

MARKET UPDATE

Commercial Market Update and Salary Guide



INDUSTRY
INSIGHTS

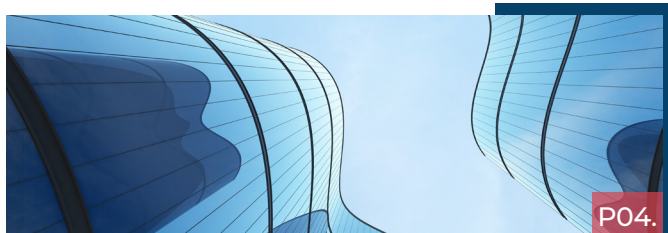
Key trends and compensation
movements affecting sales,
marketing, and operations
talent in life sciences.

Global
Report



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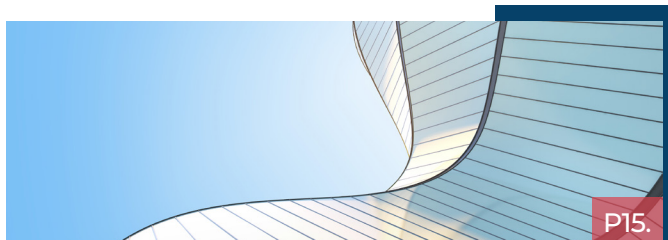
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Commercial Trends in the USA



Commercial Trends in Europe



Commercial Trends in APAC





Introduction

The global life sciences industry has proven itself to be highly resilient in the face of uncertain economies and changing priorities. Markets are thriving thanks to a combination of factors including the pressing need to treat aging populations, exciting advancements in science and technology, and access to substantial investment and funding.

These trends are driving innovation, accelerating drug development, and improving patient outcomes worldwide, but without commercially successful products and sustainable revenue streams, the industry cannot continue to fund new research. This will ultimately hinder the development of future life-saving drugs, devices, and therapeutic applications.

Commercial professionals are the determining factor behind a product's success, responsible for generating revenue through the sale of pharmaceuticals, medical devices, biotechnology products, and healthcare services. The demand for sales, marketing, and operations talent is heavily based on the industry research and investment that has taken place in previous years, so by analyzing developments today, we can predict the trends and needs of tomorrow.

This report explores some of the biggest life sciences trends around the globe, and how they are shaping hiring and compensation for professionals across commercial functions. Salary and bonus benchmarking is also included for key commercial roles in the USA, Europe, and APAC, along with key takeaways for both hiring managers and professionals.

So, whether you are looking to understand how to attract top commercial talent or searching for information about the emerging career opportunities in the life sciences industry, this report contains the guidance you need to help you make informed decisions and reach your goals.





Commercial Trends in the USA

National health expenditure is projected to account for around 20% of the USA's economy by 2031¹, emphasizing the endless opportunities for commercial talent to work on existing and emerging drugs, therapies, and devices. But over the last year we have seen the spotlight shift away from life-threatening diseases, and over to common health issues on the other end of the spectrum.



Commercial Trends in the USA

From rare to everywhere – the boom in mass market healthcare

Huge leaps and bounds in the treatment of rare conditions, hereditary diseases, and oncology have been made over the last decade, improving peoples' quality of life and their ability to survive. And while rarer diseases are still a key focus for research and development in the USA's life sciences industry, there has been an explosion of mass market drugs and solutions targeting healthcare problems affecting larger percentages of the population. It has been impossible to miss the rise of Ozempic for weight loss, for example.

Environmental factors have also caused rises in conditions like dry eye disease from working with screens all day, or asthma from living in a city with poor air pollution. And as statistically people are more likely to be affected by these health issues than rarer conditions, these lucrative markets are rapidly hiring, all on the hunt for the best sales and marketing talent to sell their solutions as they grow.

Product pipelines and expiring patents

As drug patents expire, it's critical that companies invest in new novel assets to future-proof their product pipeline and profits. However, it is becoming increasingly rare for pharmaceutical companies to manage products from the petri dish right through to launch. It is much easier for medium to large sized firms to buy a finished product, or outsource for specialist expertise throughout the product lifecycle where necessary.

Several key patents are due to expire within the next few years. Led by the urgency to buy new drugs, global life sciences M&A spend reached US\$191b in 2023, up 34% from 2022, with activity set to rise even further in 2024². These expiring patents also open up opportunities for middle market companies to launch biosimilar drugs.





Hotspots

Now that companies are pivoting away from remote working and purely focusing on digital marketing strategies as necessitated by the pandemic, sales representatives are needed at all times in all corners of the USA.

The biggest hotspots for life sciences can be found on the East and West Coast, which have battled to become the country's biggest life sciences hub over the last decade.



Boston currently holds the crown for commercial professionals. Kendall Square is known as “the most innovative square mile on the planet”, as the area is densely populated with biotech startups, pharmaceutical companies, venture capital firms, and research organizations. Nearby New Jersey has the largest concentration of scientists per square mile than anywhere else in the country, and is home to 14 of the world's top 20 pharma companies³. The sheer number and variety of organizations in the area means there are no shortage of jobs to choose from, plus the cost of living is lower than other life sciences hubs in the USA.

On the other side of the country, the San Francisco Bay Area is the West Coast's largest hub and the biggest biotech cluster in the world. The industry has thrived when other local markets have struggled, thanks to its strong workforce and easy access to research institutions and investors.

Other steadily growing hotspots include North Carolina with its Research Triangle Park (RTP) cluster, and Texas, where over 100,000 people work in around 7,500 biotech businesses⁴.



Compensation Insights

There might be an influx of great talent on the market at the moment following restructuring and changing priorities post-pandemic, but companies are still paying a premium for people who have the specific expertise they need.

Salaries are rapidly increasing for professionals with proven success with product launches and more senior positions, as **Kristiaan Rawlings, Director – Commercial Life Sciences at EPM Scientific Dallas**, details:

“Commercial operation areas are becoming more important than ever for launches, to the point where new roles such as Chief Access Officer are emerging that never existed before. Where similar drugs are being launched at the same time, companies are realizing that their differentiator is the excellence of their operations team, so are competing for the best talent. We are seeing base salaries increase by around 25k for some VP and director level roles.”

Bonuses are not seeing the same increases as base salaries, notes **Oliver Watson, Vice President – Commercial Operations at EPM Scientific New York**, but there are bigger shifts happening for remote and flexible working. Fully remote positions are few and far between now as companies want their teams back in the office, building connections, and collaborating in person.





Salary Guidance

PHARMACEUTICALS					USD
Discipline	Senior Manager	Associate Director	Director	Senior Director	Vice President
Commercial Operations	\$150k - \$175k	\$170k - \$220k	\$200k - \$235k	\$250k - \$270k	\$290k - 365k
Marketing	\$160k - \$180k	\$175k - \$210k	\$200k - \$250k	\$250k - \$300k	\$300k - \$350k
Corporate Strategy	\$160k - \$180k	\$170k - \$190k	\$200k - \$240k	\$240k - \$280k	\$300k - \$330k
Market Access	\$175k - \$200k	\$185k - \$215k	\$200k - \$240k	\$260k - \$300k	\$290k - \$390k
Bonus & LTI / RSUs	Bonus: 15% + LTI / RSUs: \$0 - \$30k	Bonus: 20% + LTI / RSUs: \$0 - \$65k	Bonus: 25% + LTI / RSUs: \$25k - \$120k	Bonus: 25% + LTI / RSUs: \$50k - \$250k	35% + LTI / RSUs: \$150k - \$300k

For bespoke benchmarking, please contact EPM Scientific.





Commercial Trends in Europe

The European life sciences industry demonstrated its strength and adaptability during 2023's turbulent economy, and it is projected to reach a value of over \$267 billion by the end of 2027⁵. While there are new regulations for life sciences organizations to contend with, as the industry shifts away from declining areas like PCR tests to promising new medical breakthroughs and treatments, a new host of opportunities have opened up for commercial professionals to promote life-changing drugs, therapies, and devices.





Commercial Trends in Europe

Revolutionizing cancer diagnostics and care

Cancer is the second most common cause of death in Europe⁶, and biomarkers in oncology treatment have been a major research focus, particularly as a means of enhancing personalized medicine approaches, identifying patients who are likely to benefit from specific therapies, and in monitoring treatment response. AI is also helping to speed up processes in this field, like analyzing patient data and discovering new novel biomarkers.

The integration of biomarkers into oncology treatment strategies has the potential to revolutionize cancer care by enabling more precise diagnosis, prognosis, and treatment selection, making it an attractive field with longevity for sales and marketing professionals with the right expertise.

Disruptive startups and technologies shaping hiring

The future of the medical industry is also being shaped by genomics. Metagenomic, genome sequencing, and functional genomics are all hot areas of research that are advancing our knowledge of genetics, disease mechanisms, and personalized medicine. There are a number of smaller startup companies founded in Europe and the USA that focus on genetic analysis tools making waves in the European market.

This exemplifies a bigger trend taking place where smaller and more agile companies are seeing success with disruptive technologies, and get to take their pick of professionals who want to explore working in exciting new avenues that have long-term career opportunities. Meanwhile, larger companies that mass hired during COVID and solely relied on products like reagent kits are now struggling to move with the times as quickly. These startup companies building out their teams tend to have more exacting talent requirements as they need people with the right skills and experience who can facilitate their growth.

The innovations transforming the medical device landscape

Much like other fields within life sciences, while vital but everyday medical devices such as catheters, stents, and hip implants still need to be produced and sold, the medical device world is also turning its focus to new innovative products. Breakthroughs are being made in neuromodulation for brain disorders, research and development continues into orthopedic robotics and exoskeletons, and advancements in cardiology are being made with structural heart and cardiac mapping.

While the need for commercial medical device talent is slightly lower than it has been in recent years, demand will soar as these trailblazing products come onto the market, and professionals with knowledge of these emerging fields will be best positioned for a long and rewarding career.





Hotspots

Both businesses and professionals are spoilt for choice when choosing where to set up, expand, or work in Europe, as it is home to some of the most innovative life sciences hubs in the world. France, the UK, Switzerland, and the Benelux and Nordics regions are all well-established, attractive markets.

The DACH region has also long been a life sciences leader in Europe but Germany, and Munich in particular is going from strength to strength. It is home to over 450 life sciences businesses along with many research institutions and universities with leading life sciences programs, which work closely with local companies to drive innovation.



Italy is also rapidly expanding its biotech industry, with Milan as its main hub. The country has seen steady growth in the number of biotech firms and bounced back quickly in terms of turnover growth following the peak of the pandemic. With the main focus of research being healthcare and drug research, there are an ever-increasing number of opportunities available for sales and marketing professionals.





Compensation Insights

While the compensation tables below represent averages for the whole of Europe, it's important to note that base salaries vary significantly between countries. For example, roles based in Switzerland typically receive larger salaries compared to their counterparts in the UK.

Freddie Eaden, Associate Vice President - Commercial Medical Device at EPM Scientific London, explains why salaries can also vary depending on the type of product commercial professionals are selling:

“There is more demand for talent for newer or more technical products that have a bigger impact on patients' lives, and therefore companies often pay more for proven experience. On the other hand, if a company is selling devices like stents or orthopedic screws, they are not generally seeking the same caliber of talent and offer lower salaries.”

Beyond compensation, stability is top of the wish list for professionals when considering career opportunities, adds **Thiviya Suntharesan, Vice President – Commercial at EPM Scientific London:**

“Even though there are an array of opportunities for commercial professionals to work on groundbreaking projects and launches, with the uncertain economy at the moment, professionals are more likely to be looking at staying with their current company or choosing the safer, more stable option when considering their next employer.”





Salary Guidance

MEDICAL DEVICES - SALES		EUR
Role	Compensation	
Clinical Specialist	€70k - €90k base salary with team bonus	
Sales Representative	€70k - €90k base salary with 25% - 30% bonus	
Key Account Manager	€80k - €100k base salary with 25% - 30% bonus	
Regional Sales Manager	€110k - €130k base salary with 25% - 30% bonus	
Country Manager	€150k - €170k base salary with 25% - 30% bonus	
Sales Director	€180k - €220k base salary with 25% - 30% bonus	

MEDICAL DEVICES - MARKETING		EUR
Role	Compensation	
Junior Product Manager	€55k - €70k + bonus	
Product Manager	€70k - €90k + bonus	
Marketing Manager	€90k - €100k Base + bonus	
Marketing Director	€150k - €170k base salary with 25% - 30% bonus	

For bespoke benchmarking, please contact EPM Scientific.





Salary Guidance

LIFE SCIENCES RESEARCH AND DIAGNOSTIC - SALES		EUR
Role	Compensation	
Application Specialist	€50k - €60k base salary with team bonus	
Sales Specialist	€650k - €90k base salary with bonus up to 30%	
Business Development Manager	€60k - €80k base salary with bonus up to 30%	
Account Manager	€70k - €80k base salary with bonus up to 30%	
Key Account Manager	€80k - €100k base salary with bonus up to 30%	
Sales Director	€120k - €200k base salary with bonus up to 30% + RSUs / LTIs	

LIFE SCIENCES RESEARCH AND DIAGNOSTIC - MARKETING		EUR
Role	Compensation	
Junior Product Manager	€55k - €70k + bonus	
Product Manager	€70k - €90k + bonus	
Marketing Manager	€65k - €80k base + bonus	
Marketing Director - Europe	€150k - €170k base salary with 25% - 30% bonus	

For bespoke benchmarking, please contact EPM Scientific.





Commercial Trends in APAC

Home to around 60% of the world's population and with rapidly aging societies, APAC's pharma, medical device, and healthcare markets are the fastest growing in the world right now⁷.

This growth, combined with the digital transformation taking place in the life sciences industry, has led to a boom in areas like digital health, telemedicine, and health informatics, and has changed the way companies work both internally facing and externally. While biotech and pharma spaces have seen particularly large growth in APAC, these innovations are heavily impacting hiring trends for commercial professionals within all areas of the region's life sciences landscape.



Commercial Trends in APAC

The digital revolution and demand for specialized skills

Now that many companies are focusing on digitalization and have apps and digital products, there has been a huge increase in demand for specialized skills and knowledge over the last 12 months in areas like data analytics, niche areas within regulatory affairs, and bioinformatics.

Cell and gene therapies, personalized medicine, generative AI, and precision healthcare are all hot topics among life sciences companies in APAC as they look to make positive changes to healthcare and better treat their aging populations, opening up new opportunities for commercial professionals with experience in these areas or transferrable skills.

Navigating new supply chains amid senior talent shortages

Life sciences organizations in APAC have continually been investing highly in quality assurance, engineering, and manufacturing capabilities since the pandemic, as the region aims to strengthen its supply chains to rely less on imports from other parts of the world. This has resulted in an overwhelming need for middle level executive roles up to the c-suite as companies look to take advantage of marketing their own products and digital innovations, seeking expertise in market access and getting their products out to the people.

But the more experience needed, the harder the right professionals are to come by, and there are huge talent shortages in APAC. Candidates are often in multiple hiring processes and are constantly being approached by other businesses. This poses not only the challenge of attracting new talent in, but retaining current high performing employees so they avoid the temptation to move to a competitor. **Rachael Smith, Senior Vice President – Client Director at EPM Scientific APAC**, explains how she helps companies to develop this two-fold strategy:

“Beyond sourcing top caliber candidates and saving companies time and money, we offer strategic account management at EPM Scientific, consulting on areas including employer branding and competitor analysis. This can help companies to understand their attrition rate, why employees are leaving and where they are moving to, and how they can be more competitive against other local firms.”





Hotspots

Singapore has long been known for innovations in healthcare, and investment continues to pour into Biopolis, its dedicated to biomedical research and development campus. While major successes have been few and far between since it was established 20 years ago, local companies are now in a great place to capitalize on new medical and technological breakthroughs, and the area will continue to be an international hotspot.



Tokyo has a diverse life sciences ecosystem, with plenty of medical device, pharmaceutical, and biotech businesses headquartered there, along with leading scientific research universities and institutions. Recent changes to regulations in Japan have made it easier to launch new products there, so international investment is rapidly increasing, and demand for talent along with it.

Demand for commercial professionals is also growing in Southeast Asia, particularly in Thailand, Indonesia, Malaysia, and the Philippines. Many people speak fluent English and they command lower salaries compared to APAC's main life sciences hubs, making them desirable for remote or travel-focused positions. Other emerging growth spots are South Korea and Australia which both have investment-friendly policies, and as such are seeing increasing numbers of both startups and larger businesses hiring senior talent in preparation for expansion.



Compensation Insights

The cost of living in APAC's key life sciences hubs are high, and combined with a shortage of talent in the industry, salaries are incredibly competitive. Highly qualified professionals with specialized skills command the biggest salaries.

However, in a market that was affected by downsizing after the worst of the pandemic was over, commercial candidates are also looking for stability, security, and career advancement – all things that companies should highlight throughout their hiring process if they want to be seen as attractive.

Being more diverse than anywhere else on the planet, main career motivations and compensation expectations vary throughout APAC, and hiring managers should consider this when optimizing their compensation and benefits packages.

For example, professionals in some cities tend to focus more on higher salaries and better job titles, whereas others place a larger importance on work-life balance and have candidates expecting flexible working as standard.

Shermain See, Principle Consultant at EPM Scientific Singapore, unveils some of the benefits most desired by candidates in APAC:

“Candidates very much expect extra benefits on top of their base salary and bonus. Although there is a push for people to be in the office more, lots of companies still offer some kind of flexible working model. It's often on top of the list of candidates' ideal compensation package, and it definitely makes offers more compelling. For company cars we are also seeing a preference for fixed car allowances rather than on a reimbursement basis, as people prefer receiving fixed money every month.”





Salary Guidance

Singapore

LIFE SCIENCES - SALES		SGD
Role	Base Salary	Additional Compensation
Sales Representative	SGD 60k - SGD 80k	Sales Commission
Sales Manager	SGD 95k - SGD 180k	Sales Commission
Sales Director	SGD 180k - SGD 220k	Sales Commission
Vice President of Sales	SGD 200k - SGD 280k	Sales Commission

LIFE SCIENCES - BUSINESS DEVELOPMENT		SGD
Role	Base Salary	Additional Compensation
Business Development Manager	SGD 84k - SGD 120k	Bonus
Business Development Director	SGD 120k - SGD 180k	Bonus
VP Business Development	SGD 180k - SGD 250k	Bonus

LIFE SCIENCES - MARKETING		SGD
Role	Base Salary	Additional Compensation
Marketing Manager	SGD 96k - SGD 150k	Bonus
Marketing Director	SGD 145k - SGD 200k	Bonus

For bespoke benchmarking, please contact EPM Scientific.



Salary Guidance

Singapore

MEDICAL DEVICE SALES		SGD
Role	Base Salary	Additional Compensation
Clinical Specialist	SGD 55k - SGD 84k	Bonus
Sales Representative	SGD 36k - SGD 68k	Sales Commission
Key Account Manager	SGD 72k - SGD 96k	Bonus
Business Development Manager	SGD 84k - SGD 120k	Bonus
Regional Sales Manager	SGD 96k - SGD 156k	Sales Commission
Country Manager	SGD 156k - SGD 220k	Bonus
Sales Director	SGD 135k - SGD 240k	Sales Commission / Bonus

MEDICAL DEVICE MARKETING		SGD
Role	Base Salary	Additional Compensation
Product Manager	SGD 80k - SGD 120k	Bonus
Marketing Manager	SGD 96k - SGD 150k	Bonus
Marketing Director	SGD 145k - SGD 200k	Bonus

LIFE SCIENCES RESEARCH & DIAGNOSTIC - SALES		SGD
Role	Base Salary	Additional Compensation
Sales Specialist	SGD 60k - SGD 80k	Sales Commission
Business Development Manager	SGD 84k - SGD 100k	Bonus
Account Manager	SGD 60k - SGD 90k	Bonus
Key Account Manager	SGD 70k - SGD 100k	Bonus
Sales Director	SGD 135k - SGD 240k	Sales Commission / Bonus

LIFE SCIENCES RESEARCH & DIAGNOSTIC - MARKETING		SGD
Role	Base Salary	Additional Compensation
Product Manager	SGD 80k - SGD 120k	Bonus
Marketing Manager	SGD 96k - SGD 150k	Bonus
Marketing Director	SGD 145k - SGD 200k	Bonus

For bespoke benchmarking, please contact EPM Scientific.



Salary Guidance

Hong Kong

LIFE SCIENCES - MARKETING		HKD
Role	Base Salary	

Marketing Director	HKD 800k - HKD 1.2M
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MEDICAL DEVICE SALES		HKD
Role	Base Salary	Additional Compensation

Clinical Specialist	HKD 390k - HKD 650k	Bonus
Sales Representative	HKD 390k - HKD 650k	Commission
Key Account Manager	HKD 450k - HKD 660k	Bonus
Sales Director	HKD 800k - HKD 1.2M	Bonus / Commission

MEDICAL DEVICE MARKETING		HKD
Role	Base Salary	Additional Compensation

Product Manager	HKD 400k - HKD 1M	HKD 200k - HKD 500k Bonus
Marketing Manager	HKD 550k - HKD 800k	Bonus

For bespoke benchmarking, please contact EPM Scientific.



Key Takeaways

In addition to the guidance provided throughout this report, here are our key takeaways for hiring managers to consider when looking to expand their commercial team, and for sales, marketing, and operations professionals exploring their career options in the ever-evolving life sciences landscape.





Key Takeaways for Hiring

01 UNDERSTAND YOUR REQUIREMENTS

With hiring managers looking for the cream of the crop, it is crucial to have a clear idea of the non-negotiable skills and experience you need, and aspects where you can be more flexible if necessary. Having this understanding and being clear with expectations at the start of the interview process, including your approved compensation range and estimated start date, ensures that both parties can be transparent with each other.

02 CONSIDER YOUR COMPENSATION PACKAGE

Salaries of course have to be competitive, but if you are struggling to attract top talent, you should examine your wider compensation package and the benefits that are expected as standard by professionals in your area. Depending on your office location you may need to be more flexible with your remote working policy, for example, or you may have a local competitor that offers a more attractive range of benefits.

03 DON'T DELAY DECISION-MAKING

At a time where candidates are usually in multiple processes and the most in-demand professionals have the luxury of choosing between several offers, companies have to be fast and keep their candidates engaged. Make your interview process as streamlined as possible, sell your company, and give your final offers promptly and physically, as this will reduce the risk of competing or counter offers.





Key Takeaways for Professionals

01 LOOK TO THE FUTURE

As the life sciences industry continues its digital transformation, think about which emerging technologies and therapies interest you, as well as which career moves will put you on a strong trajectory. Which positions can offer you the opportunity to learn and grow your skills, and would you rather take on a role at a disruptive startup where you could be one of the first to work in a new field, or sell more established products for a larger and potentially more stable organization?

02 BE CLEAR ON EXPECTATIONS

As important as long-term career goals are, they must also be balanced with salary and compensation expectations. Just as we recommend to hiring managers, have a clear understanding of what you ideally require in a new position, whether that is a starting salary, clear progression opportunities, a travel allowance, or flexible working. Being upfront on your non-negotiables can save both you and a potential employer time on lengthy processes if you cannot come to an agreement.

03 BUT ALSO BE REALISTIC

Salaries in the life sciences industry might be strong and other aspects of compensation competitive, but it is important to remember there are also many other skilled professionals competing for the same roles. Back up your experience with quantifiable achievements, demonstrate your interest and passion, and be prepared to compromise if you are offered a role that ticks most of your boxes.





Summary

Hiring the right sales and marketing talent is absolutely critical for the success and profitability of a new drug, device, or therapeutic application; and if products don't sell, money can't be invested into new life-changing medical technologies and breakthroughs.

Competition for professionals with proven expertise and successful launches under their belt is fierce, and the current market is candidate driven. While larger companies offer a strong and established array of projects to work on, smaller startups provide incredible opportunities to work with cutting edge technologies and areas of research. Understanding the latest salary movements, compensation and career motivations, and how to best sell themselves is essential if organizations want to attract, secure, and retain the best talent.

EPM Scientific helps companies innovate their commercial operations and build top performing teams to launch best in class drugs, while supporting sales and marketing professionals throughout their career by connecting them with industry-leading opportunities.

If you would like further information or advice following this report, please get in touch. Whether you need support attracting candidates from this in-demand talent pool, or are a professional looking for your next career-defining position, EPM Scientific is committed to helping you achieve your goals.





About EPM Scientific

In the face of disruption, innovation and competition, life sciences companies and their leaders must find specialist talent faster than ever before.

Demand for top life sciences talent has accelerated since the pandemic, and the continued emergence of startups and greater interest in drug development is also unrelenting, meaning having a leading talent partner to connect employers to the very best people in the industry is crucial for its sustained growth.

We support the world's largest life sciences institutions by connecting them with in-demand professionals to take the next leading drug, device or therapeutic application from conception, into Research & Development, and Clinical, all the way through to Sales & Marketing.

OUR SPECIALISMS

- Biometrics
- Clinical Development
- Clinical Operations
- Commercial
- Medical Affairs & HEOR
- Medical Communications
- Pharmacology
- Pharmacovigilance
- Quality
- Regulatory
- R&D



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