Welcome

by
Robert Arendal,
Chairman,
The Cool Chain Association

The Cool Pharma Program

October 15th - Wednesday

1400	Welcome by CCA Chairman Robert Arendal
1415-1545	Session 1 - Presentation "IATA's Time and Temperature Task Force", by Eric Raemdonck, IATA
1545-1615	Session 2 - Presentation "Risk Management in Cool Chains" by Margriet Franke, Germanischer Lloyd
1615	Coffee break
1630-1700	Session 3 - Panel Discussion and Presentations
	"Temperature controlled transportation of pharmaceuticals" by Peter Claessens, Panalpina - Michael Vorwerk, LifeConEx - Ingo Ocklenburg, Bayer HealthCare
1700	End of day one
1900	RKN - Cocktail
2000	Gala-Dinner At the Hotel "Jardin St Roch"

The Cool Pharma Program

October 16th - Thursday

0900-0930	Session 4 - Presentation "Pharma transportation – view of the airline" by Stavros Evangelakakis, Cargolux
0930-1030	Session 5 - Panel discussion "Cooperation CCA and the Pharmaceutical Industry" by Stavros Evangelakakis
1030-1230	Workshop 1 - CO2 Emissions - Project ,
	Workshop 2 - PPECB project "Improving the shelf-life"
	Workshop 3 - Technology group/Cargo2000
1230	Lunch Break
1330-1430	Workshop 4 - Workshop Conclusions
1430-1530	Session 6 - Panel discussion about Presentations and Workshop Conclusions
1530	Coffee break
1600-1700	Session 7 - Presentation "Cold Chain Management of Vaccine Manufacturer" by Sebastian Wins of GSK
1700	Wrap up and End of the Conference

The objectives of this meeting

- "To keep the world moving" despite a major "global" financial crisis! – ? and most likely a recession!
- To review the handling and transportation requirements of the Pharmaceutical Industry and evaluate if the CCA's CCQI Master Tables can used as a global standard for the logistics of the PTSP industry!
- To evaluate how the CCA can be of assistance to the pharmaceutical industry in general.
- And network and listen to the views and opinions of everybody.
- With the result that we can walk away from this workshop with a plan and ideas how to improve the logistics of the PTSP Industry.

The Global Pharmaceutical Industry

- Growth in pharmaceutical sales has been strong over the years; from $ 298 billion in 1998 to $ 602 billion in 2005; strongest in North America (12.6% per year) compared to 9.3% in Europe and 2.9% in Japan.
- North America accounts for the largest proportion of the world market (45%), followed by Europe (23%).
- PWC estimates that worlds pharmaceutical sales shall reach $ 1.3 trillion by 2020.
- OECD states that the manufacturing trade average annual growth (1994-2003) of pharmaceuticals was almost 14% (the highest of all manufacturing products) compared to around 6% (?) for all other manufacturing.

Global Pharmaceutical Industry Facts and Figures

MEDICINES Australia
Better Health through Research and Innovation

As at July 2007

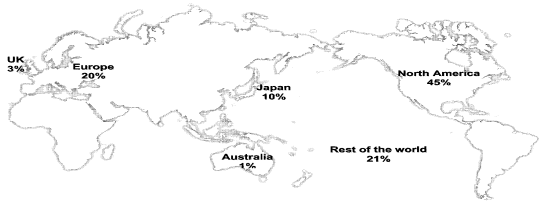
World market value and share

- In 2005, global pharmaceutical sales totalled US$602 billion with growth of 7% from the previous year.[1]

- Growth in pharmaceutical sales has been strongest in North America since 1998 (12.6% per year) compared to 9.3% in Europe and 2.9% in Japan.[2]
- North America accounts for the largest proportion of the world market (45%) and Europe (including the UK) accounts for 23% of total global sales.[3]
- Australia represents 1% of the global pharmaceutical market.[4]

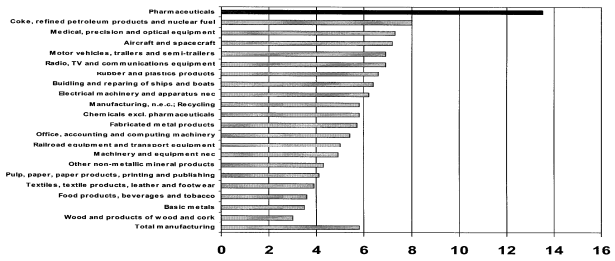
[1] IMS Health, February 2006. *Intelligence 360 Global Pharmaceutical Perspectives.*
[2] Office of Fair Trading (UK), February 2007. *The Pharmaceutical Price Regulation Scheme Market Study, Annexe D Global overview of the pharmaceutical industry.* Available: http://www.oft.gov.uk/shared_oft/reports/comp_policy/oft885d.pdf. [Accessed 7 May 2007].
[3] IMS Health MIDAS, 2007.
[4] IMS Health MIDAS, 2007.

Share of global market (sales)[5]



[5] IMS Health MIDAS, 2007.

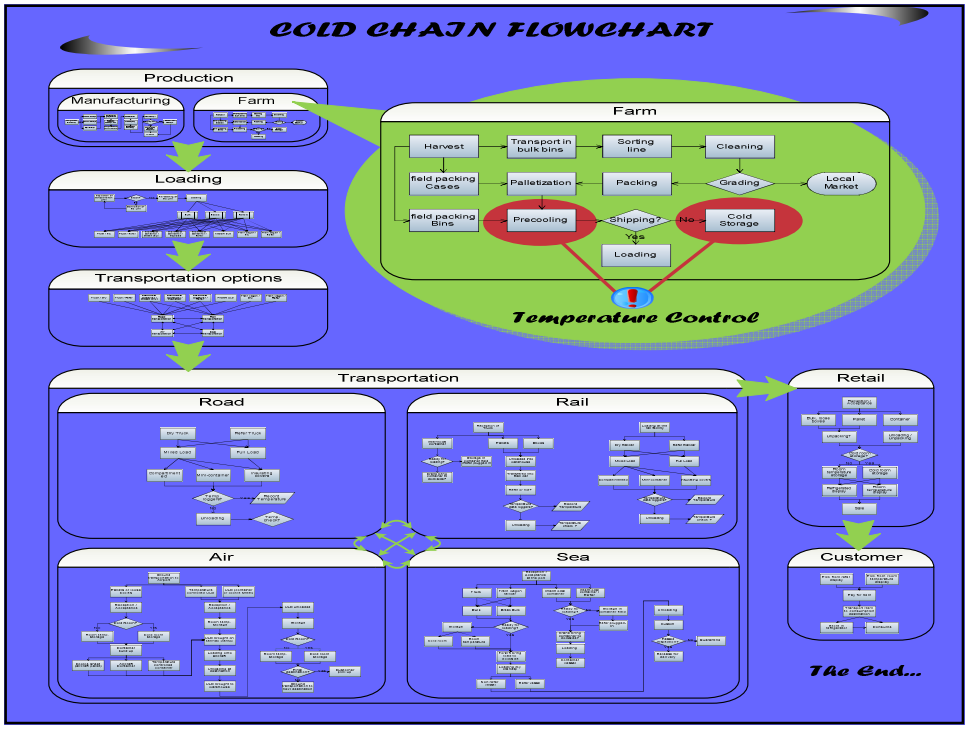
OECD manufacturing trade average annual growth (%) 1994-2003[14]

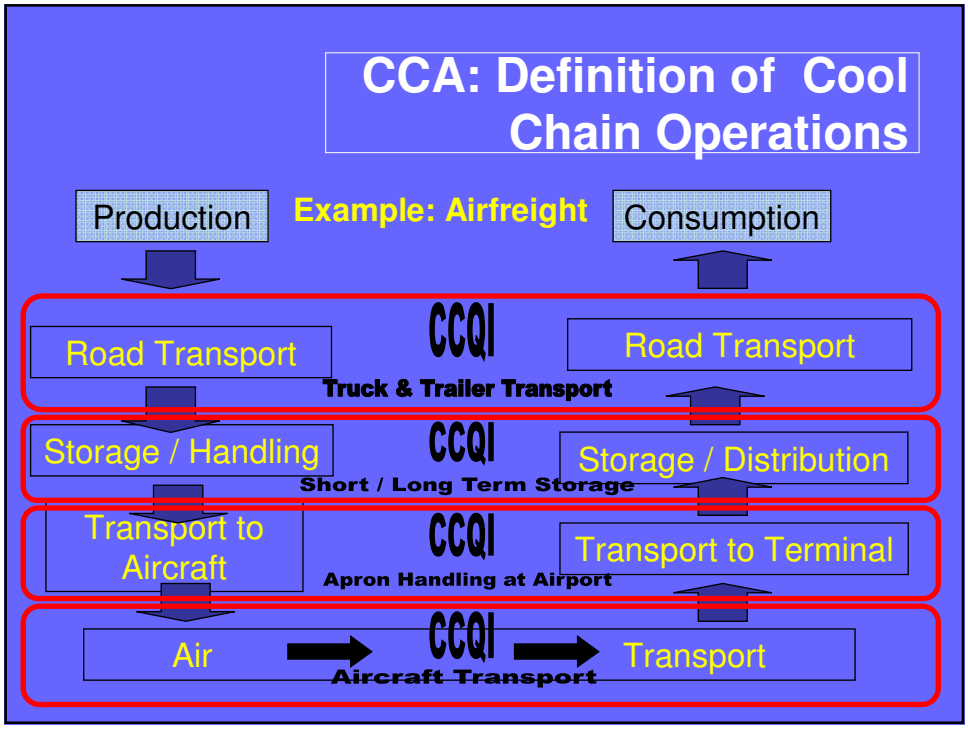


[14] OECD, 2005. *Science and Technology Industry Scoreboard 2005.* Paris, pp 206.

The Future of the Global Pharmaceutical Industry

- But the Pharmaceutical Industry needs further quality improvements in the handling and transportation of the pharma products (unbroken cool chain, careful handling, more transparency in the logistic process etc).
- To reach that quality level of service (certainly not an impossible task), the industry needs “logistic standards” – similar to the requirements in the “Perishable Industry”.
- Consequently, why not consider the CCA CCQI Master Tables for the Pharmaceutical Industry?





"QUALITY IS NOT A COINCIDENT

–

IT'S THE RESULT OF AN INTELLIGENT DECISION"

Thank you