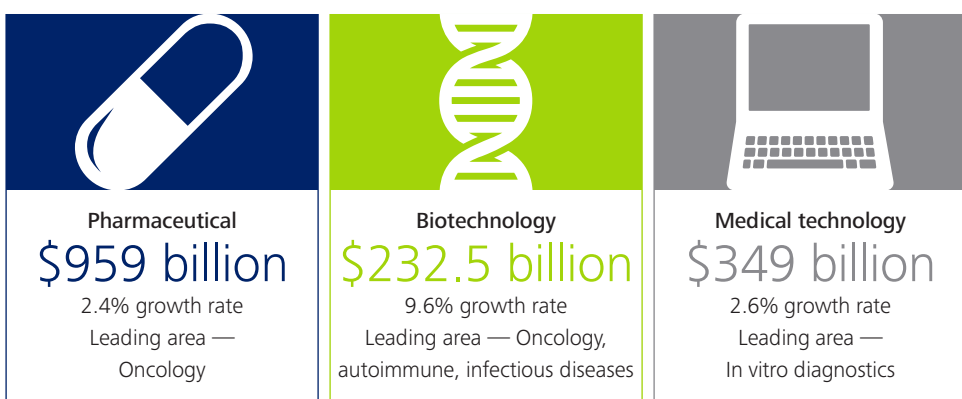


2014 Global life sciences sector outlook

Deloitte Touche Tohmatsu Limited's yearly look at the topics and trends in the life sciences sector, stakeholder considerations, and local market updates.

Sector overview



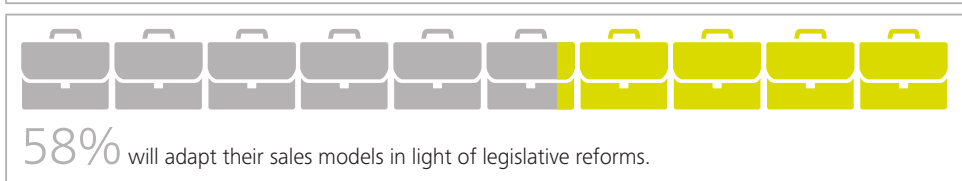
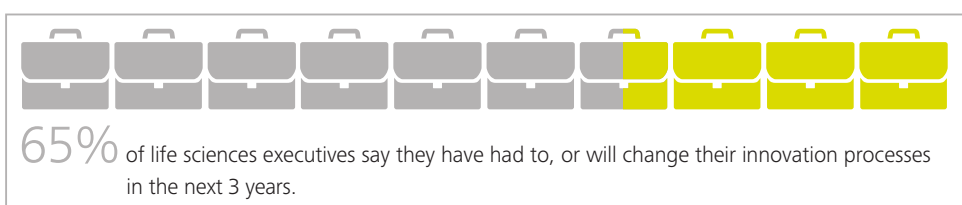
Growth drivers




Top issues and trends

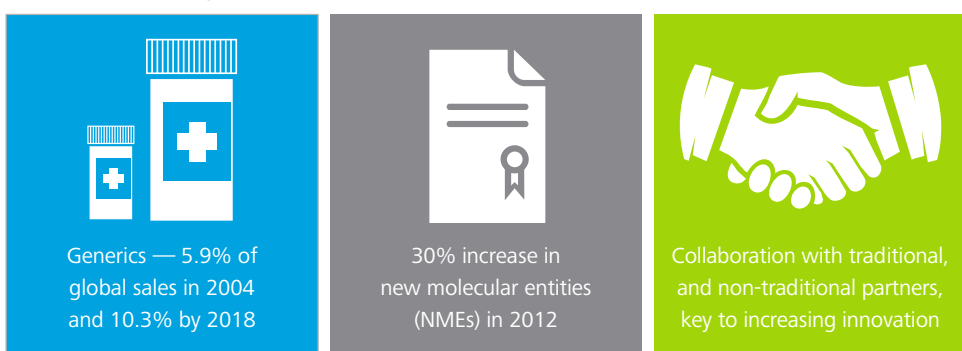
Issue one: Navigating global health care reform

Many countries implementing reforms to transform industry from a *Volume* — to a *Value-based* marketplace.



 price controls and increasing use of generics are common steps in cost containment.

Issue two: Delivering innovation and value



Issue three: Complying with regulatory changes

In the last decade, there has been a growing list of regulatory requirements or expectations imposed on the life sciences sector

Security & privacy
 Government policies and mandates
 Intellectual property protection
 Drug safety Counterfeiting
 Corruption

Issue four: Operating in a smaller and connected world

