NEGLECTED DISEASE RESEARCH & DEVELOPMENT: A FIVE YEAR REVIEW
Policy Cures

Innovative ideas and accurate analysis to accelerate development and uptake of new drugs, vaccines, diagnostics and other products for neglected diseases of the developing world.
G-FINDER
OVERVIEW

- Annual survey of global investment into R&D of new neglected disease products
- Neutral, comparable, comprehensive analysis
- Commissioned by the Bill & Melinda Gates Foundation
G-FINDER
SCOPE & METHODOLOGY

- 31 neglected diseases
- 134 product areas
- All R&D stages
- Data from 204 organisations
- Over 8,000 entries
Findings
OVERALL

$3,045m invested into R&D for new neglected disease products in 2011
Findings
OVERALL

$2.5bn  $2.8bn  $3.0bn  $2.9bn  $2.9bn

2007  2008  2009  2010  2011

$443.7m higher in 2011 than in 2007
Findings

DISEASES

Top tier diseases
- HIV/AIDS
- Malaria
- TB
Findings

DISEASES

2nd tier diseases
- Dengue
- Diarrhoeal diseases
- Kinetoplastids
- Bacterial pneumonia & meningitis
- Helminth infections
- Salmonella infections
Findings
DISEASES

3rd tier diseases
Trachoma
Leprosy
Buruli ulcer
Rheumatic fever

First tier diseases
Second tier diseases
Third tier diseases
Findings

DISEASES

2007-2011

2009-2011: Post-Global Financial Crisis

- HIV/AIDS: -10%
- Diarrhoeal diseases: -18%
- Kinetoplastids: -26%
- Rheumatic fever: -71%

Malaria: $560m, +19%
TB: $530m, +29%
Helminths: $80m, +37%
Dengue: $230m, +194%
Bacterial pneumonia & meningitis: $100m, +194%

HIV/AIDS: <$1bn
Diarrhoeal diseases: $150m
Kinetoplastids: $130m
Rheumatic fever: <$1m
Increased investments from multinational pharmaceutical companies have offset cuts from the philanthropic sector.
2007-2011 was a turbulent period for public funders.
Philanthropic funding has declined sharply since the global financial crisis - mostly reflecting changes in funding from the Gates Foundation.
Industry funding has increased dramatically with the majority due to dengue vaccines and TB drugs.
## Findings
### TOP FUNDERS

<table>
<thead>
<tr>
<th>Funder</th>
<th>Average (US$)</th>
<th>Average (%)</th>
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<tbody>
<tr>
<td>US NIH</td>
<td>1,159,146,846</td>
<td>39.2%</td>
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<tr>
<td>Gates Foundation</td>
<td>506,068,577</td>
<td>17.1%</td>
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<td>Industry</td>
<td>407,415,472</td>
<td>13.8%</td>
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<td>European Commission</td>
<td>113,462,229</td>
<td>3.8%</td>
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<tr>
<td>USAID</td>
<td>83,255,653</td>
<td>2.8%</td>
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<tr>
<td>US DOD</td>
<td>80,605,929</td>
<td>2.7%</td>
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<tr>
<td>The Wellcome Trust</td>
<td>72,245,100</td>
<td>2.4%</td>
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<tr>
<td>UK DFID</td>
<td>69,630,927</td>
<td>2.4%</td>
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<td>UK MRC</td>
<td>54,148,502</td>
<td>1.8%</td>
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<td>Institut Pasteur</td>
<td>32,202,567</td>
<td>1.1%</td>
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<td>Dutch DGIS</td>
<td>25,718,636</td>
<td>0.9%</td>
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<tr>
<td>Australian NHMRC</td>
<td>20,122,741</td>
<td>0.7%</td>
</tr>
</tbody>
</table>
Findings

PDP FUNDING

PDP funding 2007-2011

Dramatic decrease in funding for PDPs since 2008, largely driven by cuts from the philanthropic sector.
Discussion

The global financial crisis has not had a dramatic impact on overall neglected disease R&D funding.
There has been a shift in industry funding towards semi-commercial diseases.
Discussion

Philanthropic funding is heavily focused on product development

Philanthropic funding, 2007-2011

Type of R&D funded, 2011

Product Development: 80%
Public funding continues to shift away from product development and towards traditional basic research.

Discussion

Change in type of research funded 2007-2011

+28%

Basic Research

-1%

Product Development
The changing investment patterns by different sectors are favouring some neglected diseases over others.

- **Semi-commercial diseases**: 70+% on product development.
- **Neglected diseases with significant philanthropic stake**: 60% on product development.
- **Public-funding reliant diseases**: 45% on product development.
Download the full report at www.policycures.org/g-finder2012.html