

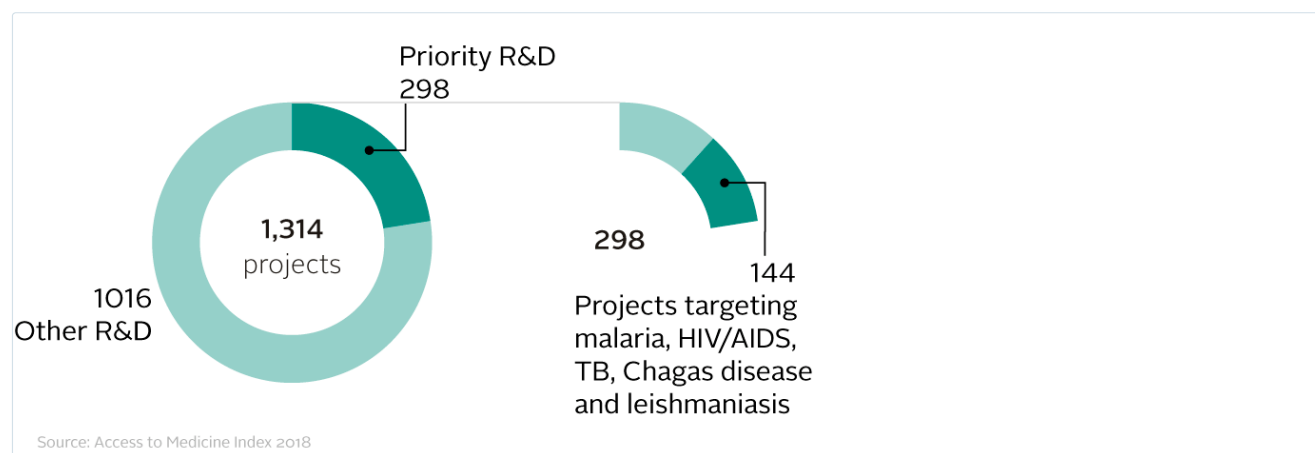
## Key Finding

## Five companies are carrying out 63% of the most urgently needed R&D projects

Most priority R&D projects (63%) are being conducted by five companies: GSK, Johnson & Johnson, Merck KGaA, Novartis and Sanofi. The global health community has identified specific medicines, vaccines, diagnostic tests or other products that are needed as a priority by people living in low- and middle-income countries. The Index terms R&D into these needs as 'priority R&D'. The need for priority R&D has been identified for 45 diseases, conditions and pathogens, with different sets of gaps per disease.

Priority R&D represents one quarter of the total R&D pipeline analysed by the Index (298 out of 1,314 projects). The industry's engagement in priority R&D is overwhelmingly focused on five diseases: 144 of the projects in the priority R&D pipeline target malaria, HIV/AIDS, tuberculosis, Chagas disease and leishmaniasis. These diseases include the leading causes of death in low- and middle-income countries. All five of these diseases have global health donors or product development partnerships behind them. Overall, almost two-thirds of priority R&D projects are being developed in collaboration with other organisations.

Figure: Priority R&D represents almost one quarter of the total R&D pipeline



The chart compares the pipelines of priority R&D projects for each of the 20 companies evaluated. The top five companies account for almost 63% of these.

### Many priority product gaps go unaddressed

A total of 91 of the 139 identified gaps are unaddressed, and 16 prioritised diseases have no projects at all. The average number of projects across the 45 diseases is only two. Diseases with the least attention here include several haemorrhagic fevers, several parasitic worm diseases, syphilis, Buruli ulcer, cholera and diarrhoea caused by *E. coli*. Some of these are rarer diseases, while others have weaker global health community push and donor support.

For malaria, there is at least one project for each gap identified. For both tuberculosis and HIV/AIDS, there is one gap left unaddressed by the 20 companies. Coverage of product gaps for leishmaniasis and Chagas disease is more patchy, with four out of nine product gaps being addressed.

Specific product gaps have not been established to address antibiotic resistance. The industry has 40 such projects in the

