



Impact Assessment

Supply Chain Transformation in the Pharmaceuticals Sector

Report Abstract

January 2023

John Willmott

CEO

NelsonHall

19 pages

Contents of Full Report

1. Summary of Supply Chain Transformation in the Pharmaceuticals Sector
2. Supply Chain Administration & Operations Expenditure
3. Time Required to Implement Supply Chain Volume Change
4. Requirements from Optimized Supply Chains
5. Supply Chain Transformation Initiatives Planned
6. Vendor Involvement in Supply Chain Transformation Initiatives

Who is this Market Analysis for?

NelsonHall’s “Supply Chain Transformation in the Pharmaceuticals Sector” report is a survey of supply chain leaders in pharmaceuticals firms to ascertain the extent and nature of the demand for supply chain transformation as a result of dramatic economic changes and supply chain disruption. In particular, the report identifies supply chain leader requirements from optimized supply chains, the patterns of supply chain transformation initiatives planned, and expectations from vendor involvement. The report is designed for:

- Vendor marketing, sales, and business managers wishing to understand the nature of the requirement for supply chain transformation in the pharmaceuticals sector
- Pharmaceutical sector executives interested in understanding supply chain transformation intentions among their peers
- Financial analysts and investors specializing in the pharmaceuticals sector who are looking to understand the impact of the dramatic economic changes arising from mismatches between supply and demand “post-Covid” and exacerbated by Russia’s invasion of Ukraine on the pharmaceutical sector’s supply chain transformation strategies.

Key Findings & Highlights

NelsonHall’s analysis of supply chain transformation in the pharmaceuticals sector consists of 19 pages. The report identifies that:

- Less than a third of supply chain leaders in the pharmaceuticals sector are highly satisfied with their level of straight-through order processing, level of manual touch-points and hand-offs, demand forecasting accuracy, and ability to predict, sense, and adjust in real time
- 31% of pharmaceutical enterprises have active or planned supply chain transformation initiatives over the next two years
- There is a 51% net change in favor of increased supply chain operations outsourcing relative to insourcing.

This report is one of a series of detailed individual sector reports on supply chain transformation published by NelsonHall.

Scope of the Report

The report analyzes supply chain transformation requirements and intentions across major pharmaceutical firms globally and addresses the following questions:

- To what extent are pharmaceutical firms intending to outsource or insource more of their supply chain operations?
- What are the key areas of supply chain optimization over the next two years?
- How long does it take the logistics and supply chain functions within pharmaceutical firms to scale their operations up or down by 20%?
- What are the key challenges within pharmaceutical sector supply chains?
- How adequate are existing supply chain processes and business models in the pharmaceutical sector to support the future needs of the business?
- What benefits and characteristics are sought from optimized supply chains in the pharmaceuticals sector?
- What supply chain transformation initiatives are planned by pharmaceutical firms over the next two years?
- Which technologies are perceived as key within supply chain transformation by pharmaceutical sector supply chain leaders?
- To what extent will pharmaceutical firms involve vendors in their supply chain transformation initiatives, and in which areas will they consider using a managed service?

The sectors covered in this series include:

- Automotive
- CPG
- Energy
- Healthcare providers
- High-tech
- Pharmaceuticals
- Retail
- Telecoms
- Transportation
- Travel
- Utilities.

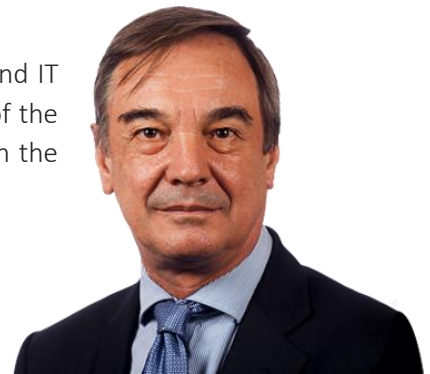
The regions covered are:

- North America
- EMEA
- Asia Pacific.

About The Author

John is CEO of NelsonHall, the leading business process services (BPS) and IT services (ITS) research and analysis firm, and is widely regarded as one of the world's leading authorities on achieving business transformation through the application of BPS. John can be contacted at:

- Email: john.willmott@nelson-hall.com
- Twitter: [@John_NH](https://twitter.com/John_NH)



About NelsonHall

NelsonHall is the leading global analyst firm dedicated to helping organizations understand the 'art of the possible' in digital operations transformation. With analysts in the U.S., U.K., Continental Europe, and Asia, NelsonHall provides buy-side organizations with detailed, critical information on markets and vendors (including NEAT assessments) that helps them make fast and highly informed sourcing decisions. For vendors, NelsonHall provides deep knowledge of market dynamics and user requirements to help them hone their go-to-market strategies. NelsonHall's research is based on rigorous, primary research and is widely respected for the quality, depth, and insight of its analysis.

We would be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager: Guy Saunders at guy.saunders@nelson-hall.com

Boston

Riverside Center, 275 Grove Street, Suite 2-400, Newton Massachusetts 02466
Phone: +1 857 207 3887

London

Unit 6, Millars Brook, Molly Millars Lane, Wokingham, RG41 2AD
Phone: +44 (0)203 514 7522

Paris

115 rue de Reuilly, 75020 Paris
Phone: +33 (0)6 23 81 17 54

Copyright © 2023 by NelsonHall. All rights reserved. No part of the publication may be reproduced or distributed in any form, or by any means, or stored in a database or retrieval system, without the prior written permission of the publisher. The information provided in this report shall be used only by the employees of and within the current corporate structure of NelsonHall's clients, and will not be disclosed to any other organization or person, including parent, subsidiary, or affiliated organization without prior written consent of NelsonHall. NelsonHall exercises its best efforts in preparation of the information provided in this report and believes the information contained herein to be accurate. However, NelsonHall shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided.