

# Compound & BioSample Management Market Trend Report





Compound management and biological sample management both have significant influence in the drug discovery process. Compounds of a high integrity contribute to reliable results when locating drug candidates. Additionally, the collection, storage and distribution of human biological materials supports the advancement of the R&D industry, aids understanding of the mechanisms of diseases and fuels the trend to provide personalised medicines.

Last year in Pharma IQ's Compound Management and Biobanking Activity tracker, around 20 compound management industry members and 28 biobanking industry members examined and pinpointed the most recent trends in both markets over the past year and the predicted trends on the horizon.

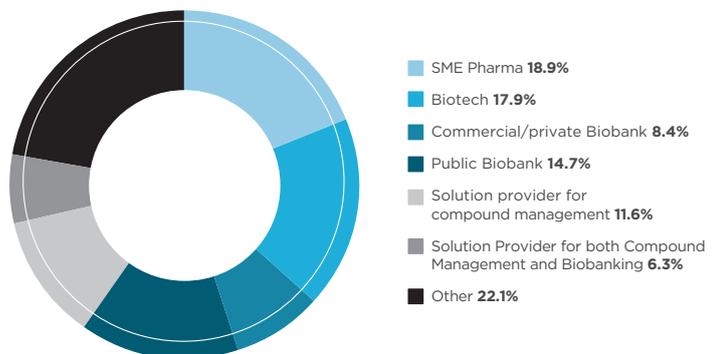
In the report both industries highlighted automation as a beneficial technique for minimising errors and improving workflow efficiency. Our participants both in the biobanking and compound management sectors had some level of investment planned for technology and software scheduled over the following 12 months. However, our compound participants showed consensus that there was a gradual slow in the buzz behind automation as the sector settled down with their robotics option of choice and focused on refining their detailing. A minority of our biobanking experts expressed a lack of confidence in robotics systems.

It was evident in the findings that sample quality was to remain a prime focus across the two markets. With sustainability levels in biobanking standing as a traditional challenge leading some biobanks to close their doors, the move to concentrate upon the quality and the actual usability of samples will look to conquer this hurdle. This is being fused with the focus to land public-private partnerships.

Team sizes saw a plateau especially on the compound management side. A slow growth was indicated within both industries, signifying an encouraging level of stability.

This year, we revisit the compound and biobanking markets to pinpoint any shifts or new trends in the market.

## Your Company's Category



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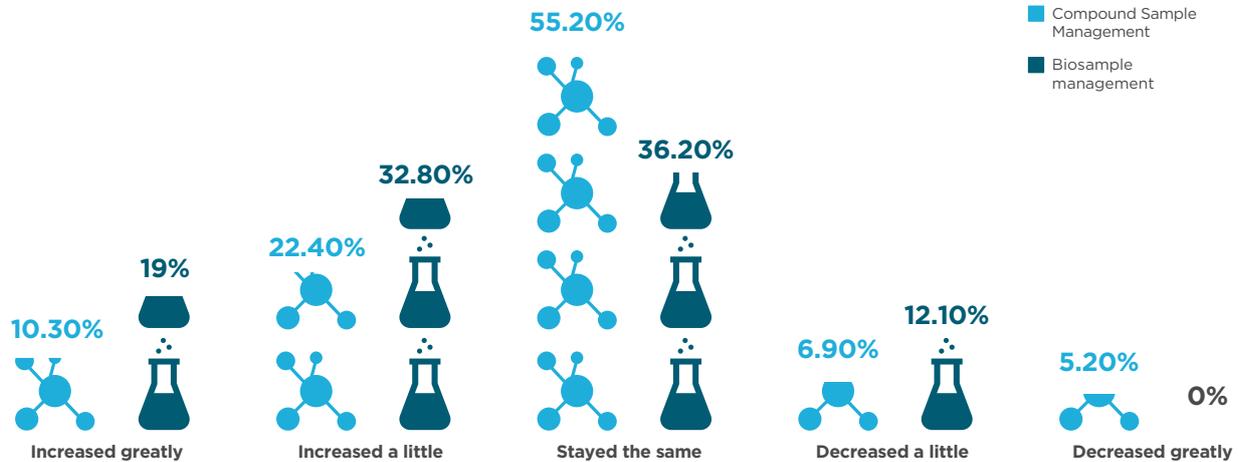


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# Analysis: 2016 Trends

## How Did Your Team Size Change in 2016?



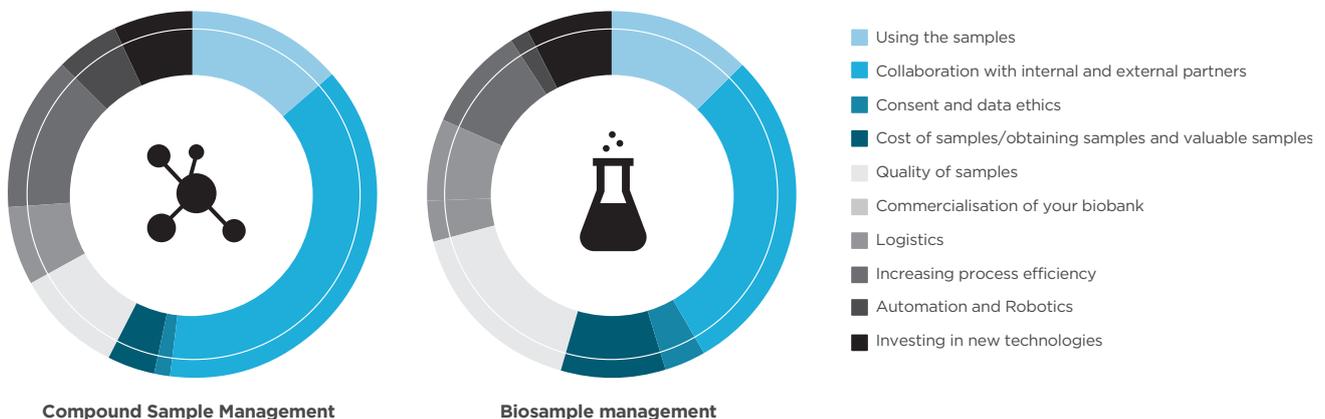
**Team Size in 2016:** No respondents saw a significant drop in team size on the biosample side and only a minority of respondents saw a great decrease in regards to compound management. With 32% of the compound base seeing an increase in comparison to the 51% on the biosample side. The majority of compound respondents seem to have experienced a plateau in team size, which aligns with the predictions made in last year's report where 60% of the base thought that the team size would stay the same in 2016. In 2015, compound management teams were said to have retained their size, which expresses a strong level of stability.

Last year's report predicted that biosample team sizes would build on the previous year's stability and even venture to grow in 2016, which appears to have come to fruition here. In 2015, the biosample management crowd appeared to enjoy mostly growth in fleet size.

**Company Focus for 2016:** The strongest priority here for both sectors is collaboration with internal and external partners. One challenge the biobank market faces is locating collaborations that will provide access to diverse and high quality samples. A recent report noted that the advancement of technology in regards to personalised medicine is a dominant contributor to the growth of the biobank market and, arguably, the need for access to more diverse samples. <sup>4</sup> Also, alliances between firms in the biobanking space have been marked as a major growing trend in the market. In regards to the importance of collaborations for the future of biobanking, Marcel Bruinenberg, Project Manager LifeLines noted: "I think, [the] future for biobanks is linked [to] collaborations because you cannot survive [alone] doing the biobanking storage part and selling stores and have samples and data on loan, so you have to do more and the critical part in that is finding collaborations."

Inge Moelans, Director Compound Logistics & Formulations, Janssen Pharmaceuticals (Johnson & Johnson) and Sarah Kauffhold Associate Scientist Compound Logistics Janssen Pharmaceuticals (Johnson & Johnson) both confirmed the importance of internal and external collaborations to compound management teams, especially regarding global collections.

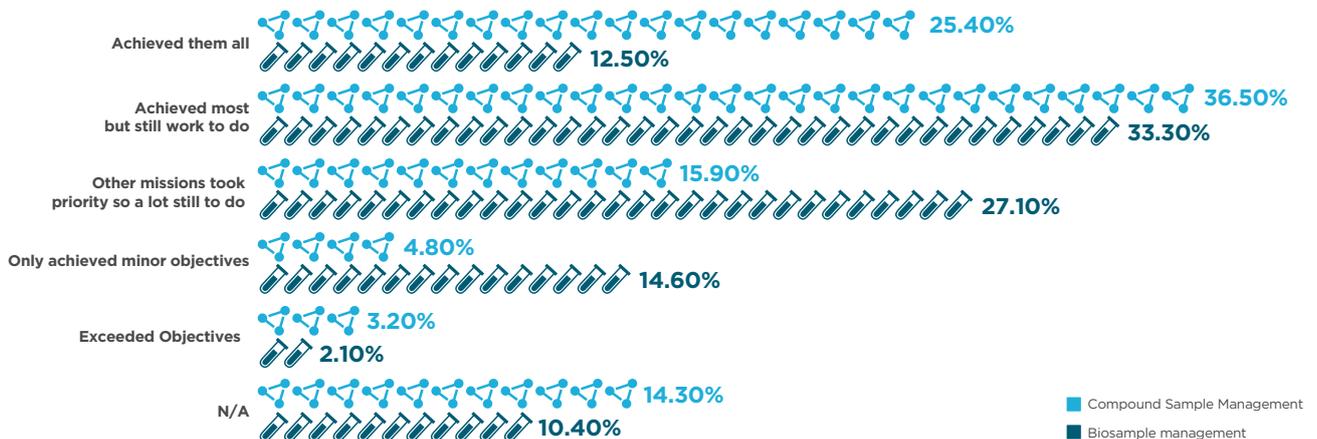
## What Was Your Company's Focus For 2016?



# Analysis: 2016 Trends



## How Well Did You Achieve Your Objectives for 2016?

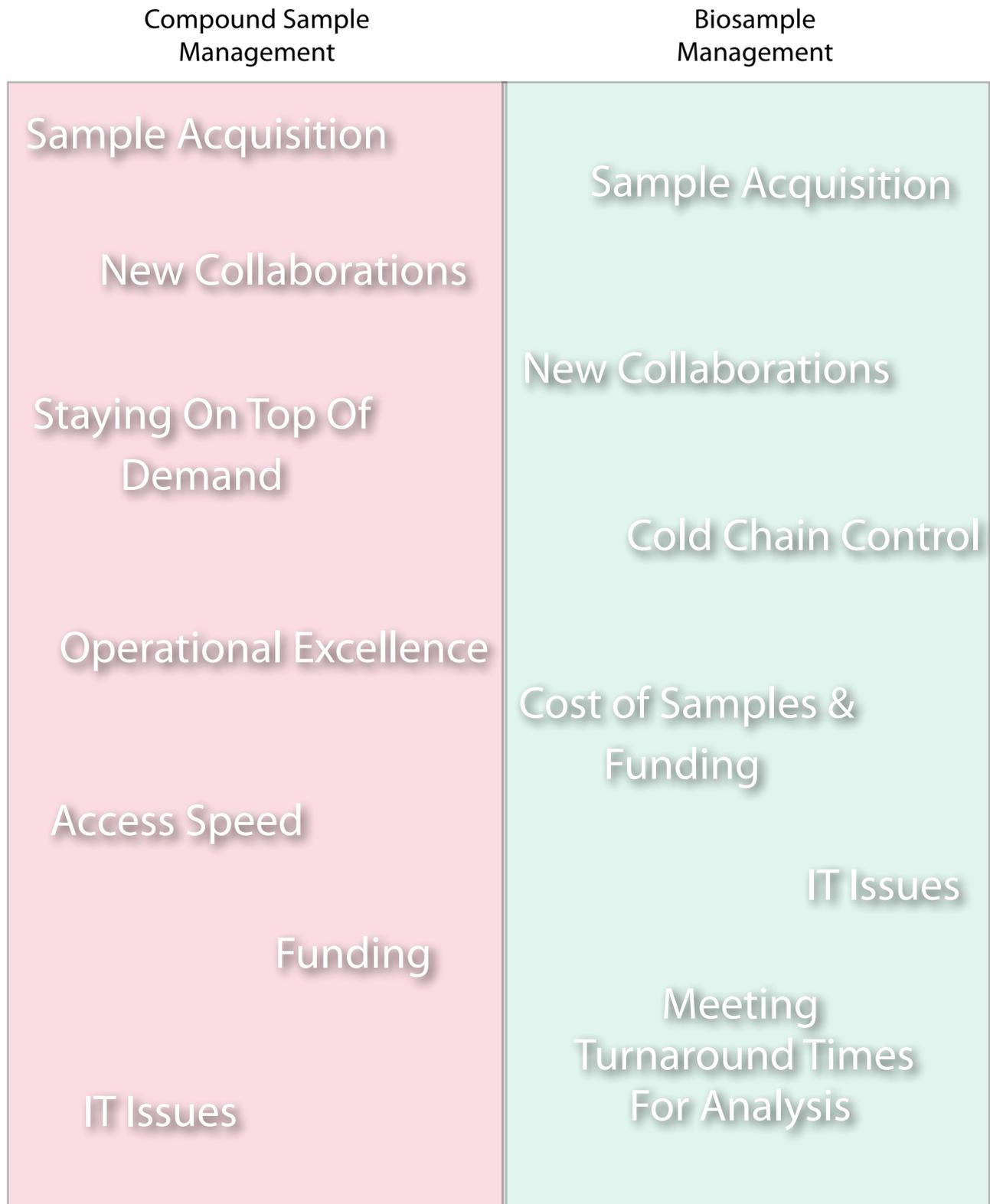


**2016 Objectives:** Assuming that all responses here are brutally honest, the compound sample management crowd were slightly more productive in achieving their objectives. A similar trend was seen in the previous year in our report. Also, more respondents in the biosample category admitted to only achieving minor objectives and noting that other missions took priority which blocked their 2016 objectives for biosample management.

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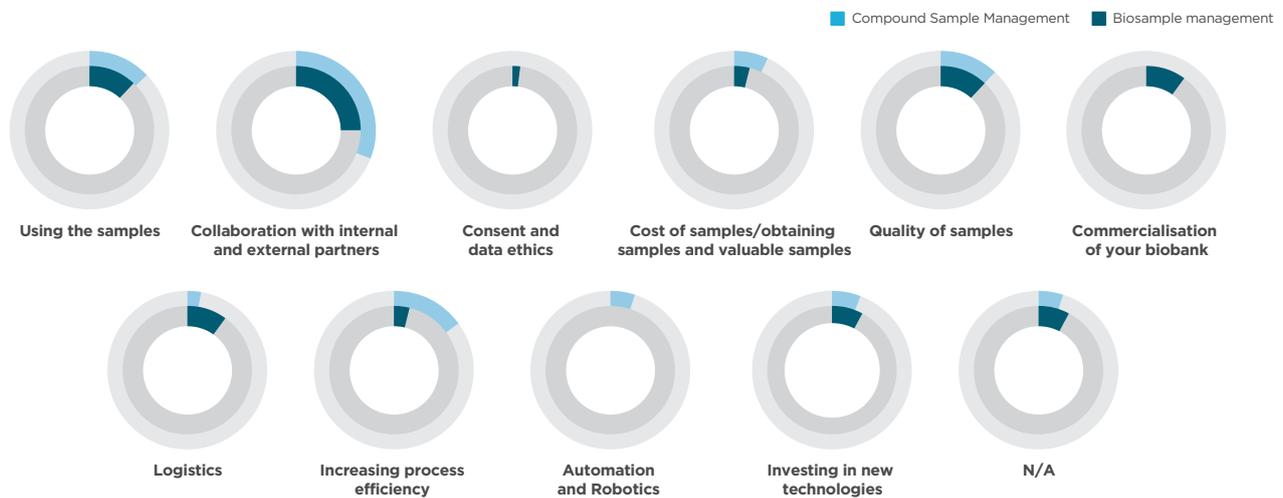
# Analysis - Challenges

We asked our response base to identify their main challenges within compound and biosample management



# Analysis: 2017 Projections

## What Are Your Company Objectives For 2017?

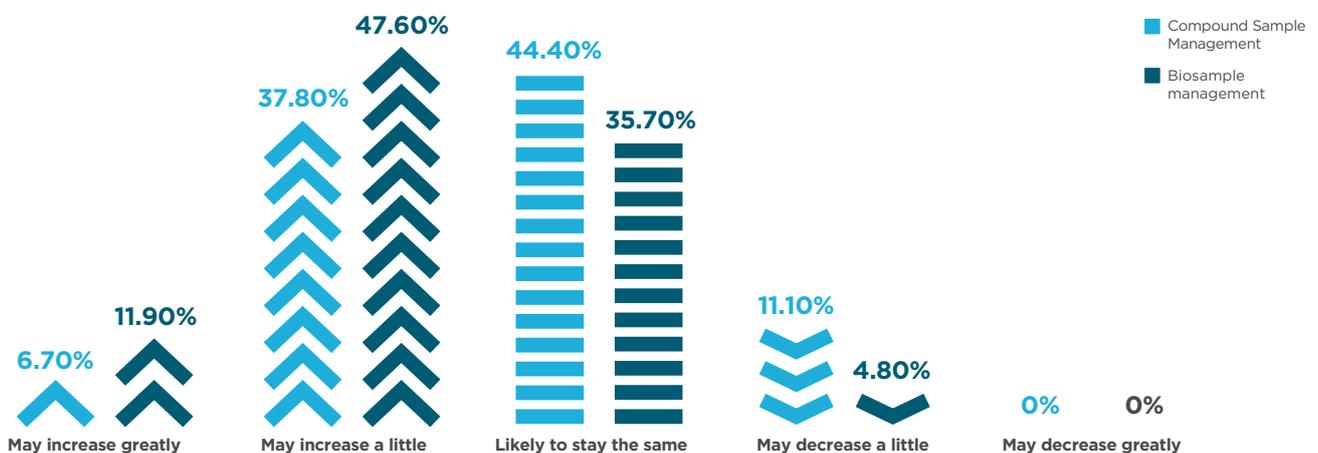


**Team Size in 2016:** Last year's report predicted that biosample team sizes would build on the previous year's stability and even venture to grow in 2016, which was reflected in this year's findings. In regards to the year ahead, biosample management respondents are confident that growth in team size will ensure, with 0 expecting a great decrease and 58% forecasting growth.

The majority of compound respondents experienced a plateau in team size over 2016, the forecast for 2017 appears to be similar. However more respondents have ventured to predict an increase in 2017 compared to those in last year's report.

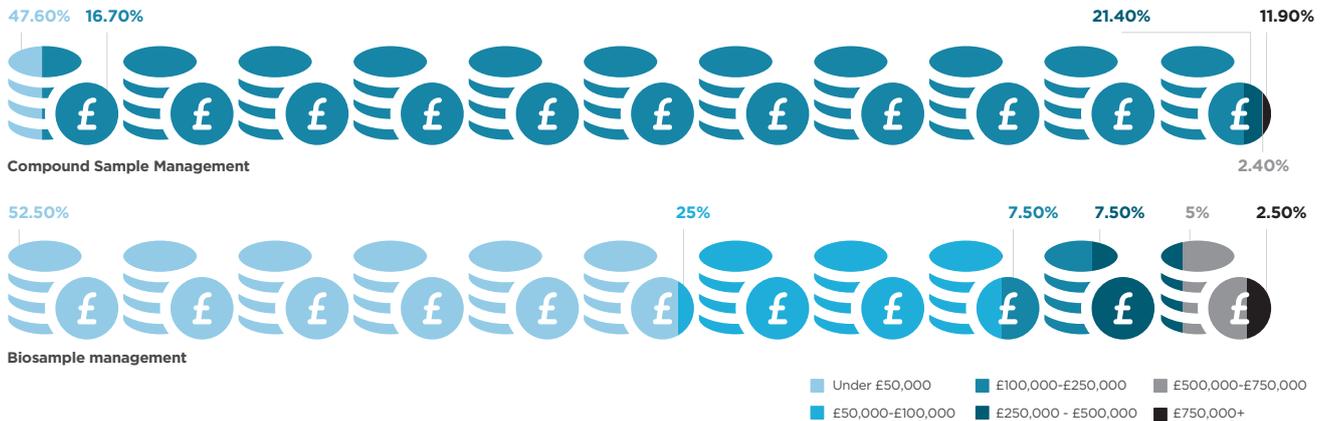
**Company Focus for 2017:** Collaboration is expected to remain a strong priority for both sectors, followed by focus on the quality and usability of samples for the biobank respondents. For the compound respondents, increasing process efficiency is forecasted to come slightly ahead of sample usability in the next coming 12 months.

## How is Your Team Size Likely To Change in 2017?



# Analysis: 2017 Projections

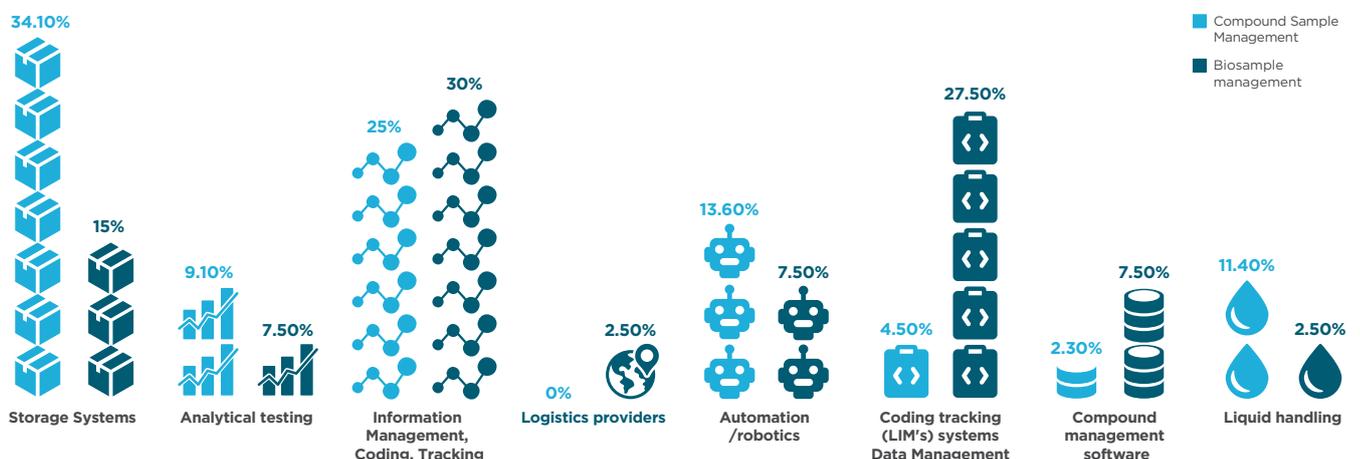
## How Much Are You Planning To Invest In Technology/Software?



**Spend Priorities:** The compound management crowd appear to be more committed to spending more on technology and software for 2017 with 34% stating they are investing over £250,000 this year. The majority of the biosample management crowd expect to invest under £50,000 in tech and software in 2017, similar to the planned budgets stated in 2016's report. Last year's report didn't seem to capture such an economical commitment towards tech and software from the compound management respondents, so it's encouraging to see this increase.

**Portfolio additions:** The compound management crowd appear to be more committed to spending more on technology and software for 2017 with 34% stating they are investing over £250,000 this year. The majority of the biosample management crowd expect to invest under £50,000 in tech and software in 2017, similar to the planned budgets stated in 2016's report. Last year's report didn't seem to capture such an economical commitment towards tech and software from the compound management respondents, so it's encouraging to see this increase.

## What technologies/software do you plan to add to your portfolio?



# Closing Remarks:

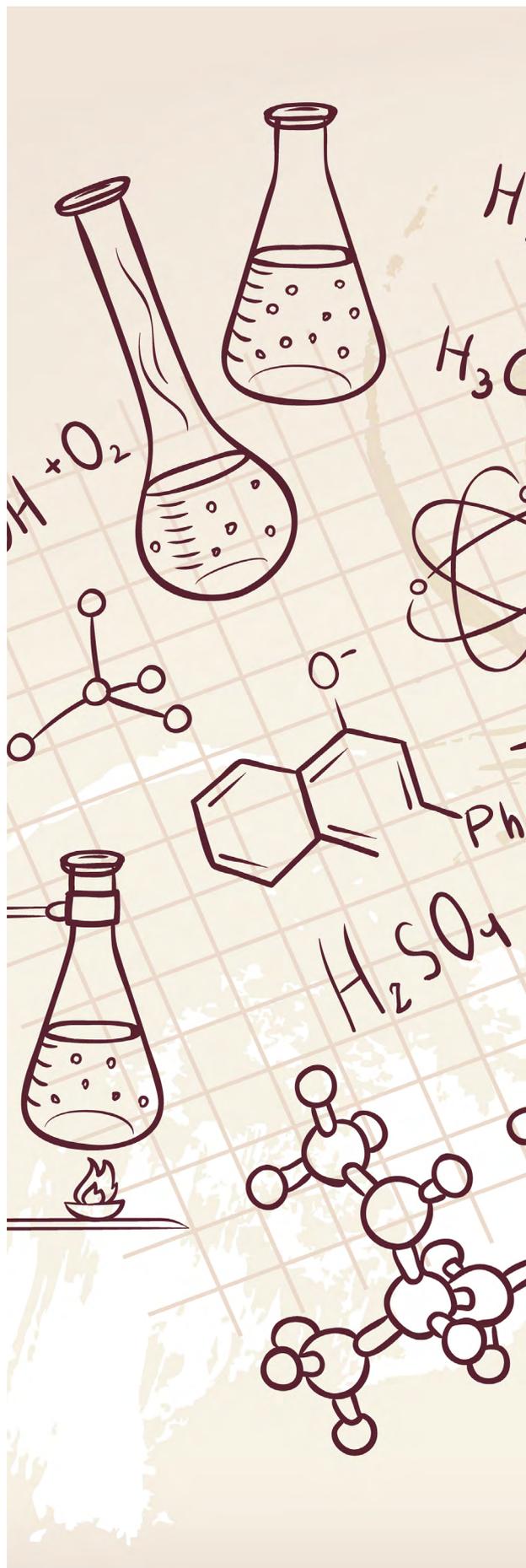
Both industries continue to enjoy stability, according to our findings. No respondents saw a significant drop in team size on the biosample side and only a minority of respondents saw a great decrease in regards to compound management. Compound management seems to be experiencing a steady plateau in team size whereas the biosample management crowd are venturing to enjoy some growth which isn't expected to stop anytime soon.

IT issues are noted by both crowds as a considerable challenge. Biosample respondents flagging machine breakdowns, tracking and inventory issues and compound looking to reduce cost for laboratory equipment and management. One compound member noted troubles with managing compounds in different formats (solid, solution, different containers) in automated mode. Looking at new technology and software to be added to portfolios, storage systems are high up on the wishlist for the compound management industry followed by automation and tracking is a dominant objective for the biosample management professionals.

Looking towards 2017, collaboration is expected to remain a strong priority for both sectors with process efficiency improvements are due to be a higher priority than sample usability in the next coming 12 months for the compound management professionals.

Expected hurdles for the year ahead for the biosample crowds include cost, cold chain management and finding the right collaborations. Compound sample management hurdles include equipment reliability and operational excellence - to be streamlined, efficient but also show flexibility for clients.

Thanks to all those who contributed to this research



Collaborate, maximise quality, develop effective data management and capitalise on outsourcing for cost effective compound management and biobanking

With more and more areas of convergence between compound and biosample management, Pharma IQ, the leader in pharma events, is proud to bring new the newly rebranded Compound and Biosample Management Summit.

## Agenda Highlights:

### **-How We Insourced Our Collection and Increased FTE Dramatically –**

Discover the strategies Dart Neuroscience used to save costs and increase efficiency in their sample management systems

### **-Future Proof Your Sample Management by Investing in Latest Technologies**

– Take inspiration from MedImmune’s next generation operations to give you reliability and efficiency in your lab

**-Addressing the Challenges of Reconciling and Transferring Biological Asset Inventories to Automated Systems** – Discover why GSK are vastly increasing their laboratory automation, and decipher the challenges of consolidating, reconciling, and automating a variety of biological asset inventories





## About Pharma iQ

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