

Sneak Peek

Commercial Functions for CDMOs



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SYMMETRIC

Background

01

A heavily fragmented space; a fiercely competitive space

Contract Development and Manufacturing Organisations (CDMOs) are vendors focused on development and manufacturing operations they conduct on behalf of sponsors. Generally speaking, they can be segmented based on focus areas, eg **Drug Substance or Drug Product**, modality, eg **Small Molecules, Large Molecules (“Biologics”), Cell and Gene Therapies**.

Major CDMOs Revenue (2023)

- 1) Lonza: \$7.8B
- 2) Thermo: \$7B
- 3) Catalent: \$4,1B
- 4) Samsung: \$2,7B
- 5) Wuxi: \$2,4B
- 6) Siegfried: \$1,5B
- 7) Recipharm: \$1,4B
- 8) Fujifilm: \$1,4B
- 9) BI: \$1,2B
- 10) Millipore: \$0,9B

- The global CDMO market is ca. **\$200B (\$150-250B)**, with **6-9% growth rates****
- The aggregate revenue of the **Top 10 players (\$30b)** commands **15% of market share**
- **>70% of CDMOs invoice <\$50 million** – ie, plenty of small players vying for attention!
- Overall, it is still a very attractive space, but **the challenge is to stand out from the lot**

Grand Total: **\$30,24B (+7% vs. 2022)**

**Nova1Advisor/Fortune/Grand View Reports*

***DCAT Value Chain Insights*

Source: Dr. Eduardo Jule, Evolve Consulting

The Relevance of CRM Tools



Customer Base

Win/Loss Analysis

Implementation

WIN Reasons

- A
- B
- C
- D

LOST Reasons

- A
- B
- C
- D

You run this exercise to:

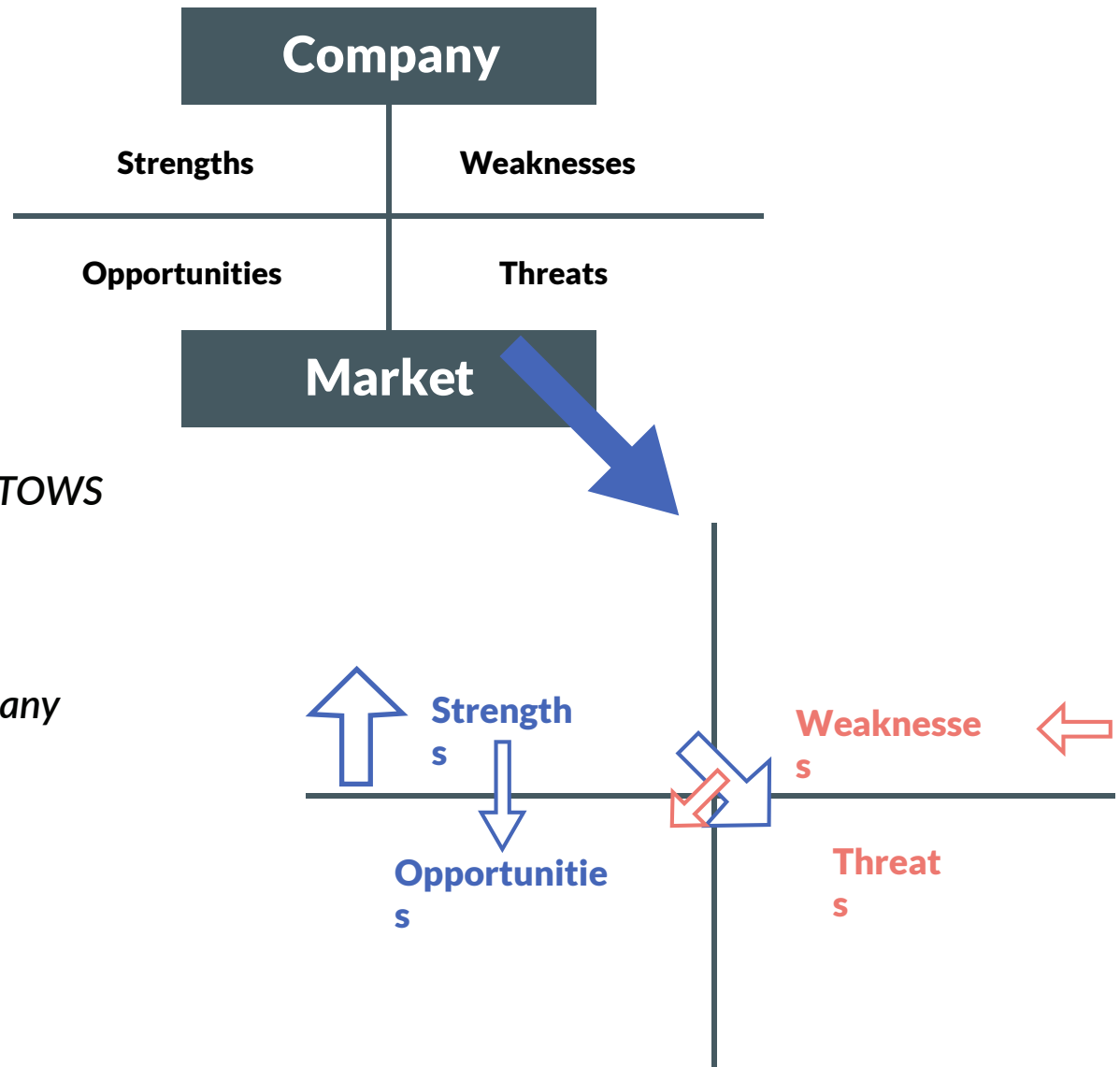
- Gain intelligence/feel for market, ie are you winning for the right reasons? Are you losing for the wrong reasons?
- Augment VP/course correct where needed, ie what are you doing/planning to do to address the above challenges?
- *How often are you running this analysis? When was the last time you defined your Ideal Customer?*

Source: Dr. Eduardo Jule, Evolve Consulting

Planning

Business and Account Plans

Turning SWOT into TOWS



The idea is to convert your SWOT Analysis into a TOWS based Action Plan:

- Amplify **S**, leverage to seize **O**
- Tackle any **W** under relative control, connect to any obvious **O** where possible as an opp to grow
- Substantiate VP, message to existing, new and potential Customers
- Through **S**, minimise or circumvent **T**

Source: Dr. Eduardo Jule, Evolve Consulting

Commercial Functions



Bonus

What is in a Value Proposition?

The *Value Proposition* is associated to *why* anyone would want to do business with you. Here, we need to flip things around and see from the perspective of *what your Clients can achieve working with you*

Methodology

- *Identify Clients main problems*
- *Identify all the benefits your products/solutions offer*
- *What makes these benefits valuable?*
- *Can we connect value to Client problems?*
- *Can we differentiate your Company as preferred provider?*

Source: Dr. Eduardo Jule, Evolve Consulting

Map Out

Goals and Needs

As often with Account Management, begin with the END in mind. Think —but then validate or adjust— of what sort of Account you want to be in charge of, eg by the end of the year, in 3 or 5 years. Current Challenges need to be guided and at some point corroborated by the Account itself.

Goals relate to what the Client is trying to achieve.

Be candid as to what you know your Client **needs**, but also creative about your Client **MAY** need or **MAY NOT KNOW HE NEEDS**.

- **Current Challenges**
 - For example, “Capacity limitation management — specifically for packaging testing”
- **Growth Opportunities**
 - To be determined

Growth Opportunities should primarily relate to Add-on business (but not just), so feel free to be CREATIVE and think outside of the box! Remember, insight leads to identifying unconsidered needs that get you out of the commodity box.

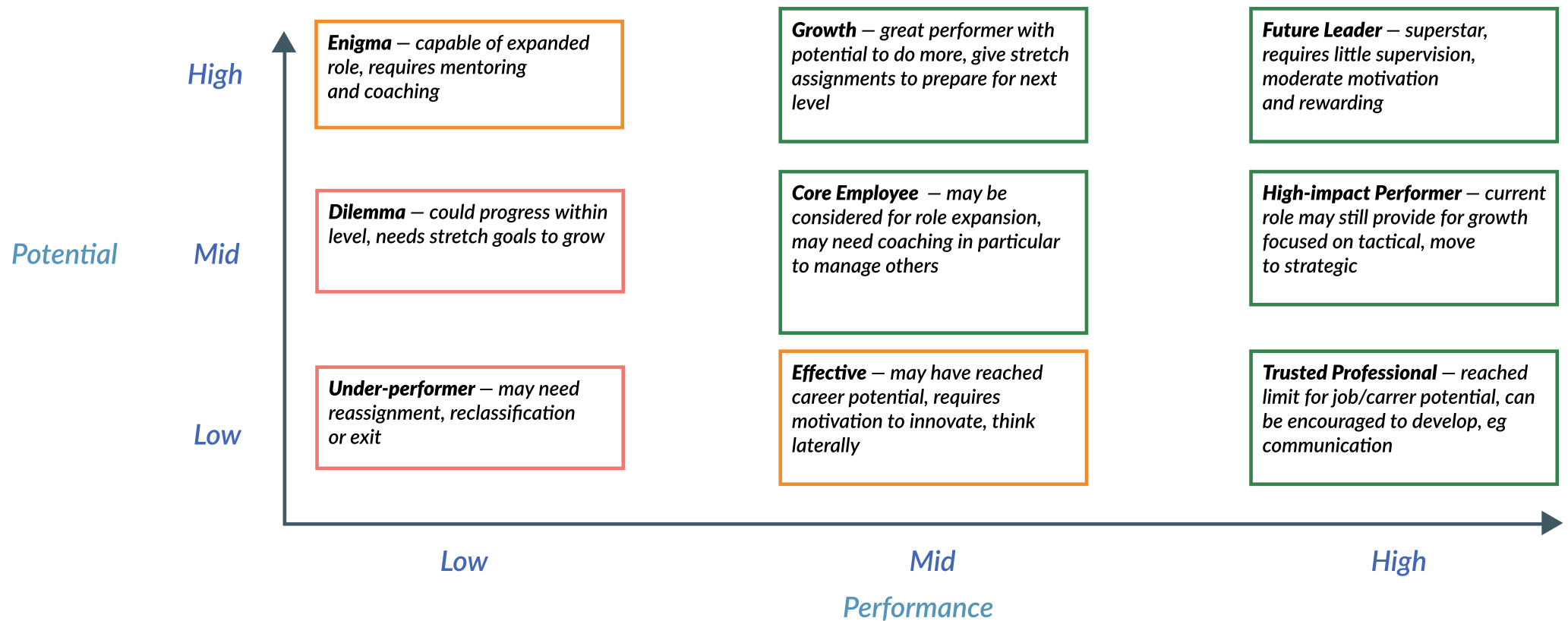
Source: Dr. Eduardo Jule, Evolve Consulting

Developing a People Matrix



Potential vs. Performance

What you want out of it



Source: Dr. Eduardo Jule, Evolve Consulting

Registration

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