DKSH Healthcare's Commercial Go-To-Market Trends Series

Unlocking the Value of Commercial Outsourcing, Now and Into the Future

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Delivering Growth – in Asia and Beyond.

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Welcome once again to the DKSH Healthcare's Commercial Go-to-Market Trends Series, in which we share insights and findings from regional executives about growth strategies for the pharmaceutical and life sciences industry in Asia Pacific (APAC), with special focus on markets in Southeast Asia, North Asia, and Australia/New Zealand. In the first two articles, we looked at how the evolving healthcare environment is demanding a rethink of traditional commercial models in the region - with pressured commercialization timelines, rising complexity, and increasing cost challenges (especially with new launches and in bigger priority markets in North America and Europe demanding more focus and resources). We also took a deep dive into the design of modern Commercial Outsourcing (CO) models as a recommended solution to maximize growth opportunities in APAC – including selecting the right partners and successfully managing alliance management.

Now, in this third and final article of the series, we explore the future of CO – how companies can move from transactional outsourcing toward strategic partnerships, building CO arrangements that are agile, resilient, and ready for tomorrow's healthcare landscape. Establishing CO effective partnerships from the get-go will help to ensure the desired return on the investments can be realized in the short term and secured for the long term.

> The demand for demonstrable value and RoI will only intensify. This means that both MNCs and their partners must become masters of efficiency. For alliance partners, this translates to leveraging their scale, regional infrastructure, and technology stack to provide tangible benefits that go beyond a simple fee-for-service model. The partnership of the future is one of shared risk, shared investment, and shared reward, driven by a mutual commitment to innovation and growth
>
> — Chris Willmott, Head of Foundational Products APAC & LMIC (Roche)

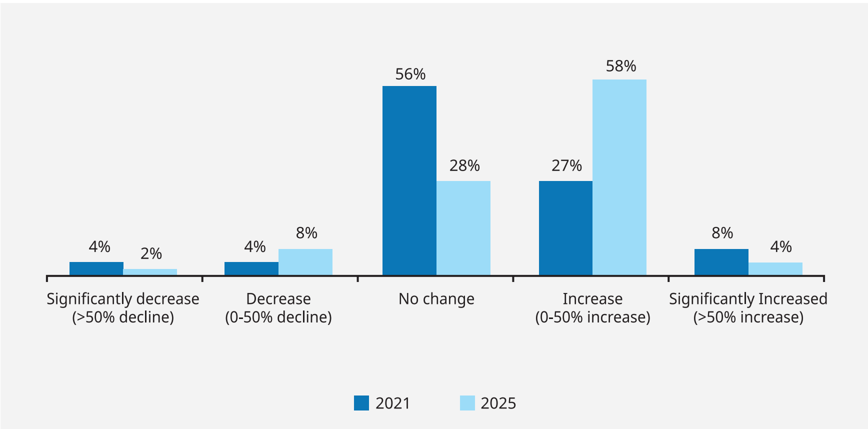
From vendor to value partner – shifting the CO mindset

There is no doubt that the shift in mindset towards CO for healthcare markets in APAC is already underway – In our survey, 90% of executives are outsourcing at least a portion of their portfolio to a CO partner. The nature of the relationship is also changing – more than half of respondents see these CO partners as strategic healthcare business advisors offering end-to-end services, rather than simpley logistics and distribution vendors.

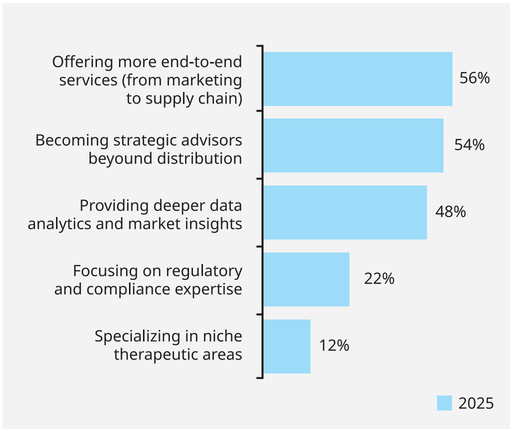
Our survey also finds the rate of CO adoption for healthcare is rising in the region. As Figure 1 demonstrates, 62% of survey respondents have increased the portion of their outsourced portfolio in the last three years, above and beyond the 35% increase observed in the 2021 survey. Furthermore, 68% of survey respondents anticipate more outsourcing in the coming three years.

Source: DKSH Healthcare Commercial Outsource Tracking Study (2025)

Anticipated Outsourcing Level in the Next 3 Years



The Future Role of Outsource Partners



It is clear that the key to unlocking the potential of future high performing CO partnerships is to go beyond the traditional transactional outsourcing model. Particularly in a region as dynamic and diverse as APAC, winning CO models must go beyond a simple plug-and-play approach. Exponential value-lock lies in recognizing CO partners not as downstream vendors, but rather as co-strategists with strong healthcare expertise and commercial acumen rooted in local markets. As Figure 2a and 2b highlights, we are already seeing clear signs of evolution and success in CO models. The executives we surveyed are more positive about CO partnership in 2025 – finding better fitting partners, indicating higher approval ratings and durability of the relationships, and realizing cost and value efficiencies.

Figure 2a: Improved CO partner matching and alignment in the recent period.

Source: DKSH Healthcare Commercial Outsource Tracking Study (2025)

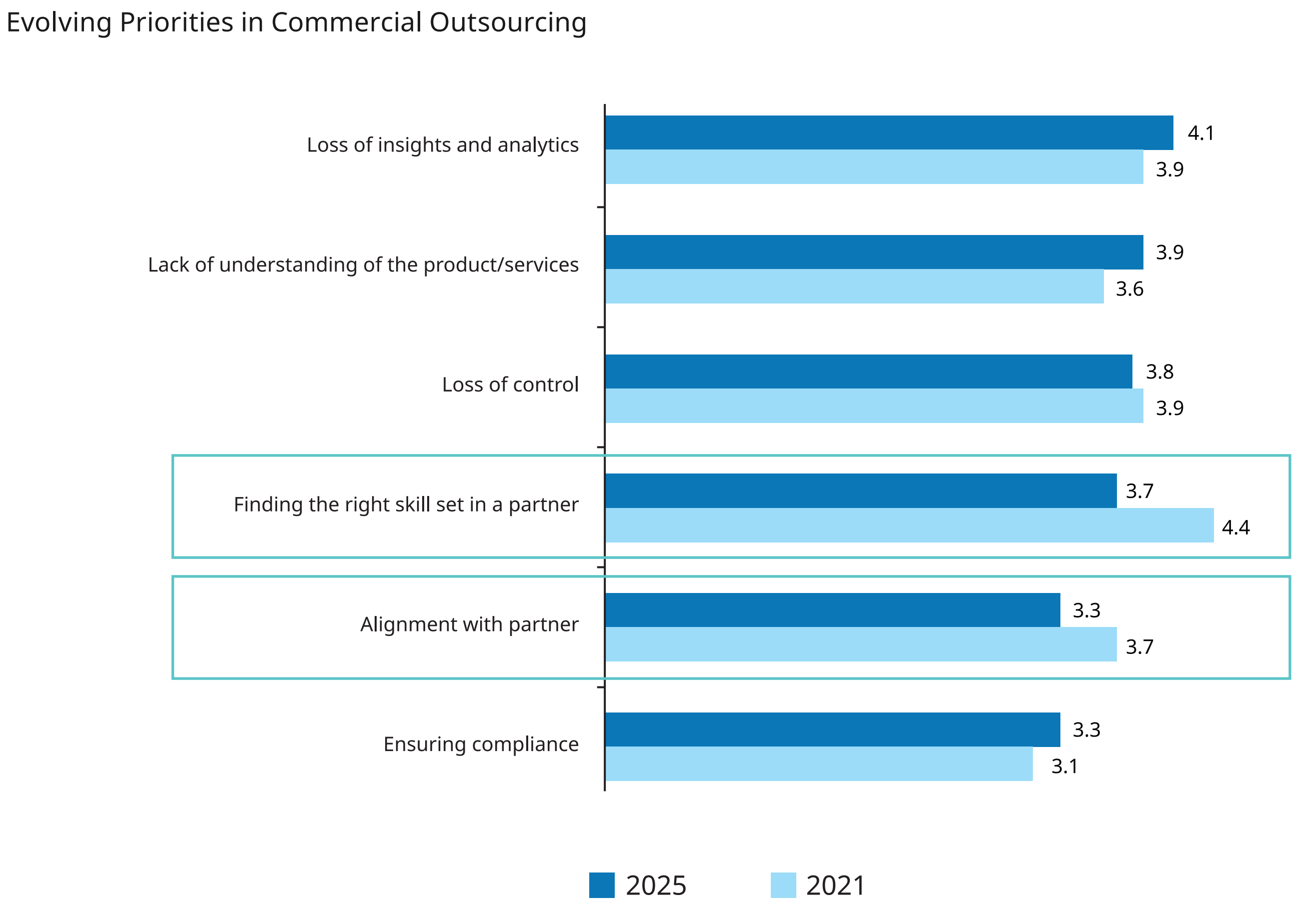
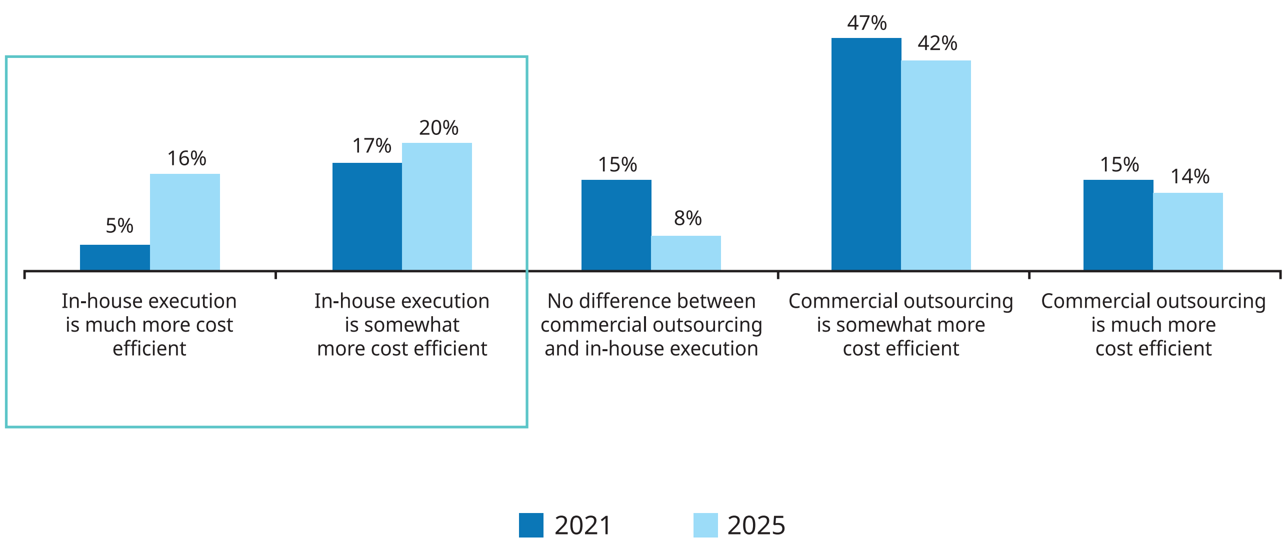


Figure 2b: Improved CO partner cost efficiencies in the recent period.

Source: DKSH Healthcare Commercial Outsource Tracking Study (2025)



We feel our commercial outsourcing partnership, especially for sales & marketing expertise, is far higher [in performance] than initially expected. DKSH's extensive experience with various partnership, the quality of reports, communications and their responsiveness to requests are very impressive. Additionally, DKSH has experienced members in each market possessing high expertise in compliance management, which is crucial in Asia.

— Kazunori Komatsu, VP, Head of Partnership Management (Kyowa Kirin)

To achieve sustainable growth within a CO go-to-market partnership model, it is critical to move beyond conceptualization and actively embed partners as strategic extensions of the principal business—ensuring alignment, mutual accountability, and a shared commitment to long-term success. From our experience and based on input from for regional executives, some best practices to consider include:

- **Effective integration and onboarding** – Robust people and process integration, including in-depth product and scientific training at the very start of the partnership.
- **Co-creation and shared objectives** – Connecting strategy, messaging, and KPIs to drive a more harmonious business execution and encourage synergies across both principal client and outsourcing partner
- **Schedule regular joint business planning –** Involving CO partners in regional strategy and lifecycle planning to consistently track progress, identify learnings and pivot when necessary
- **Leverage data and transparency –** Adopt digital tools for real-time sales data, market insights, and business analytics to enable joint decision-making and agile pivots.
- **Establish performance-tiered model** – Structuring win-win models that reward shared value creation (rather than just volume alone).

There is so much opportunity for healthcare companies and CO partners to grow together in the APAC region. From our experience, realizing this opportunity is as much a mindset shift toward a strategic relationship as it is an operational plan of tactical execution.

— Bijay Singh, Global Head (DKSH Healthcare)

Building CO relationships into the future

With the opportunity for CO partnerships growing to support the increasing demands in healthcare markets across APAC, regional executives are also increasing expectations for expanded CO service offerings. Looking at CO services of interest from regional executives (see Figure 3), we see that there is a mix of needs across sales, marketing, regulatory, and inventory management. These results indicate an appetite to drive holistic go-to-market models beyond just distribution & logistics. Notably, we also see stronger interest in functions like Pharmacy and Medical sales promotion, signalling interest towards core commercial capabilities.

Figure 3: Evolving expectations of traditional as well as expanded offerings of CO partners.
Source: DKSH Healthcare Commercial Outsource Tracking Study (2025)

Top Services for Commercial Outsourcing

2021 (Then)	%
E-commerce services (digital marketing, channel management, etc.)	43%
Hospital tender management	37%
Medical channel sales/promotion	34%
Key Account Management	32%
Regulatory filling, approval & post-marketing maintenance	32%

2025 (Now)	%
Pharmacy sales/promotion	53%
Medical channel sales/promotion	52%
E-commerce services (digital marketing, channel management, etc.)	41%
Hospital tender management	37%
Regulatory filling, approval & post-marketing maintenance	34%

Digitization continues to be top of mind. From our survey, we saw more than half of regional executives would like to see deeper digitalization and AI intergration – with 58% looking for additional data analytics and market insights, coupled with a 60/40 ratio of digital/face-to-face engagement techniques for Health Care Professionals (HCPs).

> There are a number of trends coming. This includes the continued digitalization of healthcare, especially in commercial engagement and patient support. There will also be the need to maintain strong personal relationships with HCPs, government bodies, and decision-makers to protect the position of established brands amid rising generic competition and pricing pressures.
>
> — Kim Sophie Rabensdorf, Head of Regional Sales APAC (Cheplapharm)

While it is critical to continue developing and evolving service offerings, successful CO partnerss must complement the right services with expert alliance teams and capabilities. Flexible and adaptive models will be critical to navigating anticipated shifts. Drawing on our experience and insights from regional executives, we recommend that CO partnerships prioritize building core capabilities that enable relevance, agility, and strategic impact. These capabilities form a resilient foundation for long-term growth, helping partnership stay competitive and aligned in a rapidly changing environment.

- **Key Account Management** – Proactively servicing principal clients by establishing strong engagement and relationships, with tailored Key Account Management (KAM) approaches especially for more complicated multi-market / multi-category partnerships. Empowered by data and insights, KAMs serve as cross functional business manager to craft tailored fit solutions.

- **Data, analytics and reporting** – Providing principal client partners with market, HCP, and consumer insights rooted in research and data to drive strategy thinking. Efficient generation of actionable data insights, by leveraging embedded digital tools to provide consistency and standardization.

- **Field force and commercial excellence** – Powered by digitally-enabled tools and demand management (e.g. AI-driven CRM platforms and persona generation), multi-channel engagement across HCP types (e.g., pharmacists, nurses, doctors), and marketing across traditional as well as digital platforms.

- **Medical excellence** – Medical research and real-world evidence generation, Continuing Medical Education (CME), regulatory support, , and HCP and Key Opinion Leader (KOL) engagement on deeply clinical topics.

- **Launch excellence for innovative medicines** – Comprehensive pre-launch planning and cross-functional coordination to ensure successful entry and adoption of new molecules, especially in the critical pre-launch phase. This includes market access readiness, pricing strategy, omnichannel HCP engagement, performance dashboards for real-time monitoring, and post-launch analysis and next steps.

- **Access and government affairs** – Relationships with key government bodies, including advocacy and policy shaping capabilities to improve access and investment into healthcare innovations.

> The market has been evolving. So the commercial outsourcing business model has also evolved -- from a focus on established products now to new and innovative products being launched. This would need a different skill set and require strengthening the capability of our partners to be able to launch these new molecules.
>
> — Andy Abarquez, Senior Director - South Asia Alliance General Manager (Lilly)

To further future-proof current CO relationships, it is important to also consider anticipated medium-term trends. Regional executives we've engaged with have highlighted key developments that are shaping the future of CO. Table 1 outlines the top emerging themes, followed by a deeper dive into selected service offerings for further consideration.

Table 1: Medium-Term Trends in APAC and Considerations for Future-Proofing CO Strategies

Emerging Theme	Impact to CO Strategies
Data management and AI acceleration	CO partners will be expected to deliver more than reach – they will need to offer next gen insights. Examples could include omnichannel engagement platforms, physician and patient segmentation models, predictive analytics for field force optimization, and real-time tracking dashboards and predictive modeling for compliance and sales.
ESG and Compliance	As sustainability and compliance rise in importance for Boardroom and Government Bodies, CO arrangements will also need to embed environmental targets (e.g. green logistics, low-emission warehousing) and social impact standards (e.g. workers' welfare, ethical sourcing). Even better if the CO partner are listed companies that comply with the highest ethical standards in business practices and clinical engagement, disclosing ESG performance as part of their reporting cycles.
Resilience and Crisis Preparedness	Post-pandemic, CO providers must expect the unexpected. Can the CO partner respond to supply chain shocks? Is there local autonomy in decision-making? Are continuity plans in place for any disruptions?

> Just as principal companies continually invest in their teams and capabilities for growth, commercial outsourcing partners must do the same as well. There needs to be intentional commitment from both sides to stay engaged and forward looking - to nurture the partnership, anticipate future market trends and drive continuous learning and advancement. This growth mindset allows the partnership to stay ahead of the rapid changes and evolving needs across Asia-Pacific.
>
> — Abhay Bangi, Asean and Singapore Life Sciences and Health Care Leader (EY Parthenon)

This strategic shift of the CO relationship is no longer a choice but rather a necessity for sustaining a competitive advantage in APAC's rapidly evolving healthcare environment. While CO providers continue strengthening services and capabilities to meet the expanding expectations of their principal counterparts, there will be specific and tailored opportunities for both parties to enable a more strategic partnership model together, to maximize scale and revenue potential.

Governance – the glue that holds partnerships together

Ultimately, even the most well-designed and forward-looking CO arrangements are at risk of failing without robust governance structures in place. Governance provides the guardrails to help unlock CO from a cost center into a sustainable competitive advantage. Prevailing risks range all the way from contracts (e.g., lack of commercial alignment) through to compliance (e.g., off-label promotion, inappropriate clinician engagement, data breaches). The following are governance best practices from our experience for regional executives to consider:

- **Contractual clarity** – Establishing clear roles, responsibilities, and service-level agreements, including regulatory obligations and escalation protocols.
- **Joint operating committees** – Ensuring structured and recurring engagement at strategic, operational, and compliance levels.
- **Training and enablement** – Equipping both internal and external teams with aligned messaging, systems, and regulatory training.
- **Feedback loops** – Creating mechanisms for ongoing performance reviews, lessons learned, and model refinement, leveraging technology for real-time monitoring.

> Commercial Outsourcing Partnerships should be viewed as "two-way doors," allowing for flexibility and adjustment as the market and portfolio needs change. For outsourcing to be a viable option for more expansive partnerships, particularly for earlier, more specialized in-market products, partners must enhance their capabilities. This means developing more sophisticated medical engagement models that go far beyond the old "tell-and-sell" approach. We need to grow together as strategic partners.
>
> — Chris Willmott, Head of Foundational Products APAC & LMIC (Roche)

With the CO landscape in APAC becoming more sophisticated and the continued growth in the region , pharmaceutical and life sciences companies must think more boldly about their go-to-market approach if they want to maximize the available opportunities - don't unnecessarily leave growth and revenue on the table. Throughout our article series, we hope to have demonstrated why traditional models are no longer enough, provided a roadmap for implementing new CO partnership, and set the direction for a more strategic, future-proofed outsourcing model to drive sustainable growth. This is the moment to get CO right – not only for today's pressures, but for tomorrow's opportunities. If you would like to explore how to tailor your CO strategy to business goals and APAC priorities, we are ready to support.

With 160 years of experience, we are proud to share these insights and best practices with regional leaders. Of course, these are only the starting point of deeper conversations about growth strategies in the region., So we hope to connect with many of you over the coming months to plan for successful CO partnerships ahead.

— Bijay Singh, Global Head (DKSH Healthcare)

Case Study: Strategic Partnership for Sustainable Growth in Southeast Asia

Background & Objectives
In 2019, a Leading Global Healthcare Company transitioned to a Commercial Outsourcing (CO) model across Southeast Asia, selecting DKSH Healthcare as its full agency partner across multiple markets. With a stagnant portfolio and limited internal growth capacity, the Company aimed to optimize and variablise costs -- in preparation for future launches in oncology, immunology, and cardiovascular-metabolic (CVM) areas.

Approach & Execution
In Singapore, DKSH Healthcare built a dedicated commercial team across Sales, Marketing, Medical, Supply Chain, and Finance to take on full operational responsibility as the Marketing Authorization Holder. The transition was anchored in structured onboarding, knowledge transfer, and early investment in launch excellence. DKSH absorbed key employees the Company and implemented CRM and S&OP tools to ensure continuity and performance.

Governance was a cornerstone of the partnership, with joint business reviews, brand planning, and performance tracking embedded from the outset. The collaboration emphasized co-creation, transparency, and mutual accountability—hallmarks of a winning strategic CO relationship.

Results & Impact
- Achieved performance targets consistently year on year
- 25% portfolio growth projected in 2025 vs PY
- Market leadership for a key brand within three years
- Expanded patient access through MAF listings
- Successful new launches across multiple therapeutic areas

This engagement exemplifies the future of CO in APAC: a shift from transactional outsourcing to strategic partnership. By embedding governance, building capabilities, and aligning long-term goals, DKSH helped the Company unlock scale, agility, and improved patient outcomes—reinforcing CO as a growth enabler, not just a cost lever.

Key references:

Proprietary market research, internal DKSH data and analysis were conducted – building also on publicly reported findings from IQVIA, LEK, Evaluate, Capital IQ, Press Search, Statistica, WHO, World Bank, and Euromonitor. Please send us a request for any specific queries about data sources for the article series.

DKSH Healthcare is a leading strategic healthcare solutions partner providing a full range of distribution, commercial outsourcing, and market expansion services for pharmaceutical, OTC, consumer health, and medical device companies in Asia Pacific.

Our integrated service offerings are unmatched across the regions. We offer end-to-end solutions that include registration, market entry studies, inventory management, physical distribution, redressing, invoicing and cash collection, marketing and sales, patient solutions/support programs, and more. With our industry leading marketing and sales competencies supported by regulatory affairs, as well as our commitment to international quality standards and corporate compliance – we set the benchmark for healthcare commercial outsourcing in Asia Pacific.

- **Active in 16 APAC markets**
- **Across multiple trade channels including: modern and traditional trade, drugstores, pharmacies, clinics, hospitals, and eCommerce platforms.**
- **250,000 customer distribution drop-off points**
- **4,000 sales force specialists**
- **140 medical and regulatory experts**

With thanks to our input sources

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