

Accelerating Treatments to Patients: Bridging the Valley of Death

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Health Research Alliance Members Meeting
Sponsored by the Alzheimer's Association
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Johnson & Johnson

- Global leader in health care
- More than 250 operating companies in 60 countries
- Selling products in more than 175 countries
- 126,500 employees worldwide



Consumer



Medical Devices

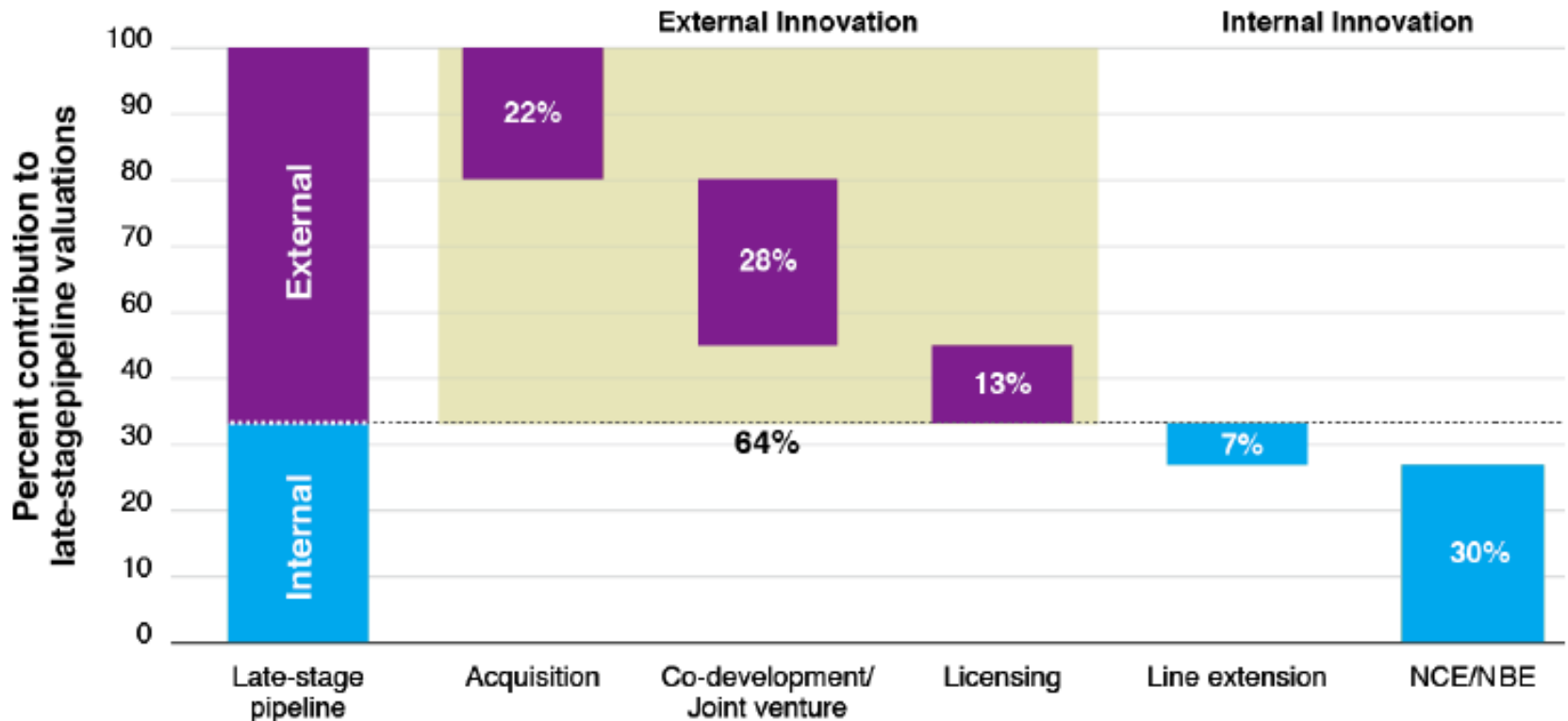


Pharmaceutical



High percentage of pipelines are external

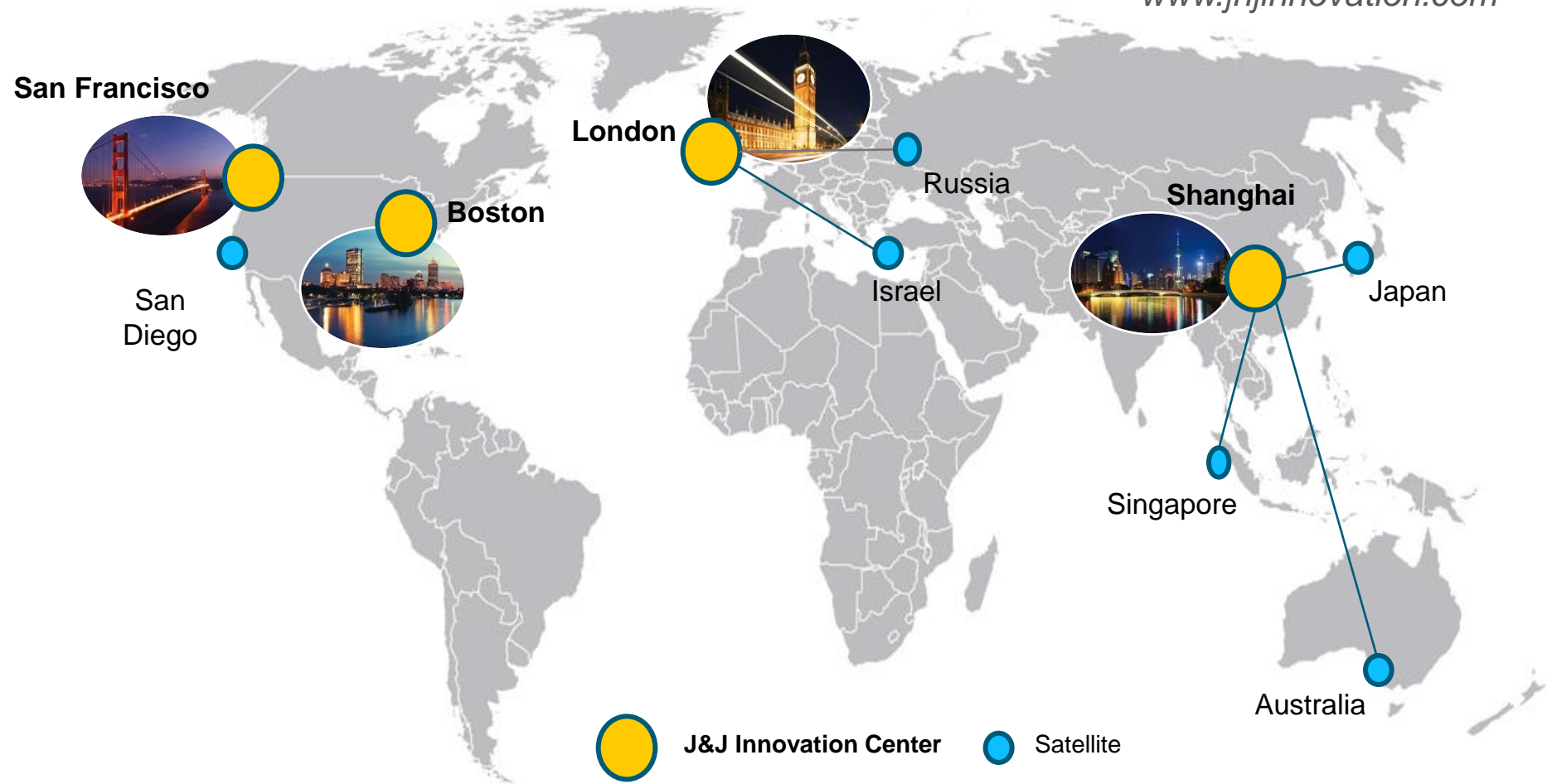
Top 12 Big Pharma's late-stage pipeline valuations by source, 2012-2013



Source: Deloitte Consulting and Thomson Reuters

Johnson & Johnson INNOVATION Our Innovation Centres

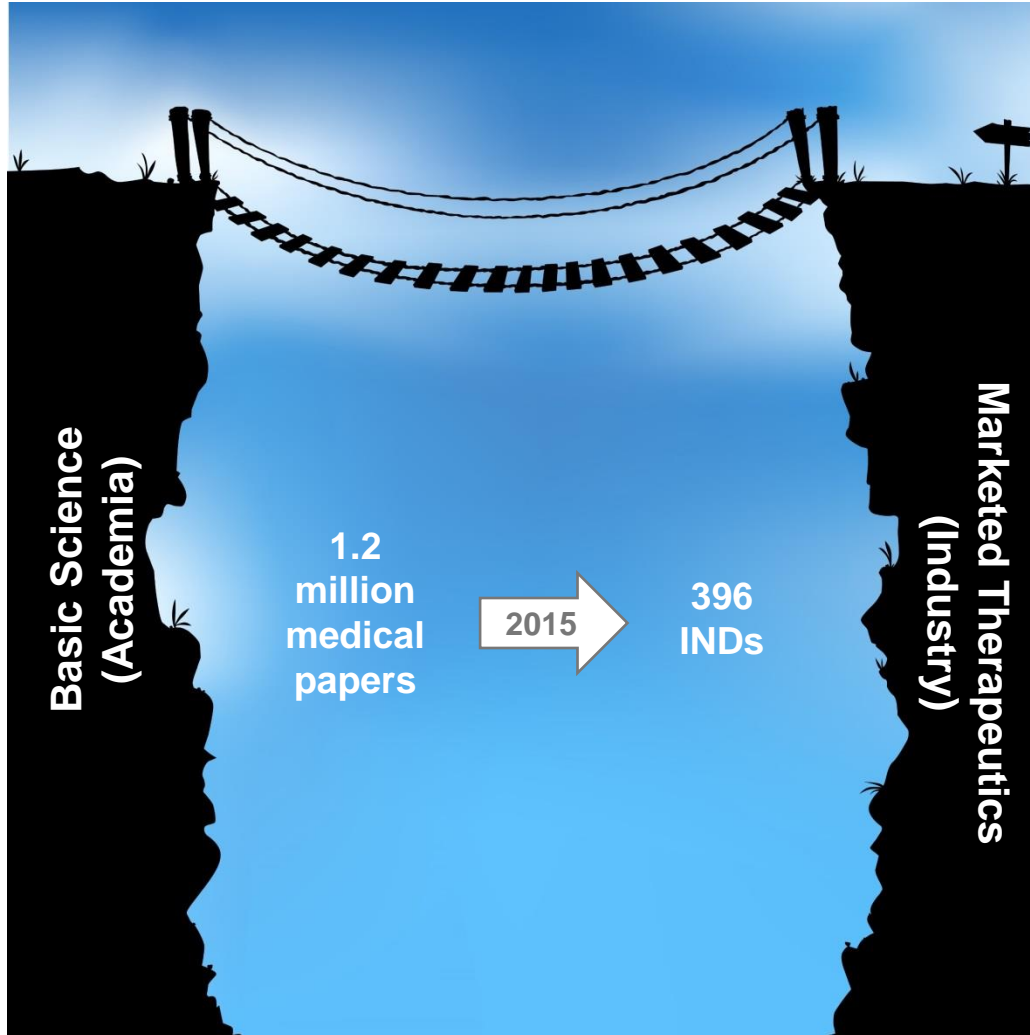
www.jnjinnovation.com



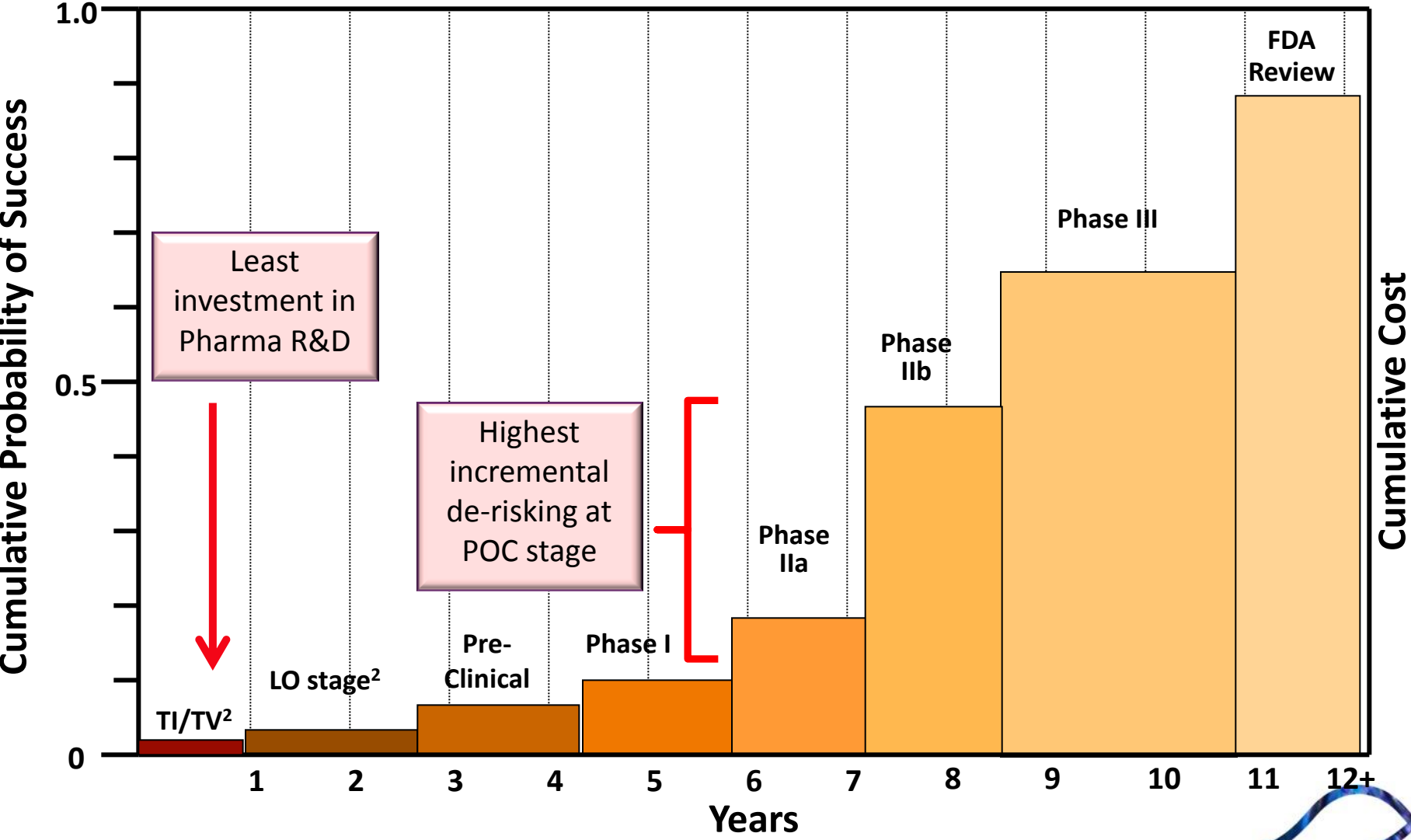
- Janssen Business Development
- Our Corporate VC – J&J Development Corporation
- Our Incubator - JLABS <http://jllabs.jnjinnovation.com/>



“The Valley of Death” aka Lost in Translation



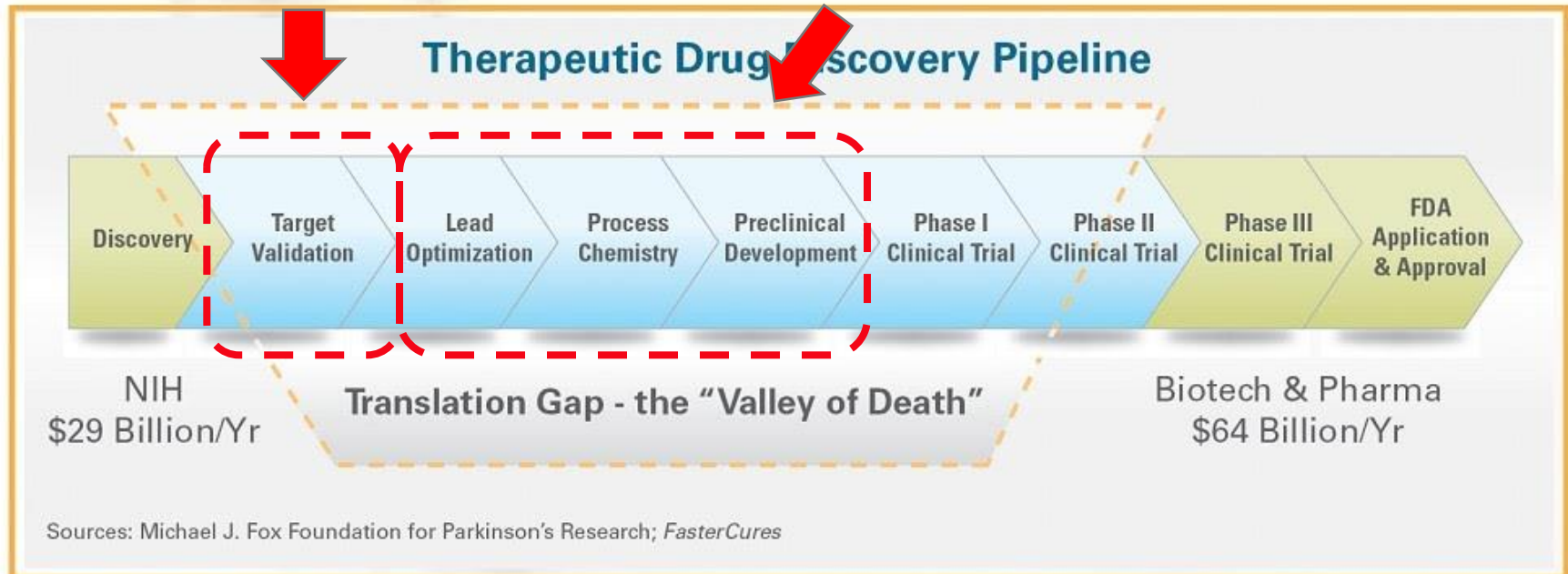
CNS Drug Discovery – Little risk discharge before Phase 2!



Valley of Death from Different Perspectives

The “Pharma” Valley of Death

The “Academia” Valley of Death



Evolving Roles of stakeholders & Novel Partnerships

Venture Philanthropy

Pharma/
Biotech

Precompetitive
partnerships
External innovation
centers

Academic

Drug discovery centers
Tech transfer
collaborating with
industry

Govern-
ment

Interest in
fostering/speeding
translational science
Willing to partner & invest
with Industry

Venture/
financial

Exit via
acquisition/licensing
Collaborative/strategic



Alzheimer's
Drug Discovery
Foundation

alzheimer's
association



AUTISM SPEAKS™
It's time to listen.



THE MICHAEL J. FOX
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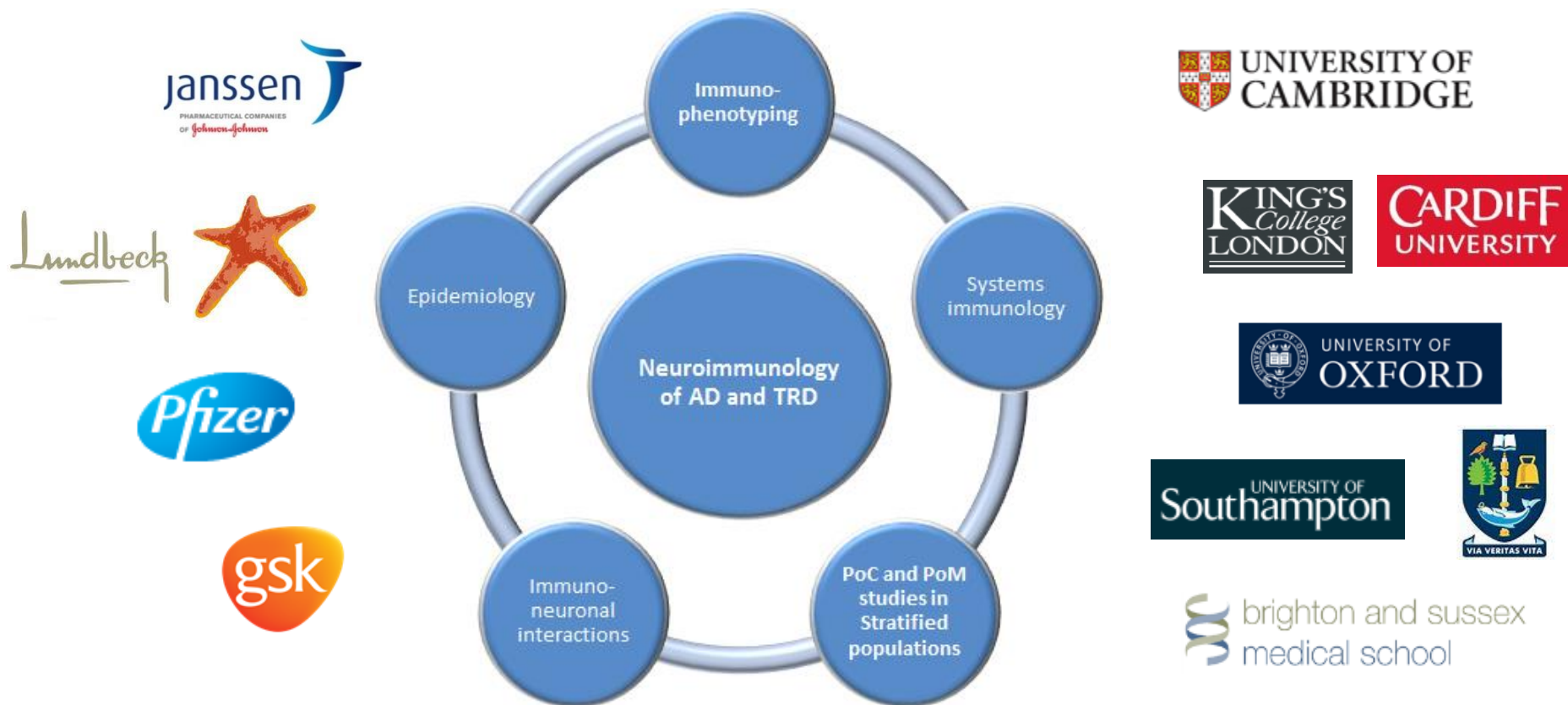
Target ALS



SMA
FOUNDATION

Wellcome Trust consortium for neuroinflammation in Mood and Alzheimer's (NIMA)

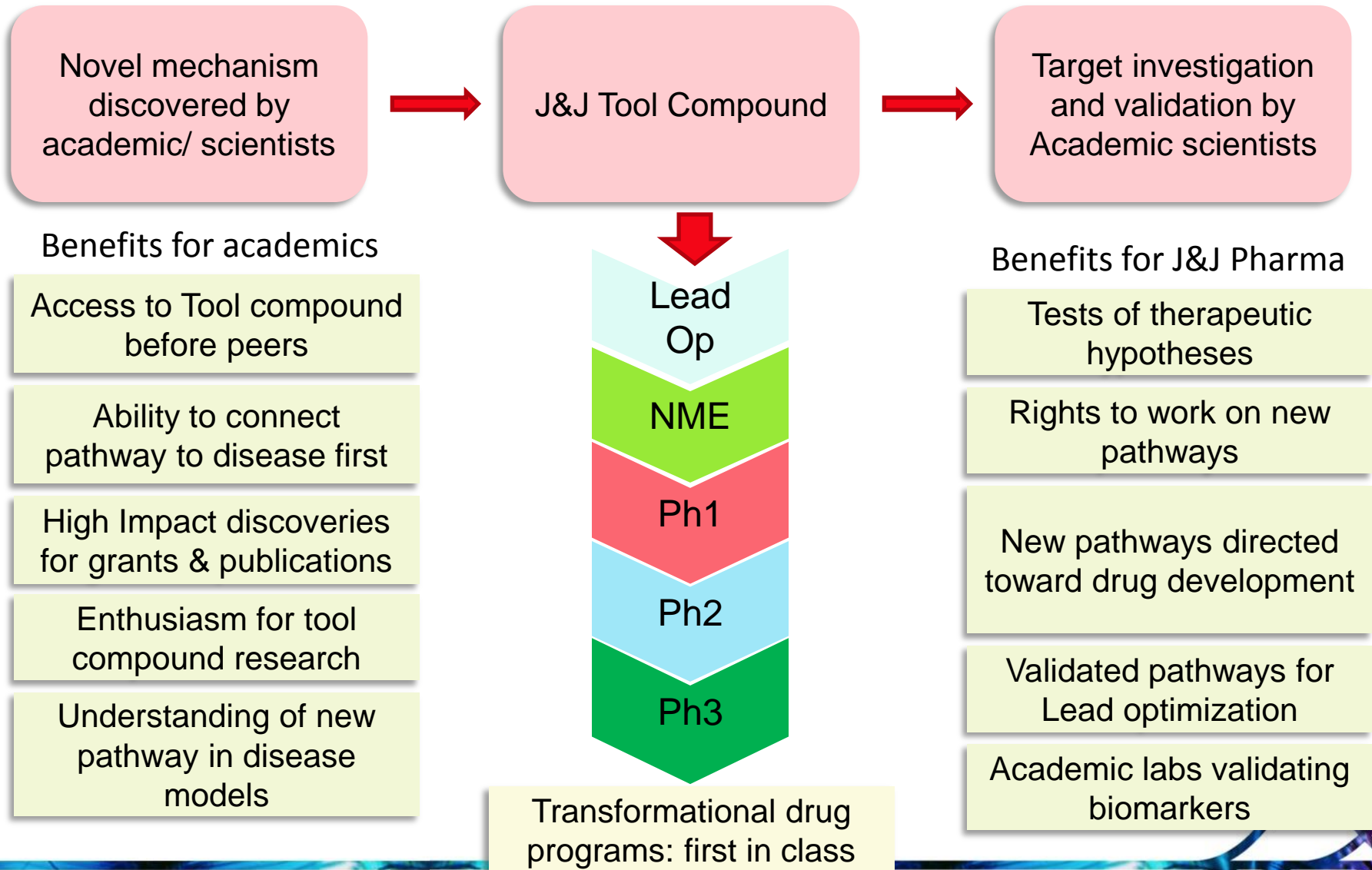
A high unmet medical need calls for an innovative approach



- Engage leading academic and pharma experts to:
 - Understand the role of neuroinflammation in depression and AD
 - Leverage our drug discovery successes against immunological disorders

John Hopkins Brain Sciences Institute

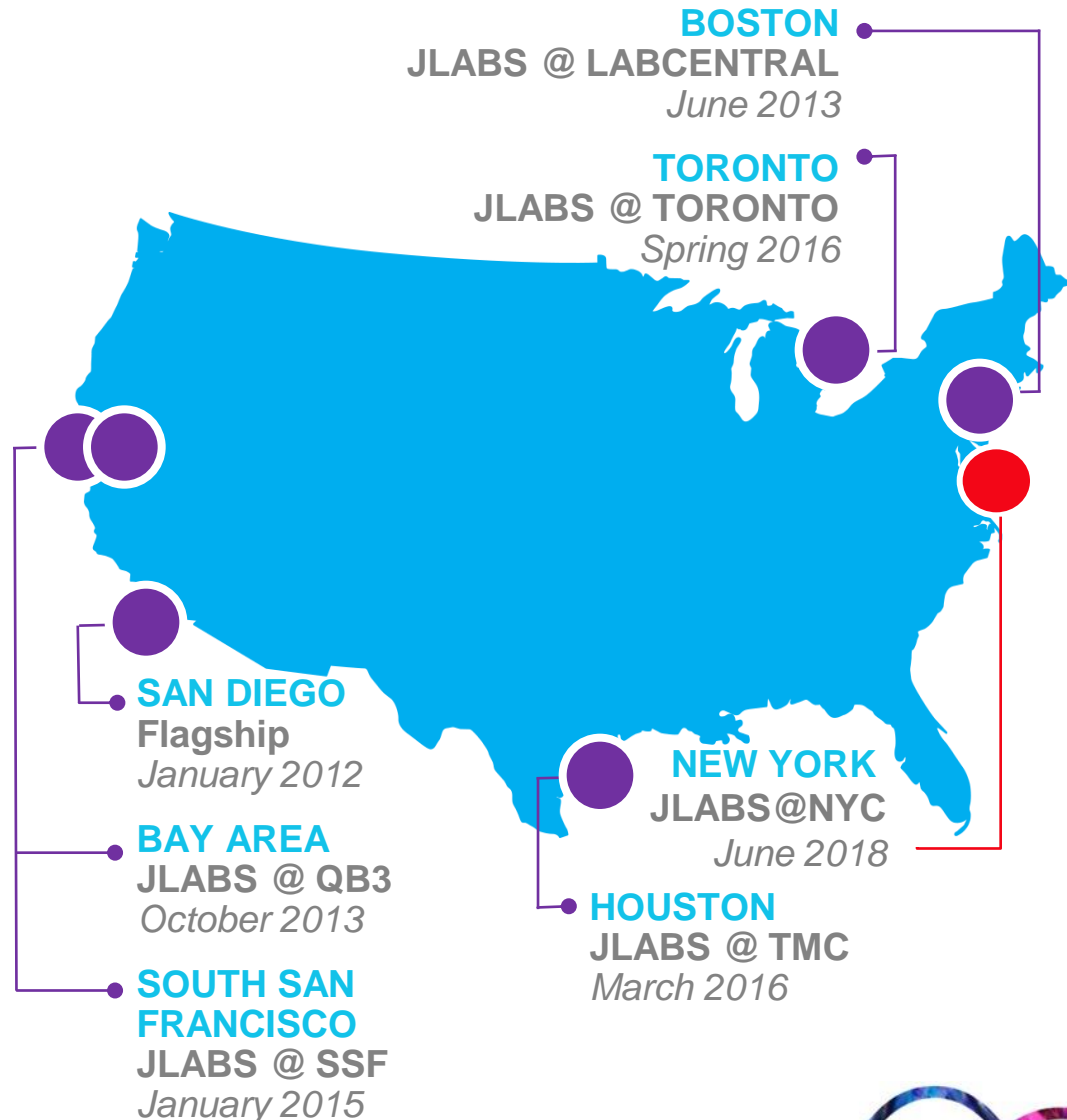
External TI/TV networks fostering early stage drug discovery



JLABS | Company Incubation

- Open innovation model
- Flexible, capital-efficient
- Turn-key lab space
- Community of entrepreneurs
- Access to experts

No strings attached!



Where do we go from here?

- Early Education
 - Integrate training in drug discovery as part of graduate programs, since many students will consider this path
 - Provide mentoring to academic investigators seeking to develop their discoveries (SPARKS, Stanford)
- Continue to foster new models
 - Government sponsored programs (NCATS, CTSC's)
 - Academic drug discovery units (Emory, Harvard, Vanderbilt, etc)
 - Pharma investment in experimental medicine studies
 - More investment by Pharma and VCs in early biotech
- More cross-sector collaboration
 - Public Private Partnerships (focused projects)
 - Better communication across "boundaries"

Sharing expertise and removing siloes is needed to make progress



Thank you

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