

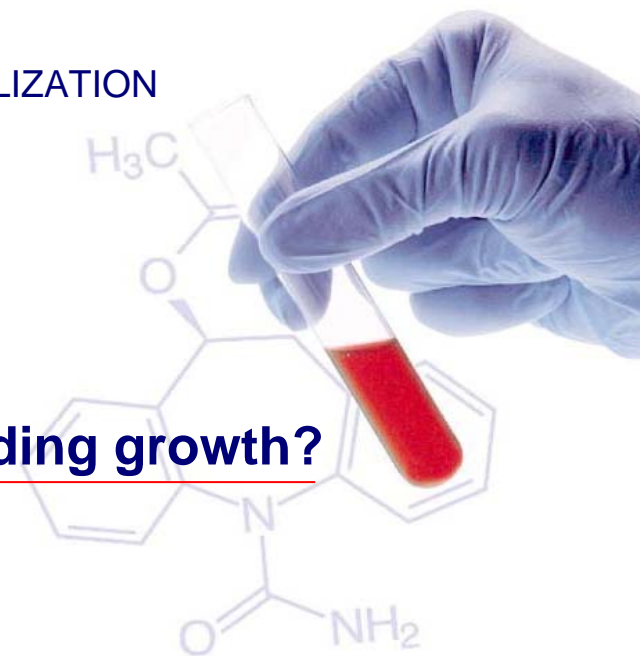


## PORTUGAL AND THE CHALLENGES OF GLOBALIZATION

Is Portugal moving towards an export-leading growth?

Bial's experience

Luís Portela



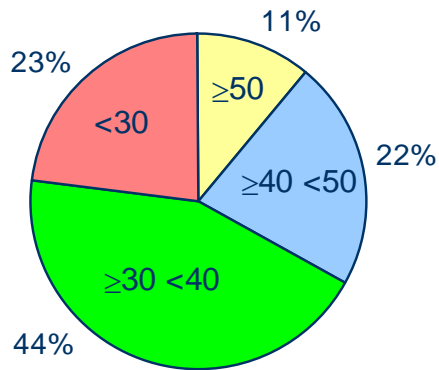
## Founded in 1924



## Human Resources

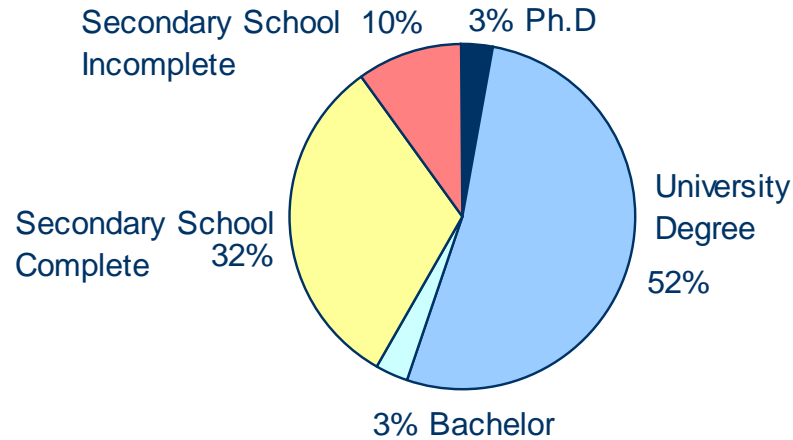
660 employees

**AGE STRUCTURE**

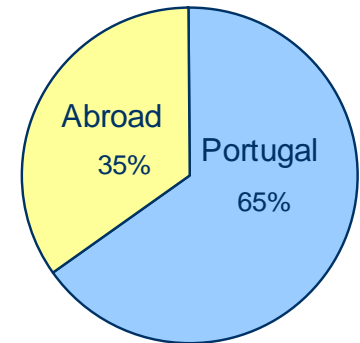


Average age = 37,3 years old

**QUALIFICATIONS**



**LOCATION**



## BIAL in the World

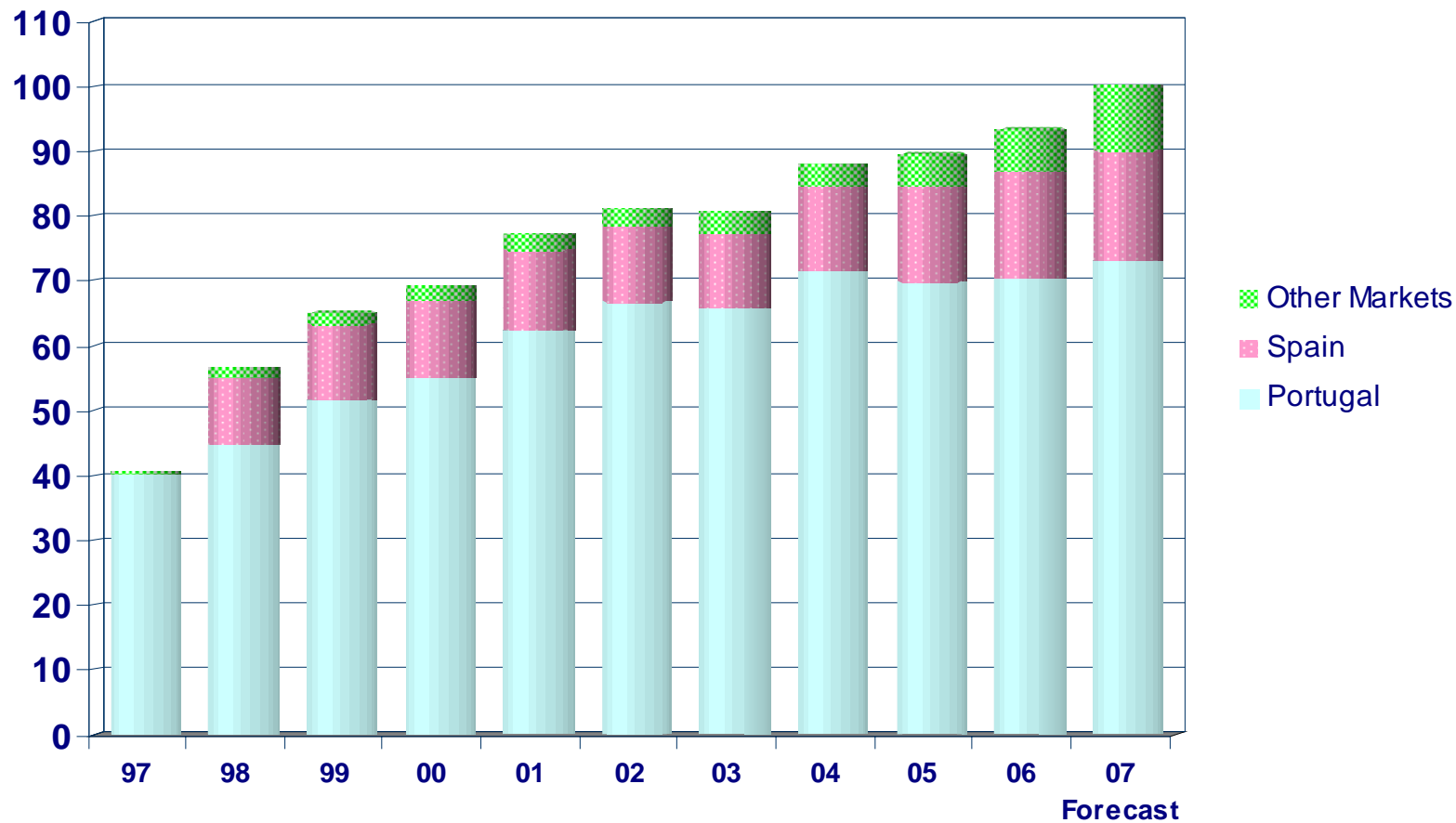


Local company  
Local marketing  
Export

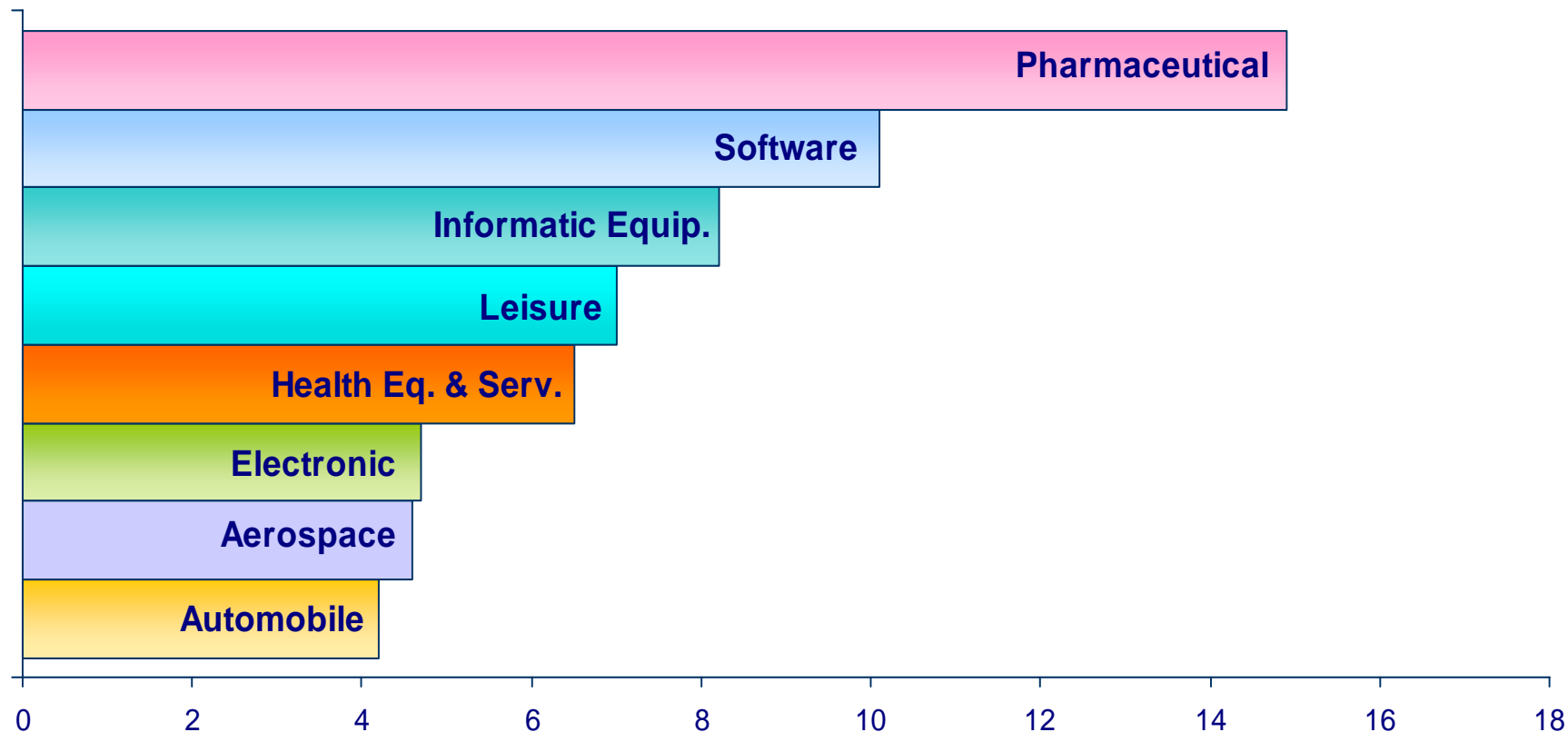
## BIAL's Sales Group

1997 - 2007

M EUR

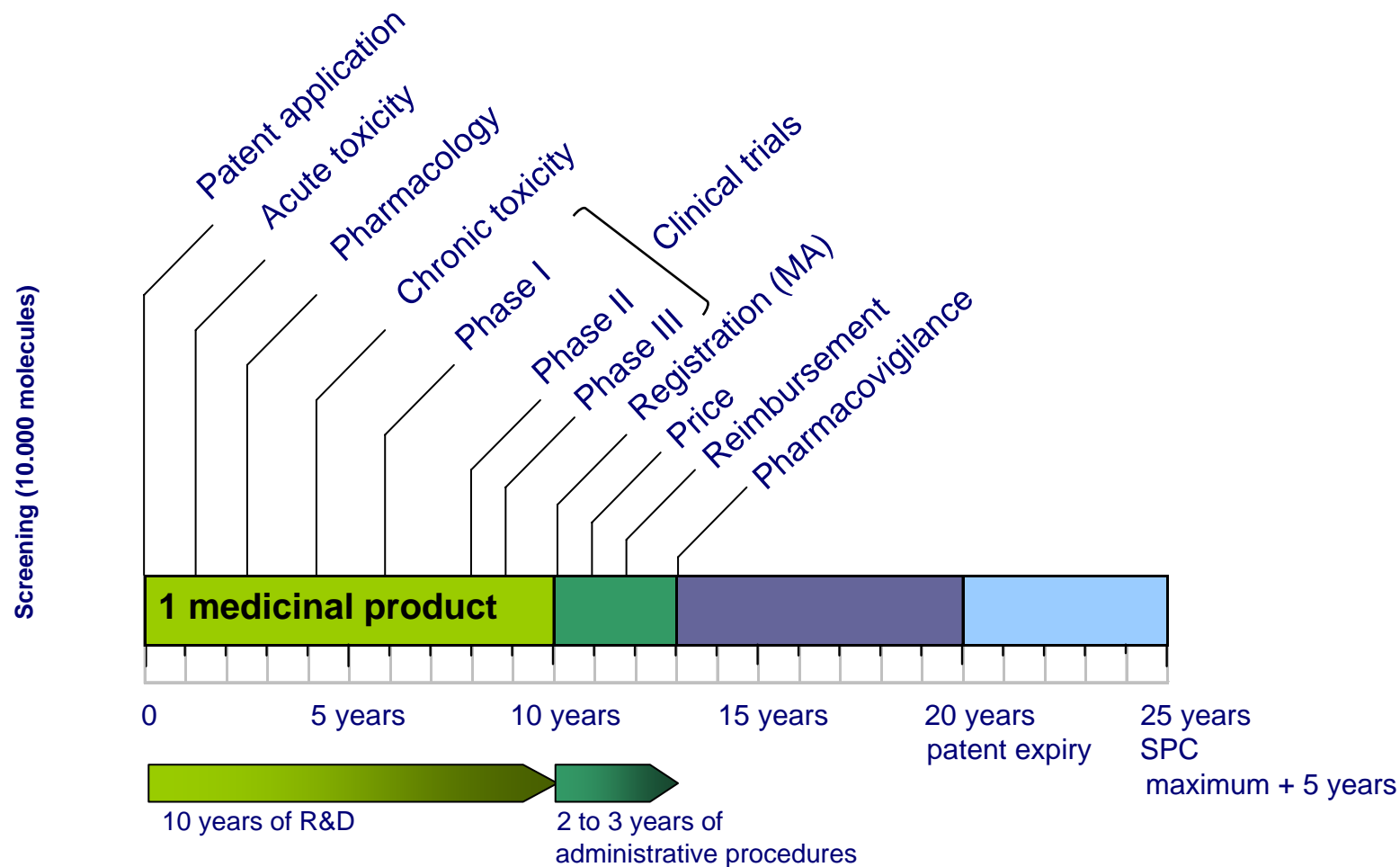


## R&D investment as percentage of sales, 2005



Source: The Pharmaceutical Industry in Figures, 2007 update, EFPIA.

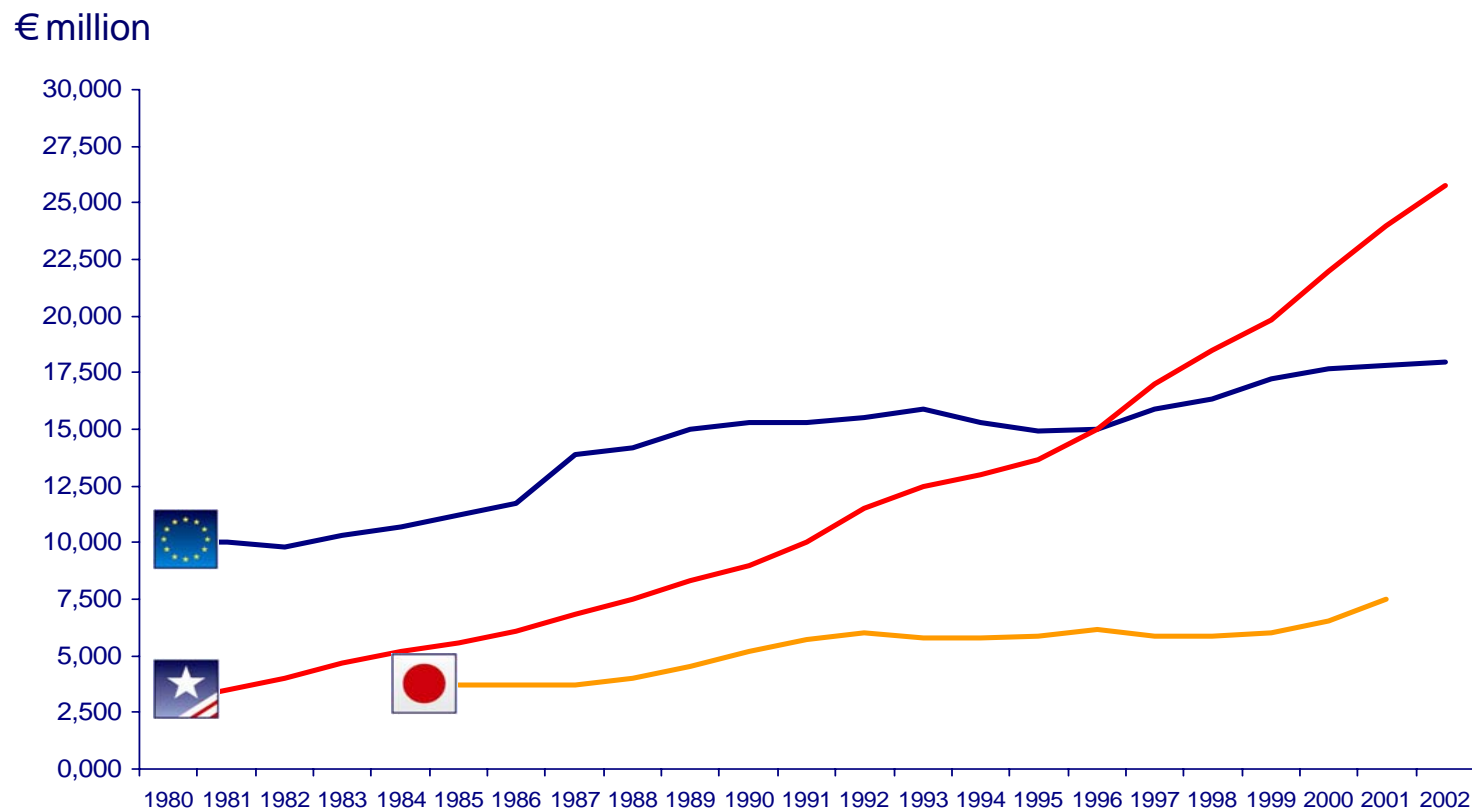
## Phases of the R&D process for a medicinal product



Source: AGIM, Recherche et Vie.

## Pharmaceutical R&D expenditure

(adjusted for inflation, 2000 = 100)



Source: Charles River Associates, 2004.

## New active substances introduced in the market, 1990-2006

Country	Nº Products	Companies (present)
United Kingdom	54	GSK, Shire, Encysive
Germany	41	Bayer-Schering, Boehringer, Merck-Serono
France	28	Sanofi-Aventis, Servier, Ipsen
Italy	15	Menarini, Sigma Tau, Recordati, Chiesi
Spain	13	Almirall, Esteve, Faes, Ferrer, Uriach, Salvat
Denmark	12	Novo Nordisk, Nycomed, Lundbeck
Netherlands	9	Organon
Sweden	8	AstraZeneca
Ireland	5	Elan
Finland	3	Orion
Belgium	2	UCB, Solvay
Austria	1	
Latvia	1	Institute of Microbiology and Urology
<b>TOTAL EU</b>	<b>192</b>	<b>29</b>
USA	245	Pfizer, J&J, MSD, Abbott, Wyeth, BMS, Lilly, Amgen, Schering-Plough, Genzyme Corp., Watson, Sepracor, Celgene Corp., Amylin Pharm, MGI Pharma, Biomarin, NPS Pharma, Insmed
Japan	144	Takeda, Daiichi-Sankyo, Astellas, Eisai, Shionogi, Otsuka, Tanabe, Kyowa, Ono, Dainippon-Sumitomo, Mitsubishi, Kayaku, Shinyaku, Meiji Seika
Switzerland	48	Roche, Novartis
Others	22	Teva, Douglas, Burkwang, Allofarm, Dong A
<b>TOTAL</b>	<b>651</b>	<b>68</b>

Sources: SCRIP Annual Review, 1991-2003 and IMS.

## BIAL's Mission in R&D

Searching for new therapeutic solutions

- Neurological diseases
  - Cardiovascular diseases
  - Allergic diseases
- Porto
- Bilbao

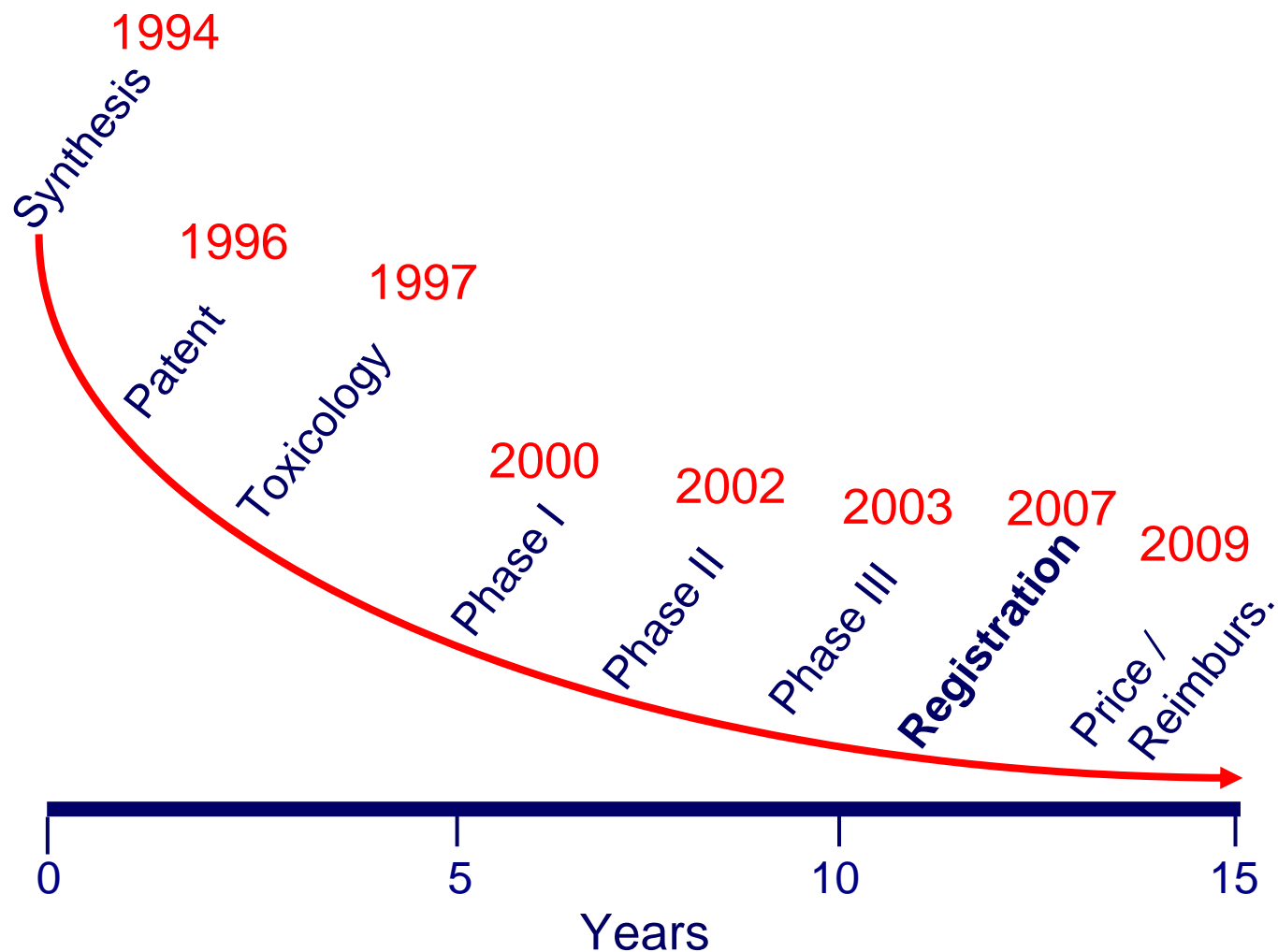


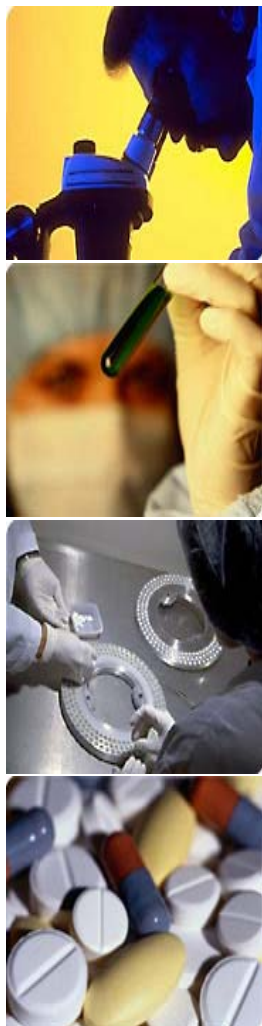
## **BIAL's R&D structure**

- 87 people (19 Ph.D) / 7 nationalities
- Contracts with 66 R&D institutions (1993-2007)
- > € 20.000.000 / year
- $\simeq$  10.000 new molecules (1993-2007)
- 6 new medicines

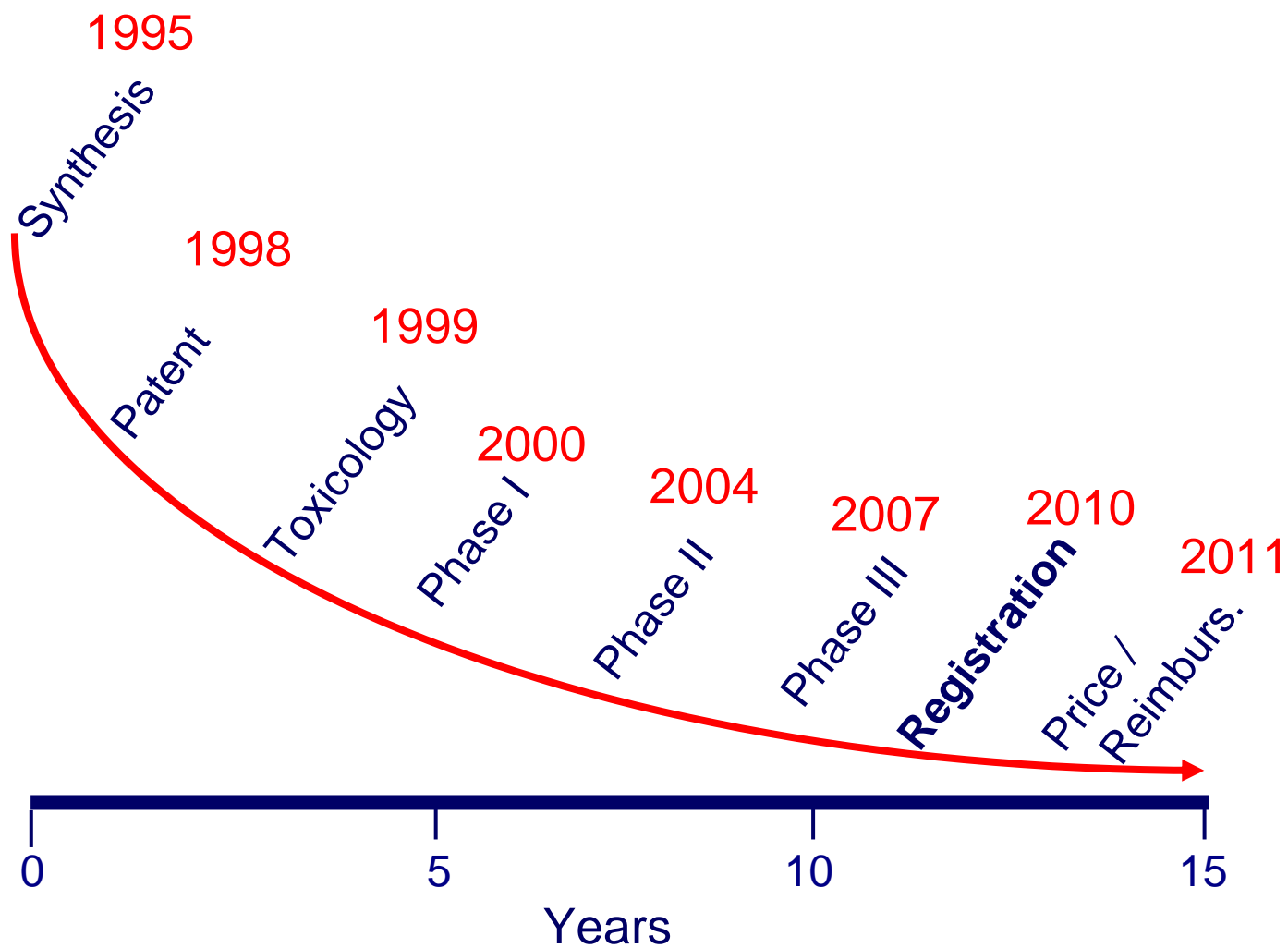


## ANTIEPILEPTIC ESLICARBAZEPINE ACETATE





## ANTIPARKINSONIAN NEBICAPONE



## **Health Cluster for Competitiveness and Technology**

**(under establishment)**

- BIAL
- IPATIMUP, IBMC & INEB (I3S)
- GDMF – Medical Device and Pharmaceutical Group
- INL – International Iberian Institute of Nanotechnologies
- IMM – Institute of Molecular Medicine
- CNC – Centre for Neuroscience and Cell Biology
- Hovione
- University of Porto and University of Minho
- CCDR-N – North Regional Coordination and Development Commission



## PORTUGAL AND THE CHALLENGES OF GLOBALIZATION

Is Portugal moving towards an export-leading growth?

Bial's experience

[luis.portela@bial.com](mailto:luis.portela@bial.com)

[www.bial.com](http://www.bial.com)

