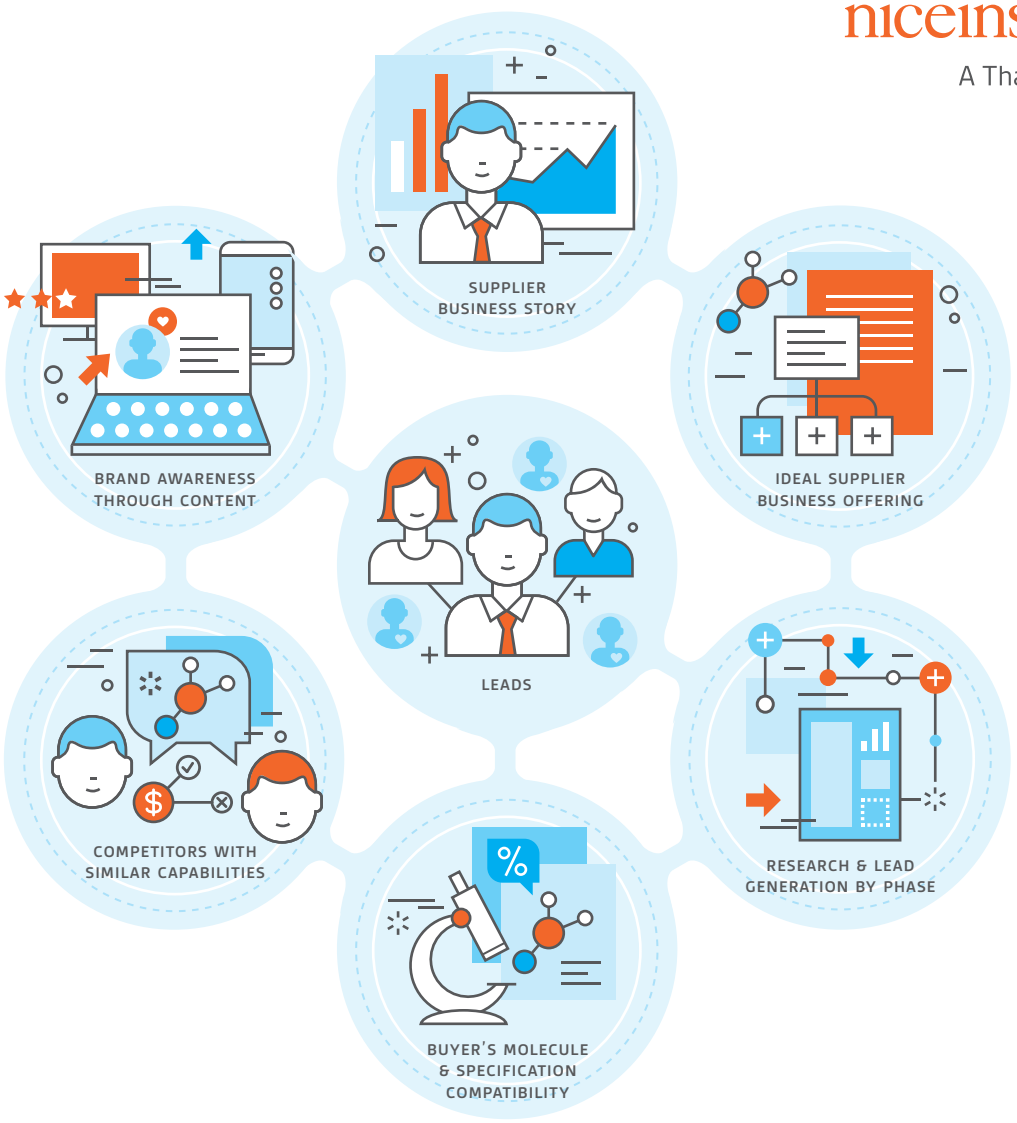
niceinsight

A That's Nice Brand




# 2018 Full-Time Equivalent (FTE): Pharmaceutical Excipients

## 15 Dedicated Research and Business Intelligence Team Members

### MARKET SEGMENTS

**Preclinical Trials**

**Drug Substance**
+ Small Molecule API
+ Biologics

**Drug Product**
+ Small Molecule
+ Sterile Injectables

**Pharmaceutical Excipients**

**OEM Pharmaceutical Equipment**
+ Drug Product
+ Biologics

### CONTENTS




That's Nice LLC

89 Fifth Avenue
5th Floor
New York
NY 10003-3020

+1 212 366 4455

New York – Raleigh – Chicago
San Diego – San Francisco
Dallas – London – Frankfurt
Shanghai – Shenzhen

# Supplier Business Story

**POINT(S) OF CONTACT**

Board-Level

**CORPORATE PROFILE / BUSINESS STORY**

We are one of the largest excipients manufacturers looking to expand into the effervescent tableting market in the USA. We are currently working on a line of excipients designed specifically for dissolvable tableting formulations and would like to understand market opportunities.

## Ideal Supplier Business Offering

| | RESPONSIBLE ROLE | PARAMETERS CATEGORY | PARAMETERS |
|---|---|---|---|
| 1 | Chief Executive Officer / President, General Manager | Project Definitions | Looking for effervescent tableting dosage form projects in North America. |
| 2 | Chief Scientific Officer, Plant Manager | Chemistry / Technical Barriers | Focused on slow and controlled API release, taste masking and moisture control in humid climates. |
| 3 | Chief Executive Officer / President, General Manager | Project Type Prioritization / Focus *(based on experience)* | Difficult formulation shift to regional climate control; dealing with bi- and tri-layer tablets. |
| 4 | Chief Commercial Officer, Sales Director | Minimum Project Size (based on department) *[Profitability is important for a small CDMO]* | 1. 10 tons of 200-grain lactose: **$20,000**<br>2. Development of a new taste-blocking inhalation grade lactose excipient (including stability testing and toxicology study): **$2 million**<br>3. Controlled release for a digestive OSD: **$1.5 million** |
| 5 | Chief Executive Officer / President, General Manager | Ideal Project Specifications *(for consideration)* | 1. Moving a non-FDA product from Europe to North America with a portfolio of 10 molecules and reformulation capabilities (including stability testing and toxicology study): **$10 million**<br>2. 10 tons of inhalation grade lactose at 5 batches: **$250,000**<br>3. 100 tons of inhalation grade lactose at 20 batches: **$2.3 million** |

# Research & Lead Generation by Phase

| | POINT(S) OF CONTACT | PARAMETERS CATEGORY | PARAMETERS |
|---|---|---|---|
| 6 | Chief Commercial Officer, Sales Director | Geographic Target Area *(Prospect) [With 50 states, this client expanded a sales territory]* | Market for OSD effervescent tablets which are currently marketed in North America. The niche dosage form is the target market for their new line of excipients designed for effervescent tableting.<br>A total of 51 companies are manufacturers and marketers for 18 products marketed in USA.<br>Provided a SWOT analysis for 10 closest competitors, with detailed product profiling and opportunity recommendations for each competitor. |
| 7 | Chief Financial Officer, Compliance | Risk Assessment; Historical Success & Therapeutic Approval | Snapshot of the SWOT analysis for Competitor 1:<br>**Strength:** Competitor has formed a partnership with a North American pharmaceutical firm to provide contract manufacturing, technical support, and formulation development services to prospective clients. Few excipient companies offer these packaged services alongside their core product offering.<br>**Weakness:** Competitor has a limited number of manufacturing and distribution sites worldwide, resulting in a limited scope of projects on which they can deliver.<br>**Opportunity:** Competitor's relative lack of novel offerings for innovative excipient products is an opportunity for our client to demonstrate the effectiveness of its alginates-based products. Clients looking for products designed for highly specialized dose forms or applications would be drawn to the potential that alginate polysaccharides show.<br>**Threat:** Competitor has a strong presence in Southeast Asia with significantly more regional and distribution office locations throughout the region, putting them in a commanding position to benefit more from that market as it continues to outpace growth in other, larger markets in western countries. |

# Buyers' Molecule Specification & Compatibility– 18 Effervescent Tablets Of Interest (3 of 18 Products Shown)

| | POINT(S) OF CONTACT | COMPANY | PRODUCT | THERAPEUTIC CATEGORY | PHASE OF COMPANY INVOLVEMENT | ROUTE OF ADMINISTRATION |
|---|---|---|---|---|---|---|
| 8 | Chief Marketing Officer | Boehringer Ingelheim | Zantac | Gastroenterology | Marketed | Oral |
| | | Pfizer | Tramadol Hydrochloride | CNS | Marketed | Oral |
| | | Sandoz | Ranitidine Hydrochloride | Gastroenterology | Marketed | Oral |

# Leads Generated – 926 Leads from 51 Companies

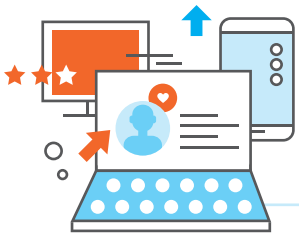
(6 OF 926 SHOWN)

| | POINT(S) OF CONTACT | COMPANY | FIRST | LAST | CONTACT TITLE | PHONE NUMBER | CHEMICAL / BIOLOGICAL CLASS |
|---|---|---|---|---|---|---|---|
| 9 | Chief Marketing Officer | Boehringer Ingelheim | Sabine | Noll | Head, Procurement Raw Materials | +49-6132-770 | sabine.noll@boehringer-ingelheim.com |
| | | Boehringer Ingelheim | Eduardo | Lioy | Global Head, Raw Materials & Outsourced API Sourcing | +49-6132-770 | eduardo.lioy@boehringer-ingelheim.com |
| | | Pfizer | Robert | Walton | API Project Leader/ Senior Principal Scientist | +44-1304-616161 | robert.walton@pfizer.com |
| | | Pfizer | Marc | Tesconi | Director, Formulation Design & Development | +1 860-441-4100 | marc.tesconi@pfizer.com |
| | | Sandoz | Ursula | Bauer | Global Head, Quality Assurance & Material Supply | +143-5338-200-0 | ursula.bauer@sandoz.com |
| | | Sandoz | Vinatzer | Dagmar | Global Head, Quality Assurance & Material Supply | +49-39203-71-0 | dagmar.vinatzer@sandoz.com |

# Worldwide Competitors with Similar Capabilities, Equipment & Ability to Deliver on Specification

| POINT(S) OF CONTACT | COMPANY | LOCATION | THREAT LEVEL* |
|---|---|---|---|
| 10 Chief Marketing Officer | Archer Daniels Midland | Illinois, USA | ↗ |
| | Asahi Kasei | Miyazaki, Japan | ↔ |
| | Ashland | Kentucky, USA | ↗ |
| | BASF | Ballerup, Denmark | ↗ |
| | Colorcon | Indiana, USA | ★ |
| | DFE Pharma | Borculo, Netherlands | ★ |
| | DowDupont/FMC | Grindsted, Denmark | ↗ |
| | Evonik | Darmstadt, Germany | ↔ |
| | Gattefosse | San Priest, France | ★ |
| | JRS Pharma | Rosenberg, Germany | ★ |
| | Kerry | County Kildare, Ireland | ★ |
| | Meggle | Wasserburg, Germany | ★ |
| | Nisso HPC | Nihongi, Japan | ↔ |
| | Shin Etsu | Niigata, Japan | ↔ |
| | SPI Pharma | Delaware, USA | ★ |

| *THREAT LEVELS KEY | ★ HIGH | ↔ MEDIUM | ↗ LOW |
|---|---|---|---|
| | Similar / same offering; direct competitor | Compatible equipment; larger scale; indirect competitor | Larger scale equipment; aspirational competitor |



# Brand Awareness Through Strategic Content Subject Matter (FOCUSED ON BUYER NEEDS)

## SUCROSE

***Quality by Design: Transforming 21st Century Pharmaceutical Manufacturing***
*(Placed in Pharma's Almanac Q3 August 1, 2016)*
Achieving QbD goals requires deep understanding of the product (including raw materials, excipients and intermediates) and the process (including process parameters and process performance attributes) and their impact on quality.

## LACTOSE

***Dry-Powder Inhalation Formulation: Balancing Performance and Manufacturability***
*(Placed in Pharma's Almanac Q4 October 1, 2016)*
For carrier formulations, the particle size distribution of the API and the percentage of fine lactose in a formulation are the main parameters that influence aerodynamic performance.

## CONTROLLED RELEASE

***Embracing Formulation Expertise to Extend Exclusivity & Improve the Patient Experience***
*(Placed in Pharma's Almanac Q3 August 1, 2016)*
The most popular dosing change involves the development of modified release — including controlled or extended release (XR) and fixed-dose combination (FDC) — versions of the patented drug.

## ENCAPSULATION

***Particle Engineering for Improved Bioavailability in Oral Solid Dose Medications***
*(Placed in Pharma's Almanac Q1 March 8, 2017)*
Oral solid dose (OSD) form medications remain the industry juggernaut. Though biopharmaceuticals continue to grow and evolve, offering new and unique treatment options, small-molecule drugs maintain their dominance with OSD medications leading the charge.