

LIFE SCIENCES INDUSTRY REPORT 2025

PART 1: PHARMA MARKET OVERVIEW – US & EUROPE

Uncover the transformative trends that will drive the life sciences industry ahead, backed by expert commentary and data-driven insights.



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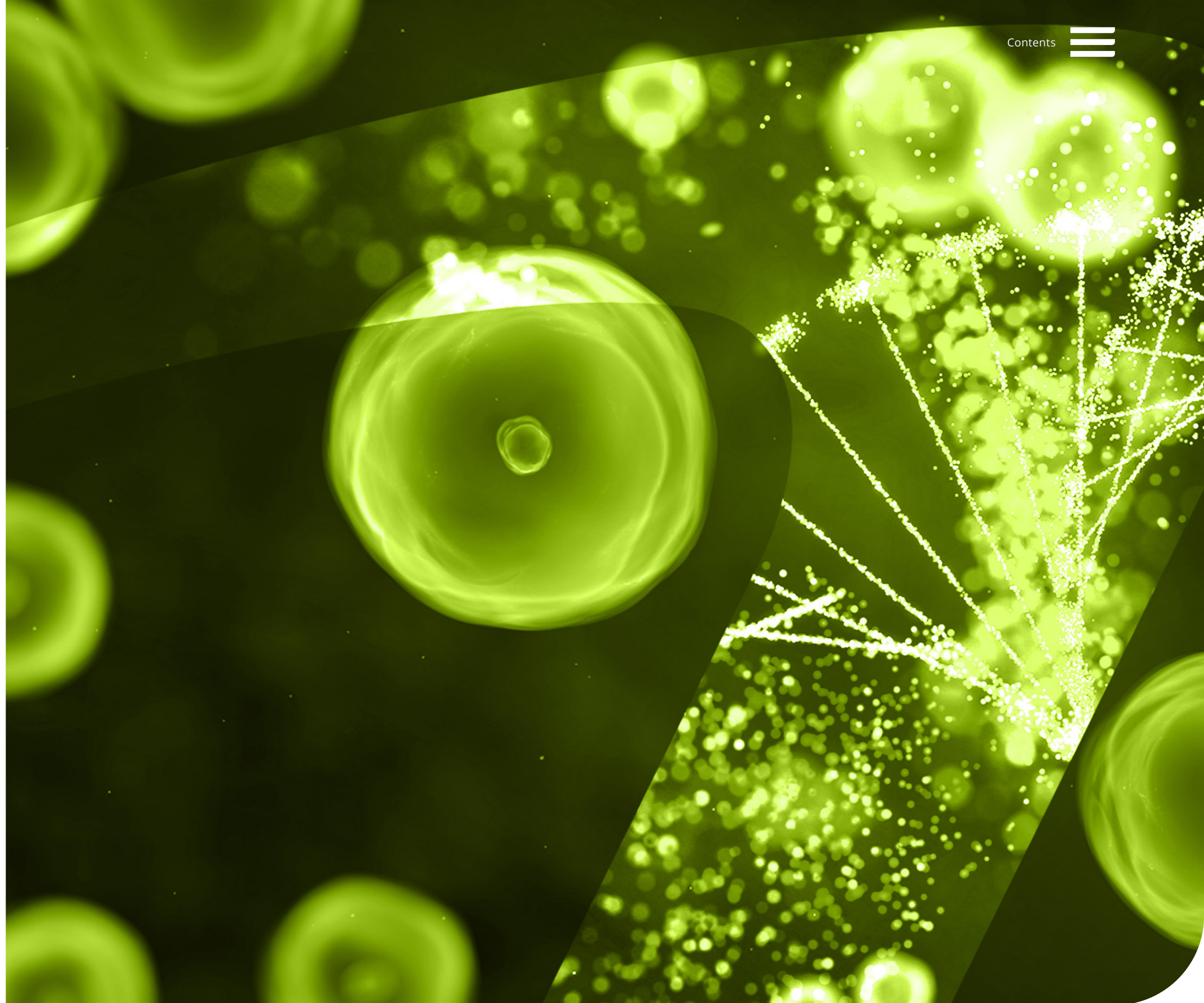
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Editors' introduction

For the life sciences industry, 2024 has been a year of progress, but that forward momentum – technologically and scientifically advancing for the benefit of patients globally, across a broad spectrum of diseases – has not been unhindered by challenges. With 2025 approaching, pharmaphorum took a look back at the year and gathered together here a selection of multimedia content that really encompassed the key trends identified and/or addressed these past 12 months.



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For years, digital innovations like artificial intelligence (AI) lingered on the periphery of healthcare – intriguing, but not fully embraced. Now, that narrative has fundamentally changed. Technology has become a dynamic catalyst across the industry, driving breakthrough discoveries that accelerate drug development, reimagine clinical trials, and provide unprecedented insights into complex medical challenges. There are risks yet to be mindful of, of course, but with the human kept in the loop, the potential is considerable.

This current technological wave arrives at a critical juncture of global healthcare needs. Beyond laboratory innovations, digital health solutions are reshaping patient experiences, offering personalised care options that were once thought unrealistic. The industry is also responding to urgent societal calls for sustainability and health equity with remarkable adaptability – demonstrated through the emergence of generics and biosimilars, expanding GLP-1 applications amid overwhelming demand, and more targeted rare disease research.

This isn't innovation for innovation's sake. As the life sciences industry navigates this technological renaissance, the conversation has shifted from whether we can adopt these technologies to how we can strategically deploy them to build a more intelligent, responsive, and equitable healthcare ecosystem.

From a pharma market overview in the US and Europe to oncology, rare disease, and the applicability of cell and gene therapies beyond cancer care – the Life Sciences Industry Report 2025 aims to provide a snapshot of an industry very much at the height of its discovery and development capabilities, on the precipice of truly impressive, paradigm shifting innovation and, vitally, paving the way to broader access to treatments that will permit better quality of life and patient outcomes overall.



ESG considerations in reimbursement decisions

While public tenders focus on the procurement of medicines, reimbursement decisions ultimately determine which treatments are funded and made available to patients. Health Technology Assessments (HTAs) offer another opportunity for policymakers and decision-makers to consider incorporating environmental

sustainability into funding decisions. While the integration of ESG into HTA frameworks is still in its early stages, some HTA bodies have started to explore how to integrate environmental considerations into their evaluations.

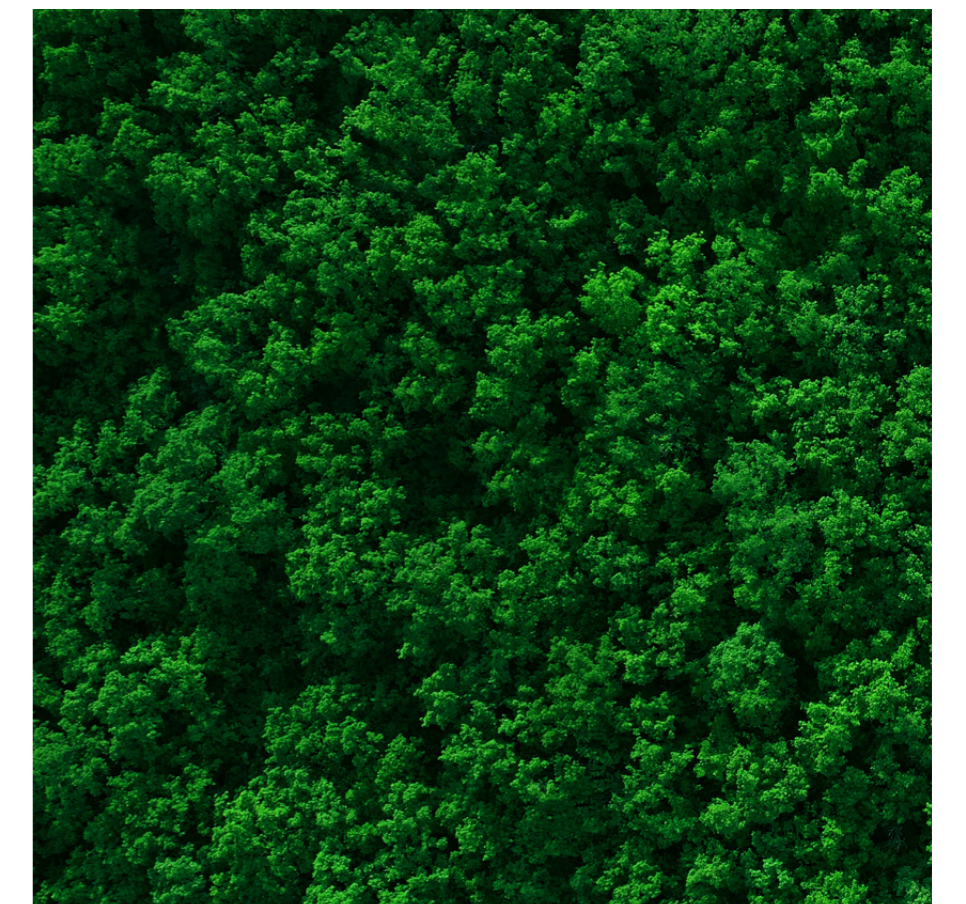
However, integrating ESG metrics into HTA frameworks presents challenges, such as the lack of reliable and standardised data on the environmental impact of different therapies and the need to balance environmental sustainability with clinical effectiveness and cost-effectiveness.

Despite these challenges, organisations like the National Institute for Health and Care Excellence (NICE) in the UK are taking action. In its 2021-2026 strategy, NICE pledged to “consider how environmental impact and wider societal values should be reflected” in its advice. To meet this ambition, NICE is exploring ways to include environmental impact data in its guidance to reduce the carbon footprint of health and care. Similarly, the Canadian Agency for Drugs and Technologies in Health (CADTH) has included environmental impact assessments in its strategic plan.

The integration of environmental sustainability into HTAs is still in its early stages, but it represents a significant step towards a more sustainable healthcare system. As the field of HTA evolves, it is likely that ESG considerations will play an influential role in shaping reimbursement decisions.

Carbon neutrality targets and market access

Several leading pharmaceutical companies are taking significant steps toward carbon neutrality and environmental sustainability, driven by both regulatory pressures and a growing recognition of their environmental impact. These commitments extend beyond corporate social responsibility and are vital for demonstrating leadership in a rapidly evolving landscape.



In Europe, several pharma companies have set ambitious carbon neutrality targets. For example, AstraZeneca has committed to reducing emissions by 98% across its global operations (Scope 1 and 2) by 2026, a target validated by the SBTi. Similarly, GSK aims to achieve an 80% reduction in emissions for its operations (Scope 1 and 2) by 2030.

By demonstrating their commitment to carbon neutrality, companies can enhance their reputation, gain a competitive advantage, attract investment and align with policy goals. As the focus on environmental sustainability intensifies, carbon neutrality targets will likely play an essential role in market access decisions.

Social initiatives and market access

Beyond environmental concerns, the 'S' in ESG encompasses social factors like diversity and inclusion, labour standards, patient engagement and health equity. These initiatives are integral to market access, as companies recognise that their societal impact can significantly influence their ability to bring new therapies to patients.



As healthcare systems move towards sustainability, it's important to ensure that new environmental measures don't widen existing inequalities. Tools like Health Equity Impact Assessments (HEIA) can help policymakers evaluate how new programs or technologies might affect different population groups, ensuring equitable access to care even as sustainable practices are implemented. This is particularly important for vulnerable populations who may be at greater risk of being left behind as wealthier regions adopt low-carbon health technologies. Decarbonisation efforts must be combined with promoting health equity and building climate resilience, ensuring that all populations can benefit from low-carbon healthcare systems.

By actively engaging in social initiatives, companies can demonstrate their commitment to societal well-being and build stronger relationships with stakeholders. However, implementing and measuring the impact of these initiatives can be complex. Specialised consultancies can play a crucial role in helping companies navigate these complexities and ensure their social initiatives are aligned with ESG goals and market access requirements.

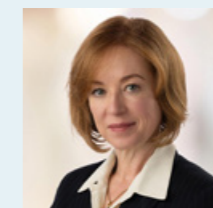
Navigating the future of ESG and market access

As the landscape evolves, the integration of ESG into market access and reimbursement decisions will likely involve greater standardisation of reporting frameworks and methodologies. While environmental considerations have taken the initial spotlight in many ESG discussions, social factors like health equity, patient engagement, and diversity and inclusion have always been essential aspects of responsible business practices within the pharma industry. These social factors are now receiving even greater emphasis as part of a holistic approach to ESG.

To effectively navigate the evolving ESG landscape, companies need expert guidance to take a proactive and strategic approach. Partnering with specialised consultancies can help businesses incorporate ESG principles into their strategies, ensuring alignment with payer and regulatory expectations. From identifying key ESG opportunities to embedding sustainability in market access strategies and plans, these partnerships enable companies to effectively respond to evolving demands while maintaining a competitive edge.

The journey towards an environmentally sustainable healthcare industry requires a collective effort. By working together, manufacturers, payers and academics can ensure that ESG considerations are integrated into market access decisions in a way that balances environmental goals with the imperative of ensuring patient access to innovative treatments.

About the author



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