

Clinical Research Drives Health Innovation

A Close-Up Look at Clinical Research in Southeast Asia

Southeast Asia Is A Growing Health Market

Southeast Asia is home to 600 million people, or 9 percent of the world's population, and is one of the fastest growing and most dynamic economic regions in the world. And, thanks to treatment breakthroughs and wider health care access, people across Southeast Asia are living longer than ever before.

There is tremendous opportunity to build on this foundation and further improve health outcomes for those living in Southeast Asia. Implementing the right pro-innovation policy reforms and securing additional investment in early stage clinical research can improve health outcomes and the overall medical research infrastructure in Southeast Asia. Investment in multi-regional clinical trials can also expedite global clinical development and improve patient access to new and innovative treatments.

The Value and Benefits of Clinical Research

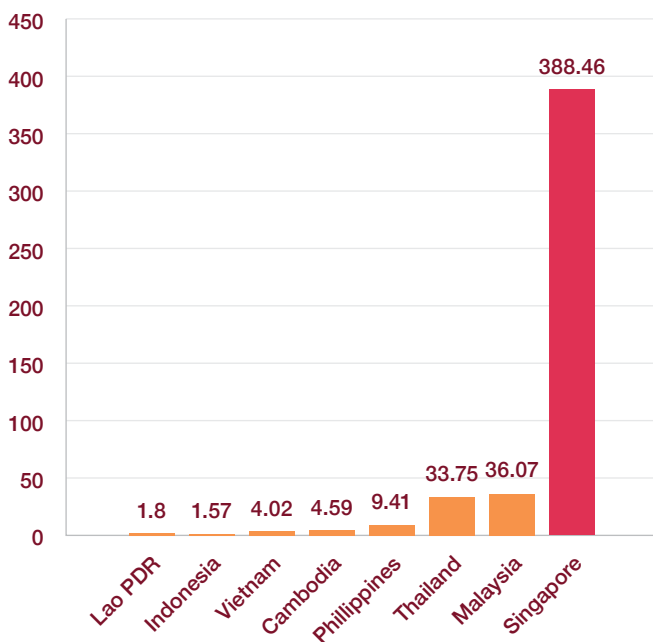
Beyond these benefits, clinical research and trials provide key opportunities for the growth of Southeast Asia's medical research industry and help physicians and scientists gain the experience necessary to become leaders in their fields.

Additionally, the economic benefits of clinical trials are significant. They include tax contributions for government budgets and jobs for physicians, researchers, contract research organizations and site management organizations.

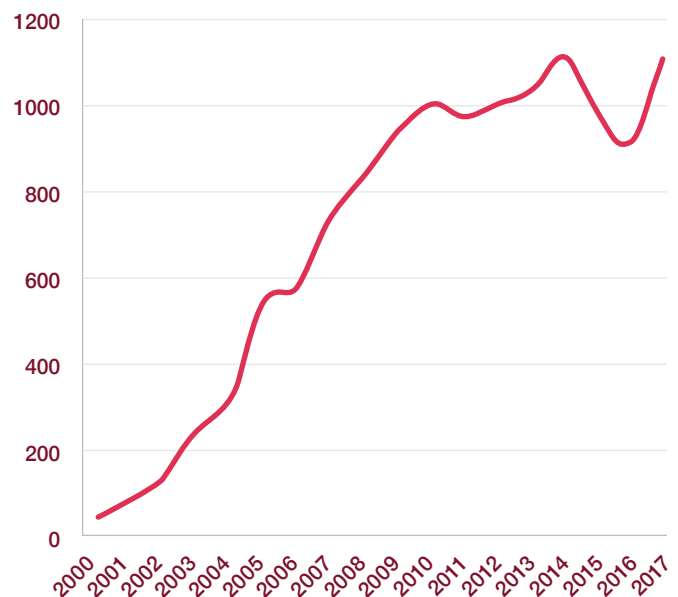
In Thailand, for example, clinical trials contributed \$270 million to the country's GDP for 2015, and the long-term economic return of medicines produced from those trials was \$13.4 million.¹

The economic value of clinical trials is apparent outside of Southeast Asia, as well. For example, in the United States, nearly two-thirds the cost of bringing a new medicine to market was invested in clinical trials² by the biopharmaceutical industry, which generated a total of \$25 billion in economic activity in 2013.³

INTENSITY OF CLINICAL RESEARCH—CLINICAL TRIALS PER MILLION POPULATION, 2000–2017⁴



EAST ASIA AND THE PACIFIC* OVERALL CLINICAL TRIAL ACTIVITY, 2000–2017⁴



*Includes ASEAN countries

Southeast Asia Is Emerging as a Center for Biopharmaceutical Innovation

Southeast Asia is already seeing the benefits of clinical trials. For example, Singapore has adopted effective patent protection and enforcement policies and has seen higher levels of clinical research. As a result, Singapore has nearly tripled its pharmaceutical manufacturing.⁵

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Pro-Innovation Policies Ensure Access to Life-Saving Medicines

Countries adopting effective intellectual property protection and enforcement policies have seen higher levels of clinical research and improved access to innovative medicines. Without the protections of a strong, modern intellectual property system, researchers may not have the ability to explore new areas of medical innovation and unearth the findings that will lead to the treatments and cures of tomorrow.

By Comparison: Clinical Research in Singapore

Singapore is a regional leader in clinical research and a member of the Global Patent Prosecution Highway. The country is known for its strong intellectual property rights, quickly becoming an attractive market for biopharmaceutical investment.

This strong IP framework has allowed Singapore to develop a favorable ecosystem for clinical research and healthcare innovation. From 2000–2017, more than 7,000 clinical trials took place in Singapore.

NEW EARLY-PHASE CLINICAL TRIALS PER MILLION POPULATION, 2000–2017⁴



The Benefits of Clinical Trials for Health

Clinical research is one of the first steps in the drug discovery and development process, which spans from initial research to the delivery of life-saving or life-enhancing new medicines. Increased investment in clinical research paves the way for the development of new medicines that can save lives and reduce the need for other health care services. A research ecosystem also fosters economic growth by equipping innovators with the tools they need to bring treatments to patients who need them most.

Singapore is currently the only country in Southeast Asia playing a role in early stage clinical research. But with the right policies in place, others could join.

¹ Miseta, Ed. "Thailand Puts Increased Focus On Clinical Trials.", www.clinicalleader.com.

² "U.S. Investments in Medical and Health Research and Development" Research America, 2017, www.researchamerica.org.

³ "Biopharmaceutical Industry-Sponsored Clinical Trials: Impact on State Economies." PhRMA, 2015, www.phrma-docs.phrma.org.

⁴ "Mapping Clinical Research Activity in Key Emerging Markets Around the World." Pugatch Consilium, 2019, www.pugatch-consilium.com

⁵ "Pharma in South East Asia Booming as CPhI Opens Event for the First Time in Thailand." BioSpace, 2019, www.biospace.com.