



JAME-Pharma

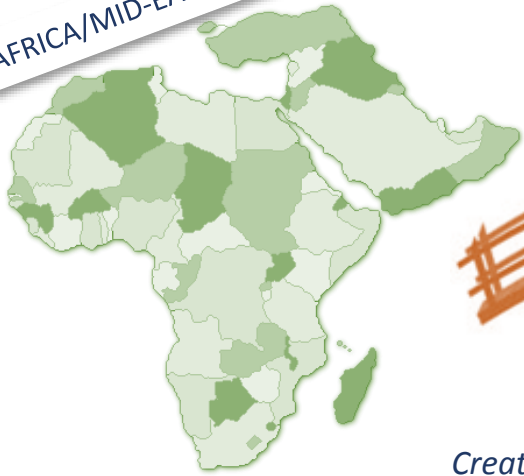
*Your Best Partner for Technology Transfer to
Africa & Mid-East (AME)*

1.

JAME-Pharma

- ◆ JAME-Pharma aims to extend Japanese pharma technologies to Africa & Mid-East (AME) for better human health.
- ◆ Our objective is to serve as a technical, regulatory and logistics bridge between Japanese companies and their counterparts in AME.

AFRICA/MID-EAST (AME)



Creating a technical, regulatory & logistics bridge between Japan and AME

2.

Africa

Mid-East

- Countries: 54
- Population: 1.2 billion (2016)
- Regions: 5
- Business language: English, French, Arabic

- Countries: 17
- Population: 450 million (2016)
- Regions: Transcontinental
- Business language: English, Arabic



AME

- Countries: 71
- Population: 1.65 billion (2016)
- Population: 1.95 billion (2025)



- Northern Africa
- Western Africa
- Middle Africa
- Eastern Africa
- Southern Africa



** United Nation Publications

** World Bank statistics

3.

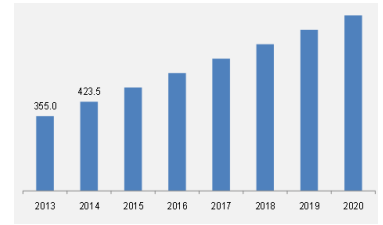
Why Africa/Mid-East ?



- Expanding Economies [\$2.6 trillion by 2020]



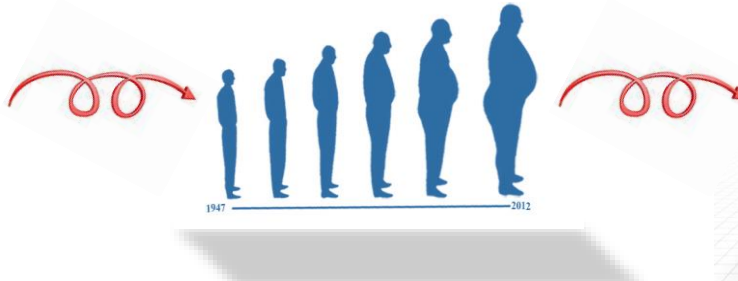
- Growing Pharma Market [\$65 billion by 2020]



- Strong Pharma Growth [10 ~12% through 2030]



- Increased Individual Wealth [Rising middle-class: 65% by 2020]



- Rise in Lifestyle Diseases [Cardiovascular , metabolic]
[Cancer , CNS , respiratory]
[Inflammatory , Allergic, ...]



- Increased health spending [Expected to rise by 25% by 2025]

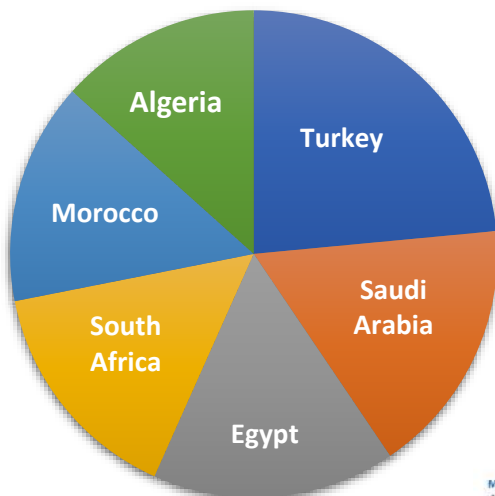
** IMS Health – March 2014

** Mc Kinsey&Company – April 2015

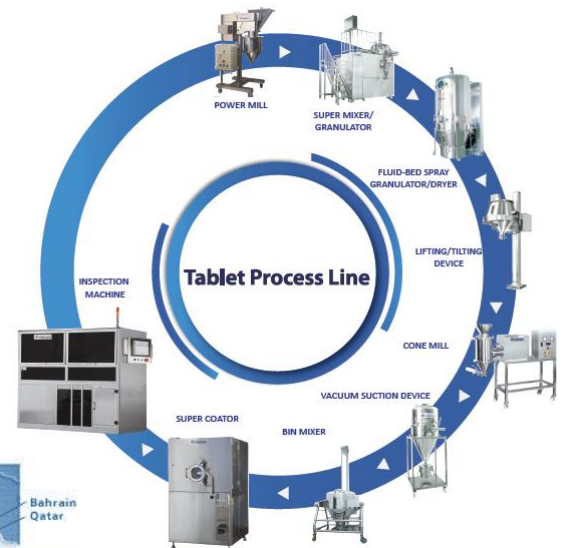
4.

Africa/Mid-East Pharma Market

Six Countries Account for >75% of AME Pharma Market



Manufacturing in These Six Countries Covers 70% of AME Pharma Needs



5.

Africa/Mid-East Pharma Players

Multinational Companies



- Operate in previous Colonies,
- Locally manufacture and sell patented brand drugs mainly to private sector,
- Out-license own patented /off-patent drugs to AME local generic makers.



Indian Companies

- Sell cheap generics to NGOs and look to win public tenders,
- Known for HIV drugs and essential generics.

Local Drug Manufacturers



- In-license brand patented /off-patent APIs and manufacture own generics,
- Sell some patented brand drugs,
- Serve domestic markets, but are rapidly expanding to neighboring countries.

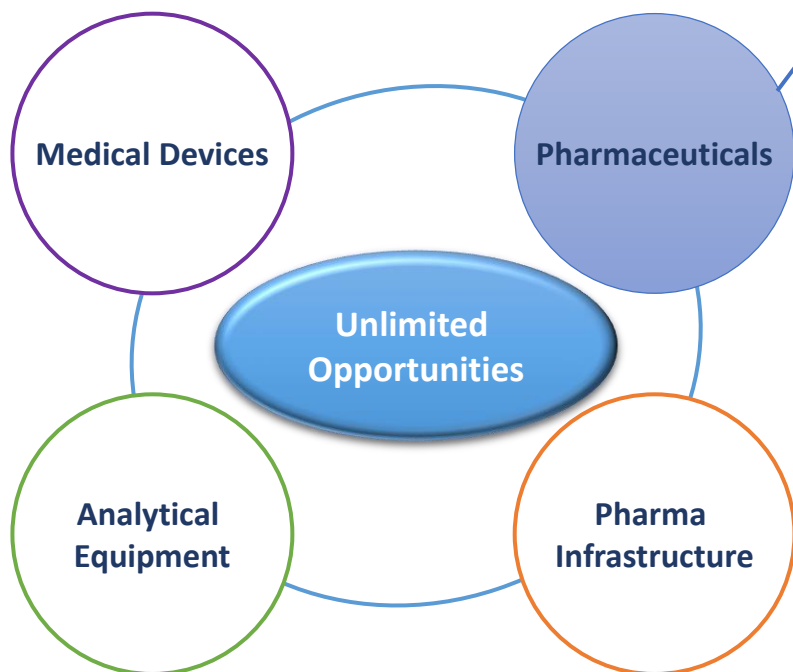
Chinese Companies

- Construction of healthcare infrastructure,
- Sell anti-malarial drugs and essential generics.

6.

Healthcare Opportunities

Great Potential / Extensive Benefits



APIs Technology Transfer

- Extension to our core CMC services
 - Brand patented /off-patent drugs
 - Generics, OTC drugs, Diagnostic agents

Business/Ethical Merits

- Promote corporate ethical value by contributing to AME fight against diseases,
- Give Japanese drugs a new life in AME,
- Benefit from a promising markets with 10 ~12% through 2030,
- Benefit from \$50 billion market that will reach \$65 billion by 2020.

7.

APIs Business Environment

- More than 350 drug manufacturers across AME,
- Local manufacturers in-license APIs and formulate generics,
- Mergers and strategic partnerships with multinationals are boosting generics growth,
- Generics are gaining market share with a growth rate expected to reach 40% by 2020.



- Many countries offer tax exemptions reduced land prices to encourage building of pharma facilities,
- Good Quality/Regulatory Standards that comply with WHO, EU, ICH ,PICS requirements. → → →



8.

AME : Drug Quality and Regulations

■ Drug Quality & Regulations

- Most big AME pharma companies have well developed manufacturing and quality control capabilities. However, R&D activities remain limited,
- AME drug manufacturers operate under established local and/or international (WHO, EU, ICH) quality and regulatory guidelines,
- Some countries, like Turkey and Morocco, are considered in EU zone, and as such, export drugs to EU/West Europe/USA,
- Pharma quality in a number of countries is accredited by international bodies like the European Directorate for the Quality of Medicines (EDQM, EP Pharmacopeia),
- Almost all countries in the AME region are signatory of international treaties on protection of Intellectual property. Some countries are members of the World Intellectual Property Organization.



9.

AME : Drug Pricing / Reimbursement

■ Treatment Coverage

- Brand drug dominate most AME markets with over 70% share compared to 30% for generics,
- Drug prices are controlled by the state, which largely shoulders 50 ~ 85% of treatment cost. This coverage varies among AME countries,
- Private insurance companies are gradually expanding in AME. They offer various plans that cover 20~ 50% of treatment cost,
- Some patients can afford out-of-pocket payment (up to 80% of treatment cost).



10.

How to Succeed in AME

Decide on Where to Play

- Identify markets that offer the greatest opportunities as well as good prospect for success.

Focus on Where the Growth is

- More than 70% of AME GDP cumulative growth comes from just 10 out of the 71 AME countries.

Forge Local Partnerships

- Facilitate market access and expansion into other AME countries,
- Help understand AME varying regulatory environments,
- Help navigate consumer preferences, pricing, manufacturing /distribution.



COLLABORATION



11.

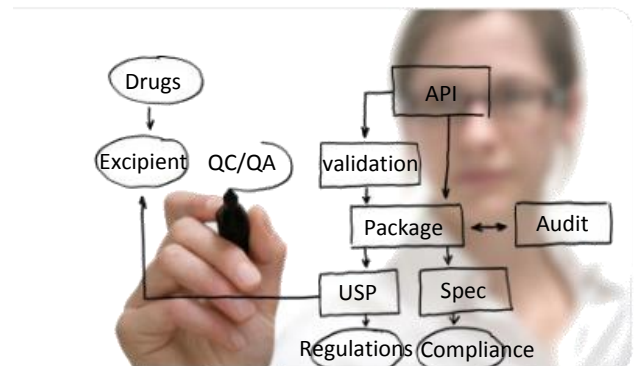
PMP : Your Best AME Partner

Broad Expertise

- Over 22 years serving the pharma industry,
- Highly experienced bilingual consultants, each with over 20 years experience in the pharma industry,
- Administrative staff with good command of English, Japanese, French and Arabic.

Projects Scope

- Preclinical and Clinical Pharmacology/Pharmacokinetics,
- APIs/Drug Product CMC, GMP & Regulatory Affairs,
- IND/NDA Preparation/Submission (CTD, ICH guideline),
- APIs In-/out-license Project Management,



- IT solutions for Manufacturing Execution System,
- Excipient Manufacturing, QC, QA (IPEC GMP),
- Drug Packaging Qualification, QC, QA (GMP),
- Transdermal patches in drug delivery.

12.

PMP Presence in AME

AME Offices/Affiliates/Partners

- PMP Morocco office (established June 2016),
- Coordinate N. Africa operations.
- Affiliates/Partners: Egypt, Turkey, Dubai and South Africa,
- Coordinate operations in other AME regions.
- Plans underway to expand to Nigeria and Kenya.

AME Pharma Business Network

- Business alliance with a number of AME generic manufacturers,
- Most of our AME pharma partners operate both locally and in neighboring countries (manufacturing, distribution, sales),
- Some of our AME pharma partners operates in over 30 AME countries.



13.

Morocco: A Vibrant Pharma Hub

Strategic Location

- 14 Km to Europe, 2 hr flight to Paris, 4 hr flight to West Africa
6 hr flight to Mid-East, 8 hr flight to East Africa.

3rd Best Pharma Manufacturing Capabilities in AME

- Well established cGMP in accordance with WHO/EU guidelines,
- Pharma quality accredited by the European Directorate (EDQM),
- Local drugs exported to most AME countries,
- Free trade agreement with over 50 countries (EU, US, some AME countries),
- Signatory of international treaties on protection of Intellectual property,
- Tangier, a city in the north, is a free zone at the gate of Europe,
- Over 40 Japanese companies already operating in Morocco,
- Japanese organizations in Morocco: Embassy, JICA, JETRO.



14.

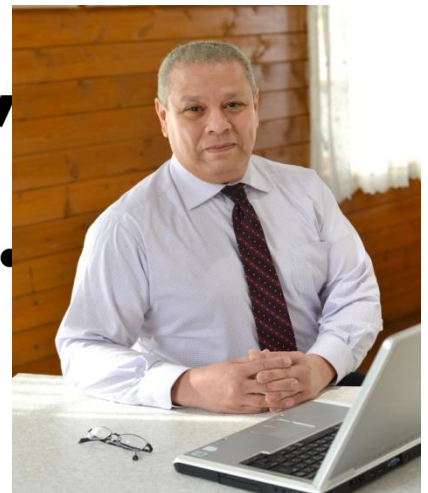
PMP Business Support

Administrative Support

- List your product in our APIs Portfolio,
- Actively promote technology transfer through our AME offices/affiliates,
- Initiate projects and handle all preliminary business interactions,
- Manage projects on your behalf and provide all the necessary linguistic and logistics support,
- Handle all CMC technical and regulatory operations for smooth technology transfer,
- Negotiate contracts and intellectual property issues,
- Give your company a presence in AME through our offices/affiliates.



**YES,
WE
CAN.**





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