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Menarini Asia-Pacificâ??s Glen Godresse on reshaping biopharma commercialisation across Asia

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Regional partnerships, earlier market planning and locally adapted access strategies are becoming increasingly important as Asia-Pacific takes on a larger role in global biopharma innovation.

Asia-Pacific is moving from being viewed primarily as a later-stage commercial market to becoming a more important source of drug discovery, investment and scientific collaboration. As a result, pharmaceutical companies are reassessing when and how they plan market entry, structure licensing agreements and build access strategies across a region characterised by very different healthcare systems.

For Menarini Asia-Pacific, that shift has increased the importance of regional commercialisation models that combine central capabilities with local execution. The company’s recent partnership with Pharmacosmos to commercialise Cosela across multiple Asia-Pacific markets is one example of this approach, with a first launch anticipated in Hong Kong in 2028 and other markets to follow.

Glen Godresse, Chief Executive Officer of Menarini Asia-Pacific, discusses why commercialisation decisions are being made earlier, how regional partnerships can reduce complexity across multiple markets, and why regulatory approval alone is not enough to ensure patient access.

Asia-Pacific is increasingly recognised as a major driver of global biopharmaceutical innovation. How has the region's growing importance changed the way companies approach commercialisation and market expansion?

For many innovators, Asia-Pacific has moved from being a later-stage expansion opportunity to a strategic priority from the outset. Our recent partnership with Pharmacosmos to commercialise Cosela® across multiple Asia-Pacific markets reflects that shift. Alongside Europe, Asia-Pacific was identified as a priority region for expansion outside the US, with the first launch anticipated in Hong Kong in 2028 and other markets to follow.

That reflects both the scale of the opportunity and the changing nature of the region itself. Asia-Pacific's healthcare market is expected to reach US$5 trillion by 2030 and contribute around 40% of global healthcare growth. At the same time, high burden of disease, significant treatment gaps, increasingly sophisticated healthcare systems and rapid digital adoption are defining the healthcare landscape and reshaping how patients learn about and gain access to the latest available treatments. The region is also becoming an increasingly important source of innovation, investment and scientific collaboration rather than simply a destination for new medicines.

As a result, commercialisation strategies are becoming far more deliberate. Companies are making decisions much earlier about where to invest, which markets to prioritise, and how to sequence expansion across the region. Increasingly, they're looking for partners who understand Asia-Pacific as a connected region as well as one that truly understands and adapts its go-to-market strategies to the unique and increasingly complex dynamics of each individual market.

Many companies have traditionally pursued country-by-country licensing strategies. What advantages do regional commercialisation partnerships offer, and why are they becoming more attractive in today's environment?

The economics of commercialisation have changed. Bringing innovative therapies to multiple markets independently is increasingly resource-intensive, particularly as regulatory, reimbursement and evidence requirements continue to evolve. Regional partnerships can offer a more efficient route to scale, giving companies access to established capabilities and expertise across multiple markets through a single partner.

That's the philosophy behind our glocal operating model at Menarini Asia-Pacific. We combine regional capabilities across medical, regulatory, market access, digital and commercial functions with empowered local teams who are experts in their local healthcare systems, clinical practice and patient needs. Experience gained in one market can be adapted, refined and applied elsewhere, while local teams retain the flexibility to respond to their own market realities.

Our recent partnership with Pharmacosmos demonstrates this in practice. Following the successful relaunch of an innovative IV iron asset in Australia, we've expanded into Singapore, Malaysia, Hong Kong and New Zealand, applying lessons from one market while adapting them to another. Our experience in Australia showed us that successfully introducing an innovative therapy takes more than the product itself; it requires the right support around it. Dedicated nursing support became an important part of our model, and we built that into our approach in Hong Kong and Malaysia from the outset.

But regional scale should not come at the expense of local relevance. In fact, our portfolio across Asia-Pacific looks very different from market to market because it has been built around the opportunities and needs we see locally. To illustrate: In China, we have built a significant Men’s Health portfolio following the acquisition of a market-leading treatment from Lilly in 2021. In Australia, we strengthened our cardiovascular portfolio through an acquisition from AstraZeneca in 2020, while in Thailand we have built a sizeable aesthetics business around local market needs. Across Southeast Asia, China and India, our portfolio also has a greater weighting towards out-of-pocket medicines, reflecting how healthcare is financed and accessed.

For us, that is glocalisation in practice: using regional scale and experience while assessing each opportunity on its own merits and building around the needs of each market.

Regulatory approval is often viewed as a major milestone, yet commercial success depends on many other factors. What are the most important challenges companies face when translating regulatory approvals into meaningful patient access across Asia-Pacific?

Regulatory approval is a major milestone, but it's only the beginning of a much longer journey. The real challenge is ensuring innovative therapies reach the patients who need them most. That means understanding how physicians make treatment decisions, the various local funding mechanisms, what evidence payers require, and how patients navigate a complex and developing healthcare system where barriers stand in the way of patient access and adoption.

One lesson we've learnt from commercialising more than 200 brands across primary care, consumer health and specialty care is that while experience doesn't give you a formula for success, it does give us the judgement to understand what each therapy needs to succeed in a particular market and how to shape the right commercialisation strategy around those local realities:

Sometimes, that means building the right evidence and demonstrating value. We saw that in Malaysia with an oral anticoagulant therapy that helps prevent stroke and treat serious blood clots. Demonstrating its clinical and economic value

led to its inclusion in the public hospital Blue Book, expanding access to patients who are treated in the public healthcare system (~70% of the population).

It may also be about working with the right stakeholders to build a pathway to access. In New Zealand, we worked with clinicians and a patient group to secure a high-priority recommendation for an IV iron therapy for patients with Hereditary Haemorrhagic Telangiectasia (HHT), which has already led to funding for a subgroup of patients while we continue to work towards broader access.

Other times, it's about understanding and optimising how care is delivered. Introducing Thailand's first child-friendly orodispersible allergy tablet reinforced that parents navigate the healthcare system differently, pharmacists play an important role in treatment decisions, and adapting our approach to local clinical practice and patient needs is just as important as regulatory approval.

Elsewhere, it's about removing the barriers that stand between patients and the medicines they rely on. In 2021, we restored access to a critical therapy for people living with myasthenia gravis by navigating complex regulatory and manufacturing challenges, ensuring patients could continue receiving a medicine they depend on.

I believe that every approval represents a promise to patients. Our responsibility is to keep working until that promise becomes a reality for every patient who needs it.

How are partnerships between global innovators, regional pharmaceutical companies, and local stakeholders evolving to accelerate market access, reimbursement, and adoption of new therapies?

The most successful partnerships today are no longer defined by individual transactions, but by a shared commitment to progress. As bringing innovative therapies to patients becomes more complex, partnerships are becoming more integrated, with global innovators, regional pharmaceutical companies and local stakeholders each contributing distinct but complementary strengths.

For commercialisation partners like Menarini, that evolution has fundamentally changed our role. Global innovators are looking for partners who can help realise the full value of an asset over its lifecycle. That means integrating medical, regulatory, market access and commercial expertise from the outset, then continuing to generate evidence, demonstrate value, strengthen adoption and adapt as healthcare systems and patient needs evolve. Over time, it's that sustained commitment that builds trust and distinguishes a true partner of choice.

The same principle applies to local stakeholders. Accelerating patient education, access and adoption isn't always about changing established behaviours, but understanding them and building on them. Our long-standing collaboration with JD Health in China reflects this approach. By combining Menarini's healthcare expertise with JD Health's digital ecosystem and patient insights, we've been able to meet patients where they already seek trusted healthcare information and products. This year we partnered with JD Health to launch an AI Scar Diagnosis and Treatment Agent which demonstrates how our complementary capabilities can help support patient education and appropriate treatment decisions through channels patients already know and trust.

Ultimately, the organisations that continuously create and demonstrate the greatest value will be those that remain invested in one another throughout the commercial journey. When partners have a common purpose, learn, adapt and grow together, patients are the ones who benefit most.

Looking ahead, what key trends do you expect will shape biopharmaceutical commercialisation across Asia-Pacific over the next five years, and what should companies be doing now to prepare for them?

I believe we're only at the beginning of Asia-Pacific's emergence as a global innovation hub. Today, the region already accounts for 43% of the global innovative pipeline and around one in four global out-licensing deals. China, for example, is becoming a major centre of early-stage drug discovery and clinical development.

As more therapies originate from the region, I expect partnerships to start much earlier in the development phase. Commercialisation models will therefore need to become more flexible, moving beyond the traditional licensing or distribution of market-ready assets to encompass product development, global clinical trials, regional licensing and co-commercialisation. The right model will ultimately depend on the asset, therapeutic area and markets involved.

I also believe true end-to-end commercialisation capability will become a much stronger source of competitive advantage. As scientific innovation accelerates, success will increasingly depend on the ability to navigate highly fragmented

healthcare systems, the evolving Health Technology Assessment (HTA) processes, real word evidence generation and the utilisation of rapidly emerging digital technologies to bring therapies into the hands of patients across diverse markets.

For companies preparing today, my advice would be to think about commercialisation much earlier. The decisions made long before launch often have the greatest impact on what happens after it. At the same time, companies need to stay flexible. There is no single playbook for Asia-Pacific, and the organisations that succeed will be those that know when to apply regional scale and when to adapt to local realities.