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European Federation of Pharmaceutical Industries and Associations

EFPIA Day 2025 Press Conference

–Promoting Innovation and Access Through the EU-Japan Partnership–

21st of October 2025

EFPIA Chair, Stefan Oelrich

Pharmaceutical innovation is the foundation of a society that protects life, dignity, and quality of life of all people

Pharmaceutical innovation is a lifeline

From cancer to rare diseases, medical breakthroughs have saved lives and improved wellbeing, helping people live longer.

In a rapidly changing geopolitical landscape, the pharmaceutical industry must collaborate with stakeholders to drive innovations that improve patients' lives.

Regulatory disparities resulting in drug lag and loss

Decline in innovation capacity

Reduced competitiveness against the US and China

Reduced ability to adapt to changing disease trends and rising healthcare costs

Governments need to expand investment in pharmaceutical innovation and social security to address unmet medical needs

Need to implement **policies that aim to achieve a balance between promoting innovation and ensuring the sustainability of social security**

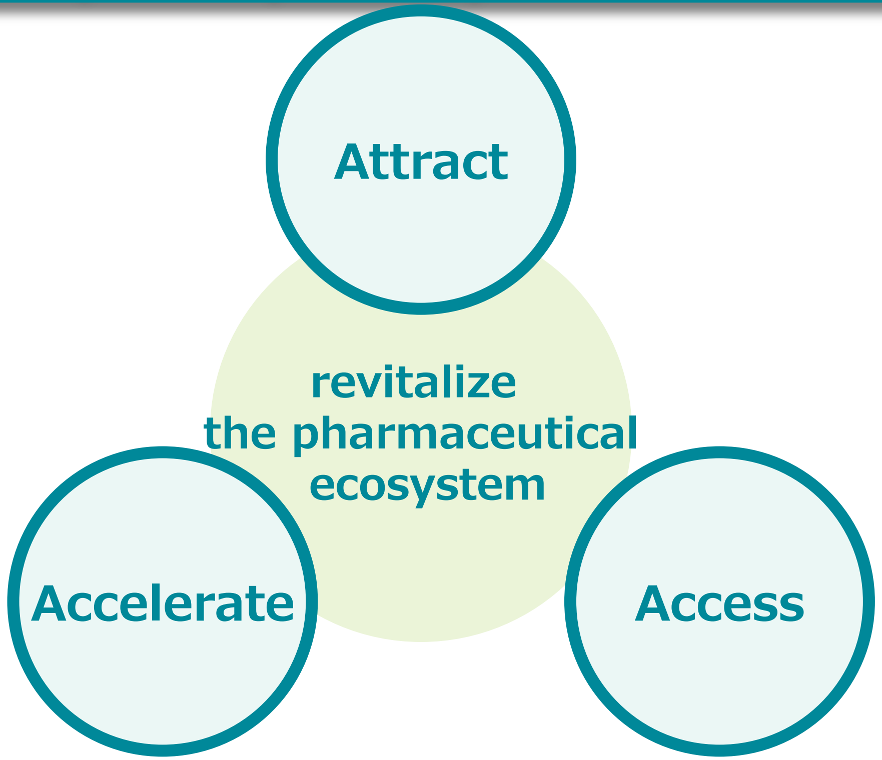
“3As” to realize visions : Optimization of Attract･Accelerate･Access

Common Key Words to optimize the policies in the EU and Japan respectively

Attract
Attract investment not only in funds but also in human resources, expertise, and infrastructure

Accelerate
Translate scientific excellence healthcare solutions to transform patients’ lives

Access
Ensure patients in both Europe and Japan benefitting from innovations without delay and disparity



Need to shift from short-term cost control to 'long-term value creation' and attract research investment, talent, and clinical development to Europe and Japan

Transforming challenges into growth opportunities

Attract

Fully leverage initiatives to realize long-term value creation through investment

- Initiatives to leverage in Europe and Japan
  - Europe: Utilize Horizon Europe and implement the recommendations of the Draghi Report
    World-class IP protection and investment incentives framework
  - Japan: Ensure the implementation of measures to create a drug discovery ecosystem for growth as a key industry

- **Build a resilient innovation system**

Europe and Japan, sharing common values, demographics, and industrial foundations, have the advantage of pursuing the common goal

Mutual Europe-Japan Partnerships

Accelerate

Accelerating new drug delivery through Europe–Japan collaboration.

- Common factors in Europe and Japan Demographics, values, and industrial strengths
- The need for an improved regulatory framework fit for life sciences innovation

- **Sharing best practices through dialogue**

Realize ‘a transformation towards an ecosystem where patients can equally benefit from innovations’ by increasing regulatory predictability and market attractiveness

Regulatory Predictability and Patient-Centered Growth

Access

Towards an ecosystem where patients can quickly and equitably access innovation

- Europe and Japan's initiatives to sustain this partnership and establish it as a global model for patient-centered innovation

- **Work with policymakers, patients, and industry as partners to formulate solutions**
- **Build an ecosystem where patients can benefit from innovations**

Policy Frameworks for Balancing Innovation and Sustainable Social Security

Attract

From short-term cost control
to long-term value creation through
investment and market predictability

revitalize
the pharmaceutical
ecosystem

Accelerate

Accelerating new drug delivery
through Europe–Japan
collaboration.

Access

Towards an ecosystem where every
patients can benefit from
innovations

With U.S. Most Favored Nation (MFN) pricing policies, Europe and Japan have a choice to make

Continue to manage growing healthcare needs with stagnant or tighter budgets

OR

Fundamentally rethink how healthcare is organized and financed.

Rather than viewing MFN pricing policies as external pressure, Japan and Europe should seize the **opportunity to move from short-term cost containment measures to long-term investment** in the health and productivity of people everywhere.

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Thank you