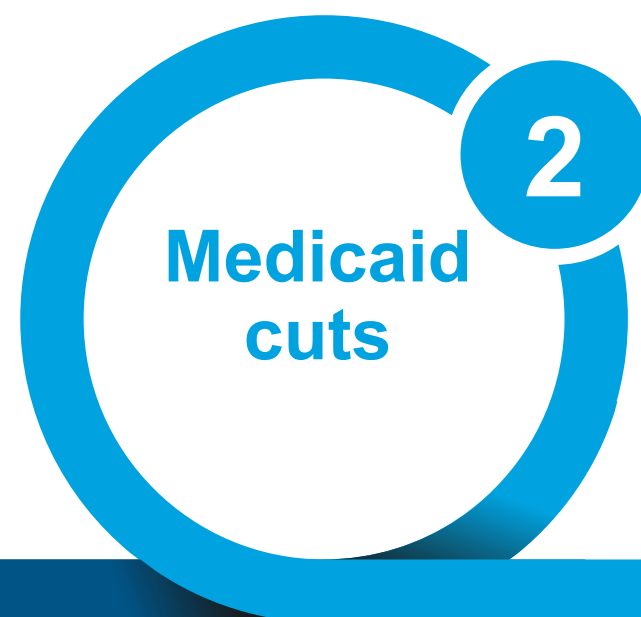


Source: IQVIA Market Prognosis, Sep 2025; IQVIA Institute, Dec 2025.

The Global Use of Medicines 2026: Outlook to 2030. Report by the IQVIA Institute for Human Data Science.

U.S. policy changes impacting spending and use of medicines are beginning to have clearer impacts

U.S. policy changes expected to impact medicine use and spending through 2030



- Part D benefit redesign shifts liabilities from CMS to payers/manufacturers
- Patient costs capped starting at \$2,000 per year in 2025 (adjusted for inflation annually)
- Drug price negotiation for high-cost high-spend older brands without competition
- Inflation rebates for prices above inflation

- Medicaid cuts of over \$1 trillion over 10 years
- Enrollment cuts, expanded work requirements
- Expected variation in impacts across states

- Most-favored nation price policies including company agreements related to pricing and manufacturing sites
- Tariffs including drugs and reciprocal trade agreements negotiated with multiple countries

- Industry voluntary price cuts
- Direct to consumer access via TrumpRx.gov and industry sites

"As políticas adotadas pelo governo americano e a situação geopolítica mundial podem oferecer vantagens competitivas para o Brasil?"

Do ponto de vista de **Research & Development Solutions (RDS)**:

- Patrocinadores estão priorizando programas com maior diferencial clínico e valor econômico.
- Existe pressão crescente para acelerar desenvolvimento clínico e demonstrar valor real para pagadores.
- Estudos em áreas de alta necessidade médica (oncologia, neurologia, imunologia e obesidade) continuam recebendo investimentos relevantes.
- Ganhos de produtividade, uso de IA e redução dos prazos regulatórios tornam-se ainda mais importantes para compensar as pressões de preço geradas.

“Como o Brasil se prepara relativo a recursos humanos, implementação de novas tecnologia, regulamentação e segurança jurídica?”



Obrigado



APONTE SEU CELULAR PARA ENVIAR
PERGUNTAS AO PALESTRANTE



18/09/2026