

Efficiency Benchmarking for Pharmaceutical Sector

Presentation of the Pharmaceutical Benchmark

Barcelona, 9^h of July of 2026

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Who we are

ManageArt is focused on Pharmaceutical Industry, and we cover from strategy definition to performance improvement programs.

What we do in Pharma?

Strategic level:

Strategy plans and key decision-making support

Organization level:

Reorganization and restructuring

Operative level:

Performance improvement programs

Example of projects in Pharma

- Industrial strategy definition
- Supply Chain strategy definition
- Benchmarking for European Pharma Industry: Exben
- Make or Buy decisions for Industrial plants
- Strategy definition for CMO Business Unit

- Implementation of post-merger strategy
- Define organization for a new strategy implementation
- Operation Excellence projects
- Balance Scorecard for Industrial Area

- Improve Productivity of pharma production lines
- Implementing Cost cutting projects
- Reduce inventory levels without any impact in OTIF
- Reduce Production and Release cycle time
- Reduce time of change of formats increasing OEE

Exben has been working for several companies of the Chemical and Pharma sector, always helping them to improve results in industrial field.

Some of our clients

ESTEVE

almirall

TEVA

Lilly

cinfa

ferrer

MERCK

gsk
GlaxoSmithKline

NOVARTIS

inibsa

janssen

CHEMO

Milab
Cuidado para ti

ROVI

KERN
PHARMA

CASEN RECORDATI

Pharmex

Generis

SANOFI

SOFA RIMEX

Lacer

Roche

LUSO
MEDICAMENTA
Winning Partnership

MSD

IBERFAR
INDUSTRIA FARMACÉUTICA S.A.

FAREVA

DEMO

Boehringer
Ingelheim

GRUPO
MENARINI

Recipharm
good for business

Uriach

Zambon

CyndeapHARMA

NEURAXPHARM

SERVIER

ITALFARMACO

REIG JOFRE
Group

LABIANA

ANGELINI

SALVAT

ALVEN

ERN

MOLTENI
FARMACEUTICI

bluepharma

FARMALABOR

basi
laboratorios

ABIOGEN
PHARMA

Synthon

Johnson-Johnson

TOWA

Rubió

NOUCOR

BRAUN

NORMON

meiji
Meiji Pharma Spain, S.A.

Siegfried

Pharmaceutical Industry Benchmark

How much is a tablet? How much does it cost? The high-pressure market situation struggles laboratories' prices and profits.



0,9 € x 10 gums



0,09 € / unit



1,98 € x 40 tablets



0,05 € / headache!

The study analyzes manufacturing performance by process, industry and product types.

Geographical Scope

Europe-focused benchmark

- > Austria > Italy > Switzerland > France
- > Germany > Spain > Portugal > Latam



Process Scope

Total Supply Chain

- > Inbound supply > Order management
- > Inventory management > Manufacturing efficiency
- > Demand planning > Indirect costs



Industry Scope

Pharmaceutical manufacturers by

Type of molecule

- > Small molecules

Patent status

- > Protected
- > Generic

> CMO



Product Scope

Production (bulk) and conditioning (filling+packaging) of

- > Solids¹⁾ > Steriles
- > Liquids > Inhalers
- > Semisolids



1) (tablets, capsules, granulates) x (sachets, pouches, blisters, bottles)

Production plants involved in the Benchmark present different characteristics that allow us to segment by different criteria (1/2)

	% of plants (*)		N° of plants
Production under 30 Million of units	49%	CMO	55%
Production between 30 and 60 millions of units	35%	Generics	53%
Production above 60 millions of units	16%	Innovative branded	20%
		FDA (**)	31%

(*) Data of year 2024

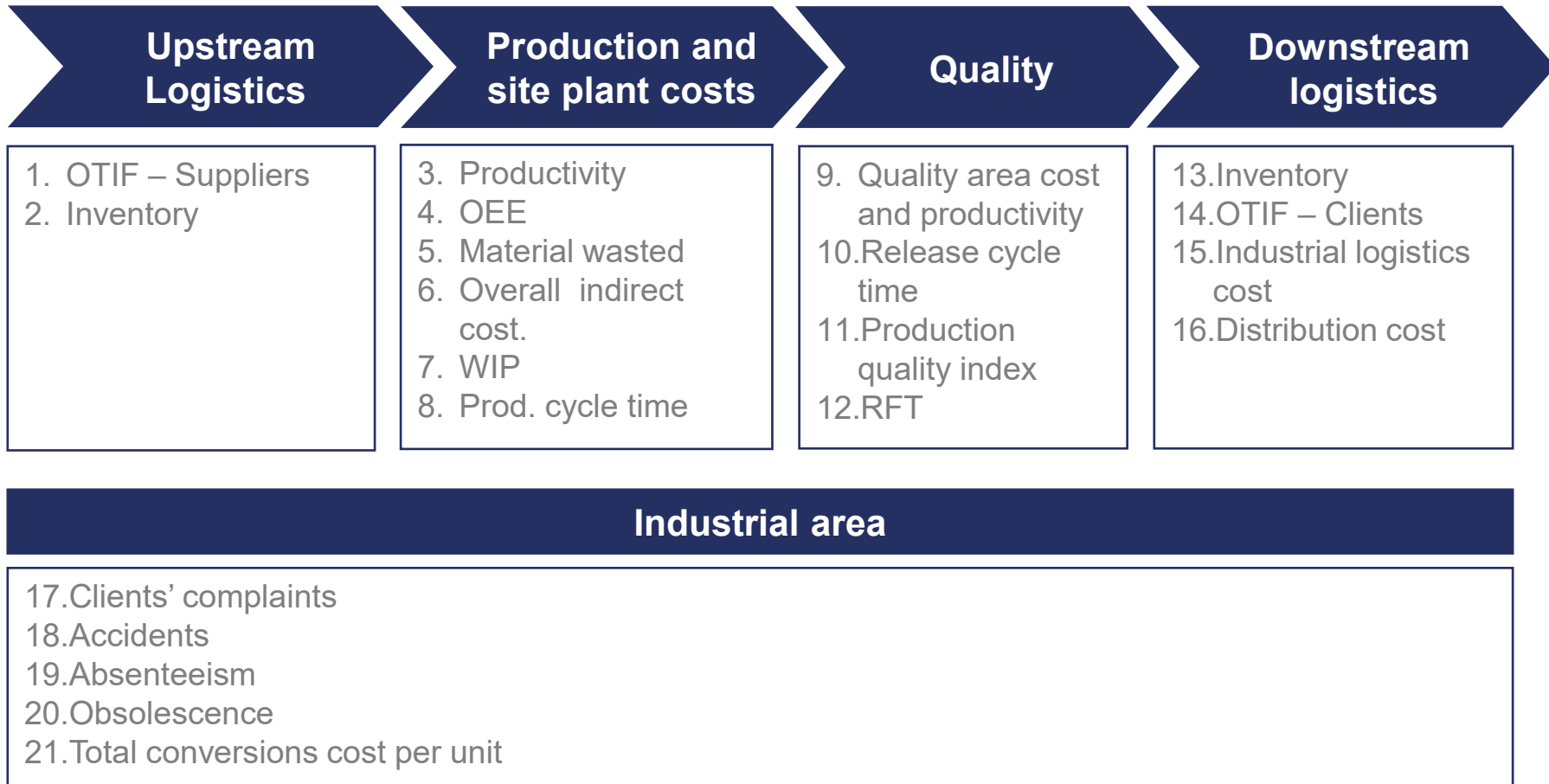
(**) FDA certified or in process of certification

Production plants involved in the Benchmark present different characteristics that allow us to segment by different criteria (2/2)

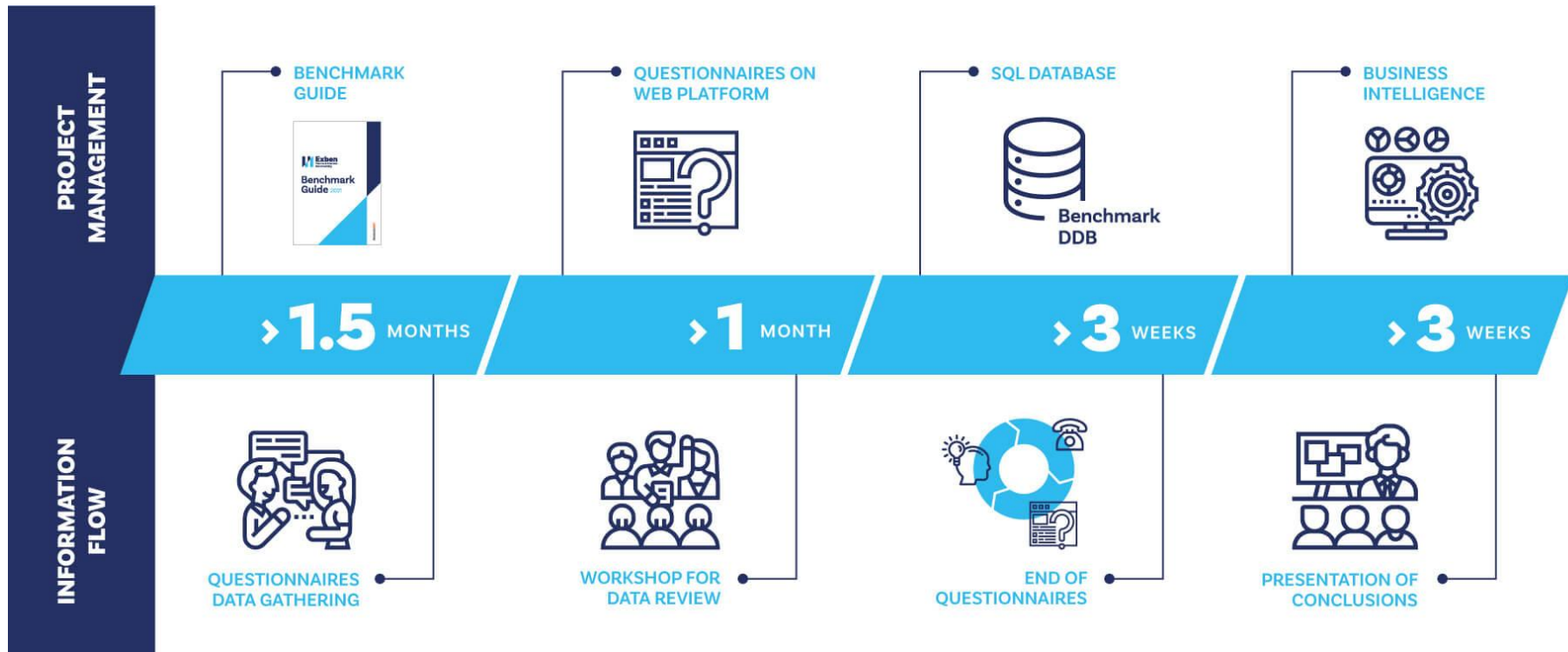
	N° of plants		N° of plants
Solids - Tablets	63%	Non-sterile Liquids	65%
Solids - Capsules	59%	Sterile (Amp/vial/PFS)	43%
Solids – Powder in sachets	53%	Creams	45%
Solids – Powder in bottle	18%	Suppositories	8%

(*) Data of year 2024

The Operational Guide and the Web Platform matches exactly with the 21 KPI structure.

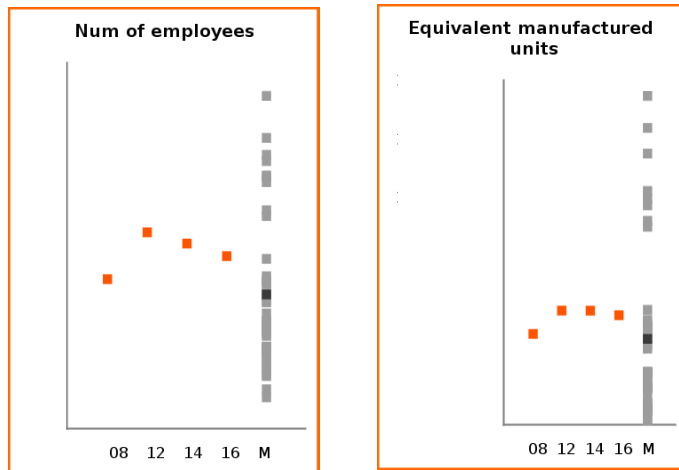


The benchmarking will be conducted in close interaction with you – Final presentation and discussion of customized results.



The final report starts with a basic profile of your company and an executive summary of the benchmarking results.

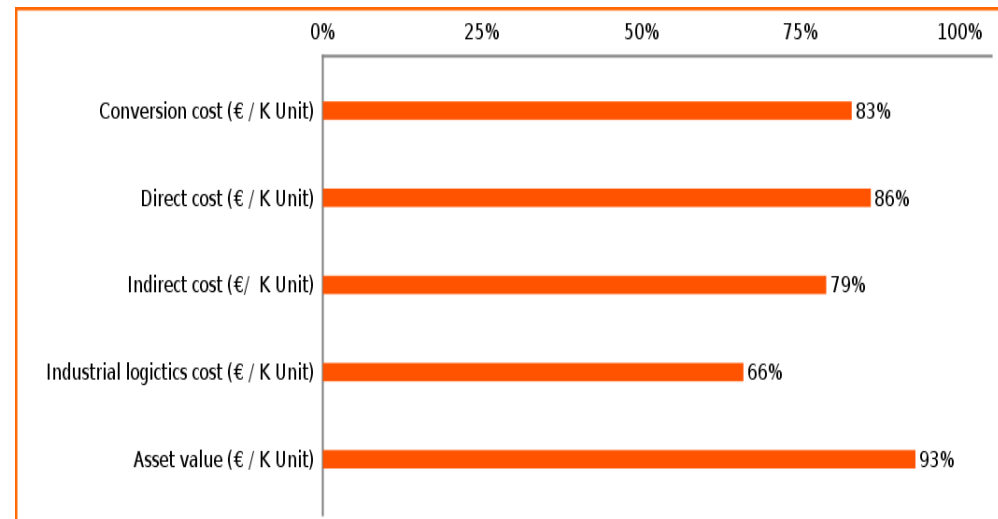
Part 1: Basic profile of the company



Examples – orange point is analyzed company

- Basic profiles help to locate company within the benchmark
- Allows first conclusions on general level

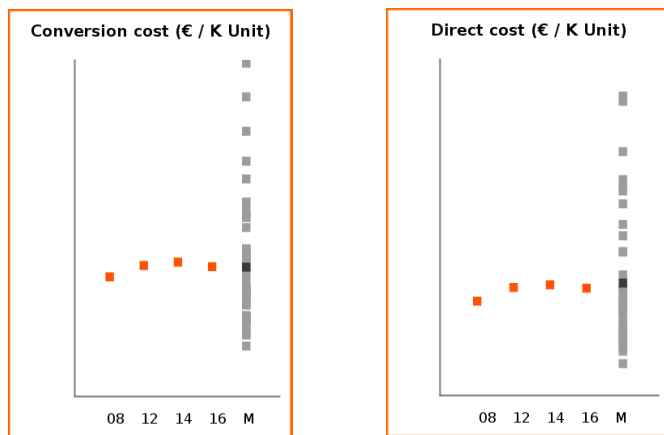
Part 2: Executive summary



- Summary of company performance using high-level indicators

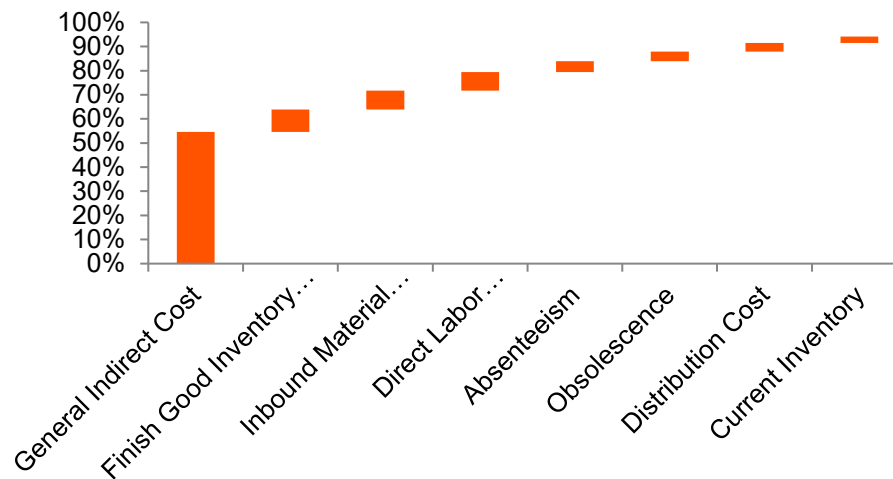
The second part of the report features a detailed analysis of the performance indicators and analyses improvement potential.

Part 3: Detailed performance indicators



Examples – orange point is analyzed company

Part 4: Potential analysis and recommendations



- Detailed indicators are compared with the competition
- Indicators evaluated in every conceptual block

- Gap potential in % per indicator evaluated on Top 3 company basis (best-of-benchmark)
- Savings potential in EUR derived

The second part of the report features a detailed analysis of the performance indicators and analyses improvement potential.

Block 1

Total conversion cost

- Conversion cost per produced unit: Total, direct, indirect, and industrial logistics
- Assets value per produced unit

Block 2

Supply Chain efficiency

- OTIF supplies, OTIF clients
- Inventory: RM, WIP and FG
- Cycle time: production and quality

Block 3

Efficiency Manufacturing

- Productivity and efficiency of direct labor
- OEE
- Material waste
- Production quality index and RFT

Block 4

Quality Costs

- Routine activities productivity
- Non routine activities productivity
- No. of audits
- No. of references

Block 5

General industrial area

- Clients complaints
- Personnel: Accidents index. Absenteeism ETTs index
- Obsolescence

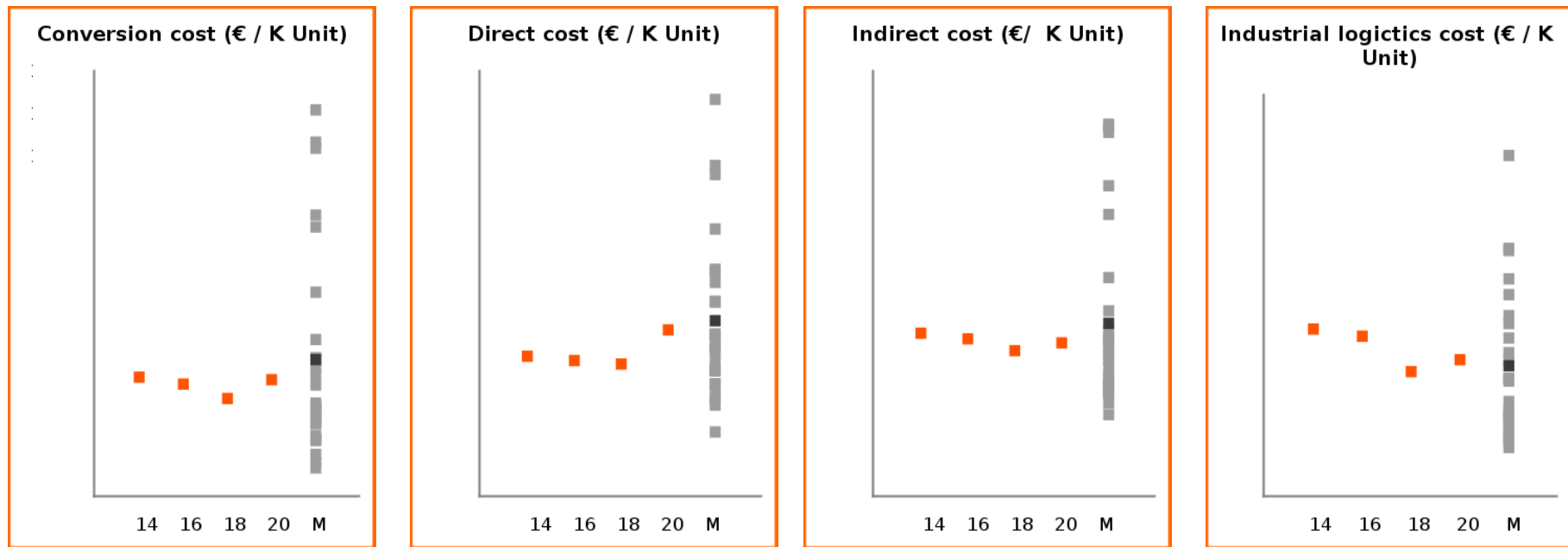
Block 6

National Distribution

- Distribution cost per unit sold; storage & preparation and transport
- Inventory rotation of finished product
- Clients OTIF

Total conversion cost is split by three main components: direct cost, indirect costs and industrial logistics.

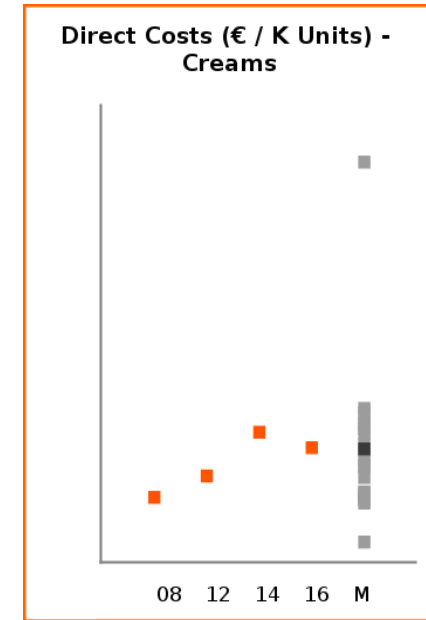
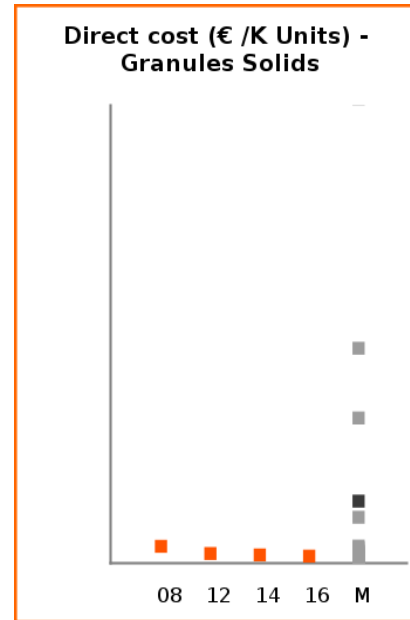
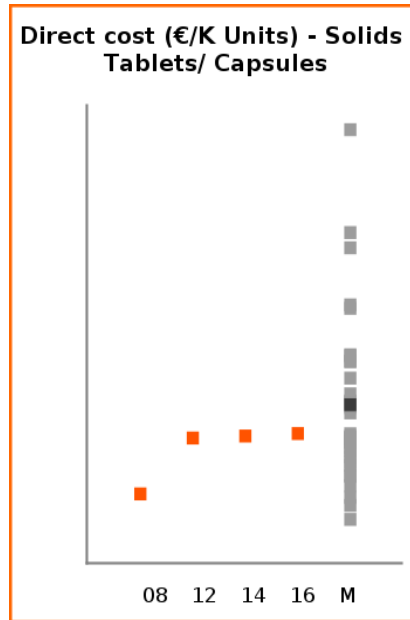
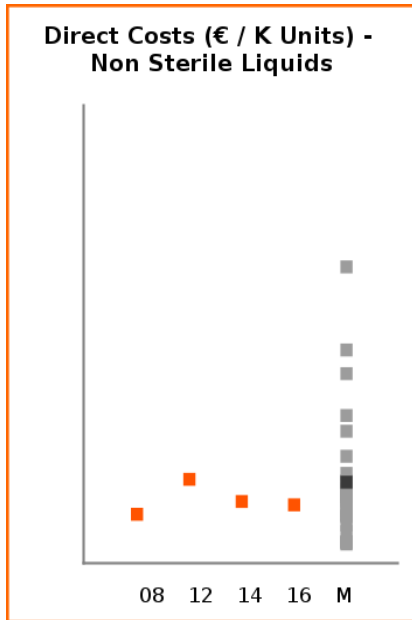
EXAMPLE



Costs can be analyzed segmenting for specific criteria to create and homogeneous peer group

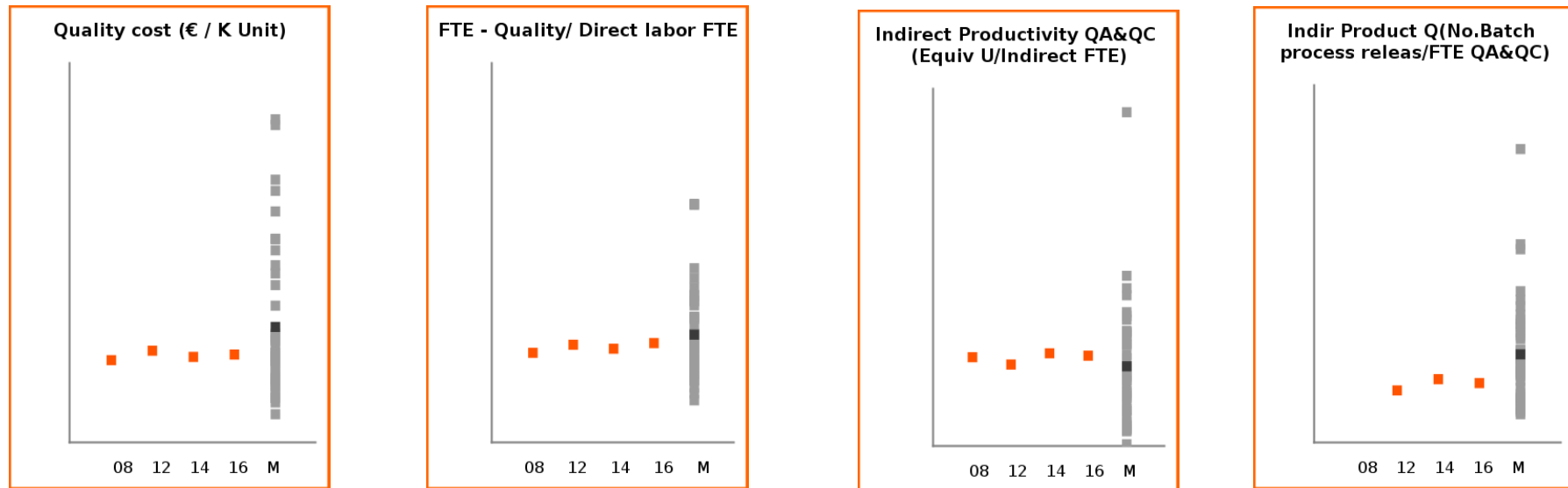
Direct costs are presented by the different pharmaceutical forms.

EXAMPLE



Indirect costs are detailed in five chapters: indirect and staff production, quality, planning and supply, engineering and maintenance, internal logistics and cost of energy.

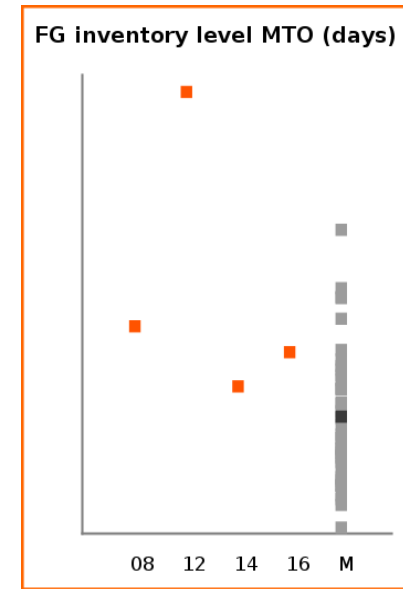
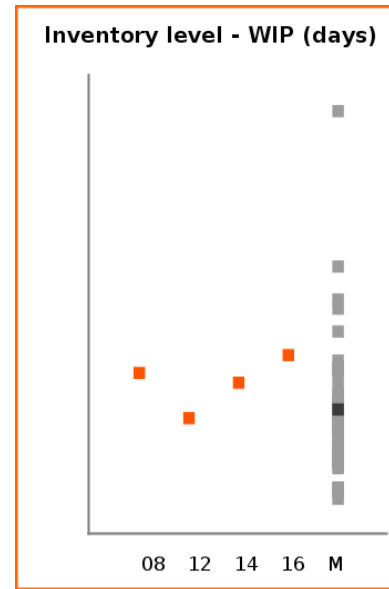
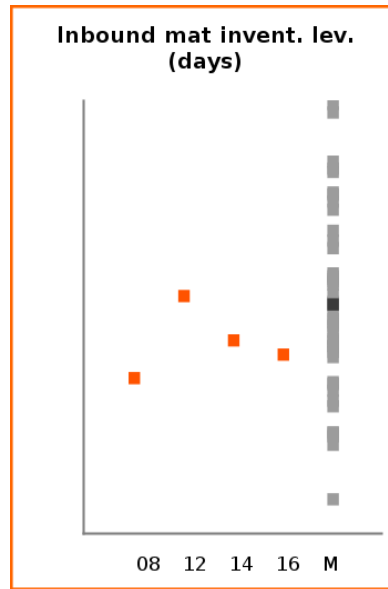
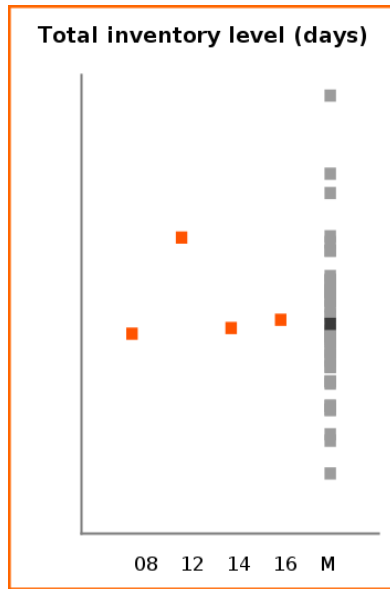
EXAMPLE



Quality costs are covered by a specific chapter, splitting routine and non routine activities.

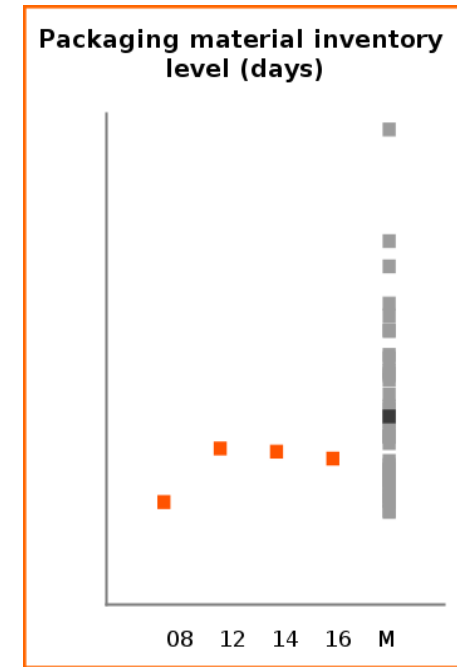
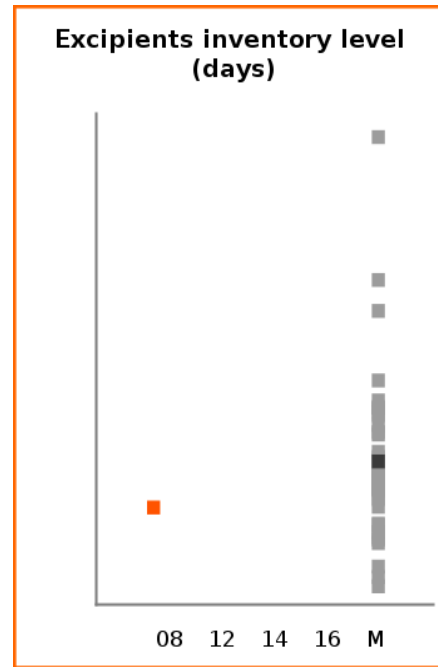
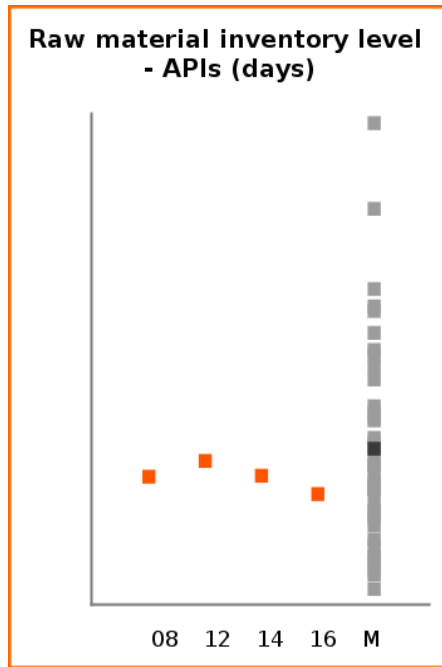
Inventory rotation is measured as in the aggregated of the industrial inventories as in its three components: inbound materials, WIP and finished goods.

EXAMPLE



Inbound inventory is divided into API's, Excipients, Packaging material and WIP from third part.

EXAMPLE

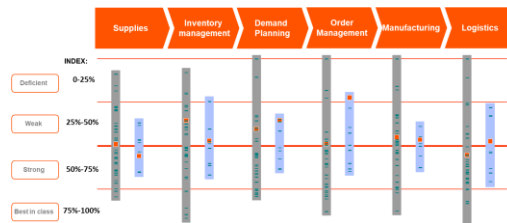


Forum of Pharma Industry in Iberia

A Forum oriented toward the promotion of synergies had been set up among participants in the Benchmarking

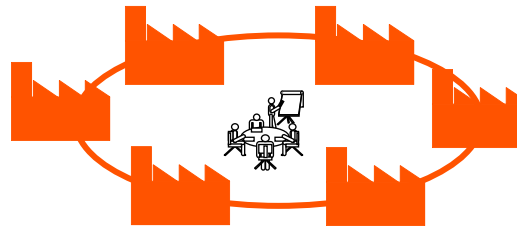
2009

1st Edition of Pharma Benchmark



2011

2nd Edition of Pharma Benchmark & Foro's Launching



2012

Export: 1st country Portugal



2013 -2014

IT improvement & Adding Value to Benchmark



2015-2016

European Export Plan



2018-Present

Foro's Consolidation



**32 Companies
>40 Sites**



**>20 Groups
> 500 Employees**

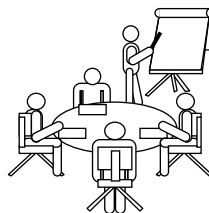
Among several of the participants in the Benchmarking a Forum oriented toward the promotion of synergies has been set up

Laboratories members of the Forum



The forum is organized by groups in three different levels. The aim is to connect people with same problems and to identify room for improvement among them

Forum Meetings



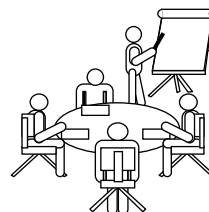
- 3 annual meetings
- 32 Labs / 43 plants
- 1-2 members (Industrial responsible)
- Follow up of Forum activities
- New ideas to promote inside the group
- Visit to the plant
- Best in class / Topic of interest presentation
- Industry 4.0 pill.

Working Groups



- Laboratories interested
- Knowledge exchange
- Synergies in new issues
- Synergies in cost

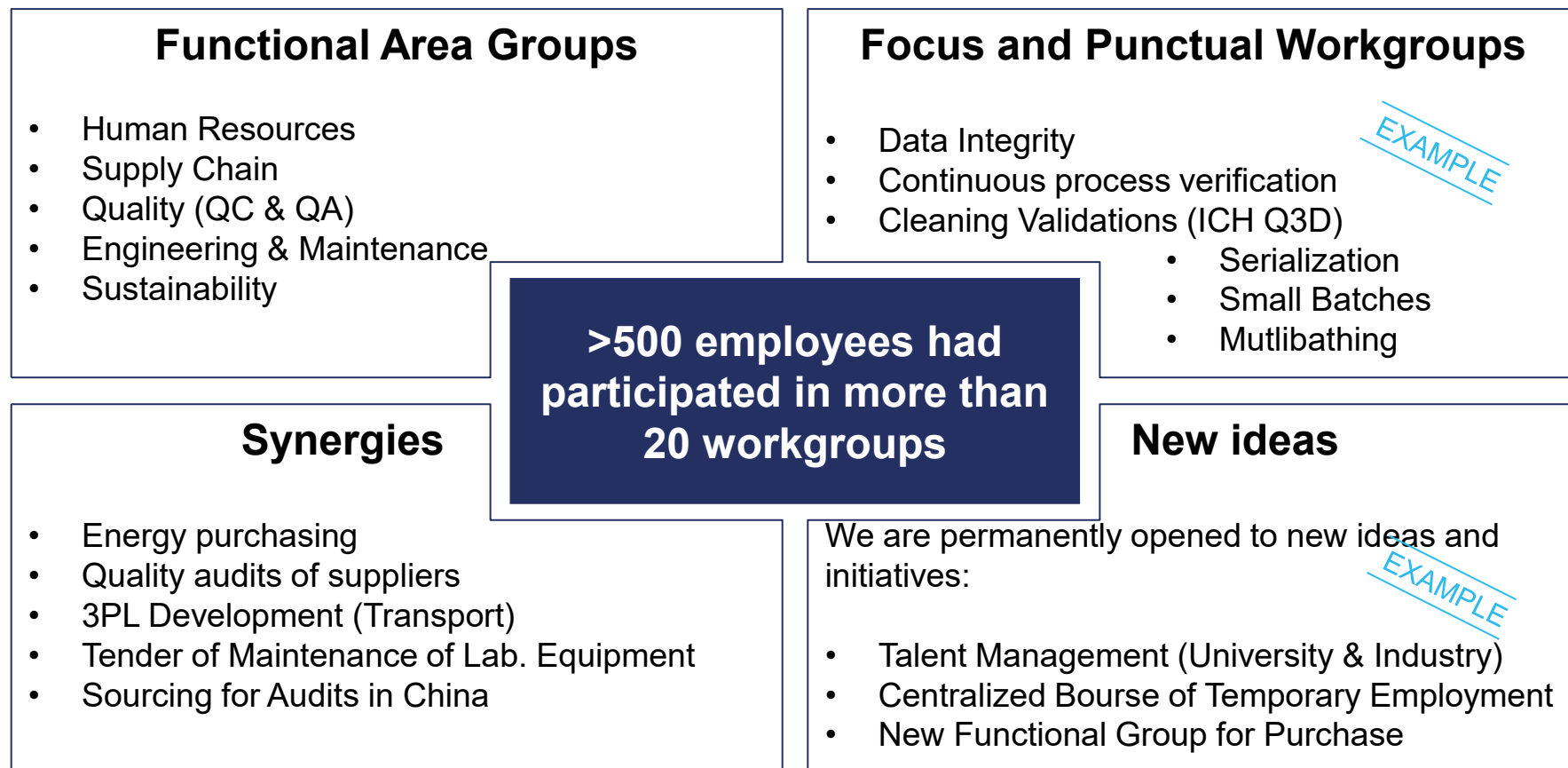
Training Sessions



- Regulatory framework
- Best practices
- New projects
- Specialization of plant
- Networking

EXAMPLE

Different kind of workgroups have been created from the initiative and challenges of different participants of the Forum



After several year since launching benefits for participants have been reached and continuous ideas are analysed in order to increase the value for the group

What is the Benefit for the site

- Knowledge and experiences
Exchange among participants.
- Access to synergies among
companies.
- Access to network among Industrial
Directors and functional areas.
 - Share of challenges / concerns
 - Share of approaches with new
regulatory topics / market trends

What is the Effort for the site

- Commitment in Forum participation
 - Access to an open visit of the
own plant
 - Prepare a topic / Best in class
- Commitment of 2 years of stay in the
Forum and participation in the
Benchmark every 2 years
- Cooperate in growth of participants
for the Benchmark

Thank you!

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