

SASDER 12. Ulusal
Kongre
14 Kasım 2025

GSK

İlaçta Yeni Dinamikler,
Yeni Dengeler

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CFO GSK Türkiye
and Interim General Manager

About GSK and our focus on prevention

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Our purpose is to unite science, technology and talent to get ahead of diseases together

GSK is a focused global biopharma company

+2 bn Patients impacted globally

£6.4 bn Global R&D investment in 2024

+150 Clinical trials underway

+70 New vaccines and medicines in our pipeline

+75
Markets worldwide

Rich heritage and strong investment in Türkiye

+30 mn Patients impacted locally

80% Products locally manufactured

+50 Clinical trials ongoing in Türkiye

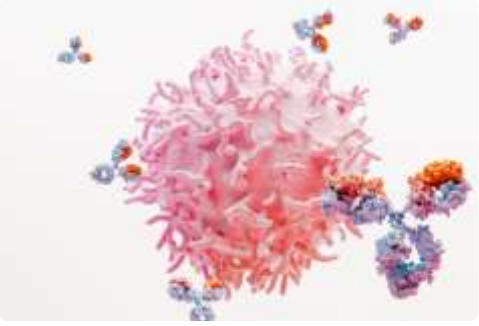
+100 Registered medicines and vaccines

+66 Years of GSK in Türkiye



We are innovating to help stop disease before it starts, prevent or slow progression

Prevention is a focus across our pipeline and portfolio, including



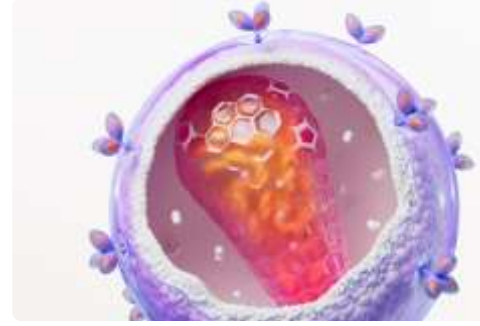
Respiratory, Immunology and Inflammation

We're harnessing our deep knowledge of inflammatory mechanisms and the science of the immune system to redefine the future of respiratory medicine and target lung, liver and kidney diseases



Oncology

Our ambition is to help increase overall quality of life, maximise survival and change the course of disease.



HIV

We're working to transform the lives of people living with HIV and help end the HIV epidemic through innovations in prevention and treatment.



Infectious diseases

Our combined expertise in vaccines and medicines means we can focus on both the prevention and treatment of infectious diseases.

Türkiye's health challenges:
Ageing population and rising chronic diseases

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Türkiye has achieved remarkable success in **increasing life expectancy** over the years. Today's key challenge is **keeping people healthy**

In 1950s, Türkiye had a high proportion of children and a life expectancy of **~44 years**¹

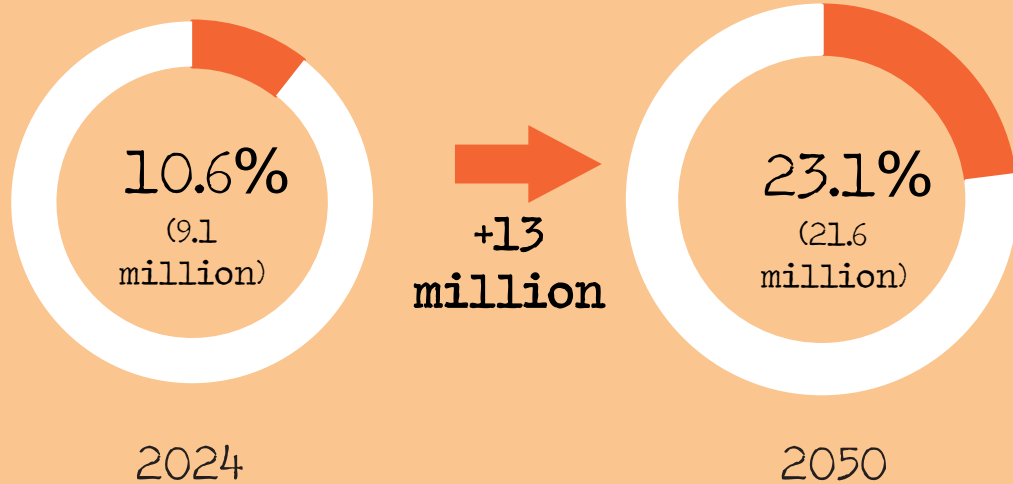
Today, Türkiye has a high proportion of older people and a life expectancy of **78.1 years** at birth²

A 65-year-old Turkish male today can expect to live another **16.3 years** and a female another **19.6 years**²

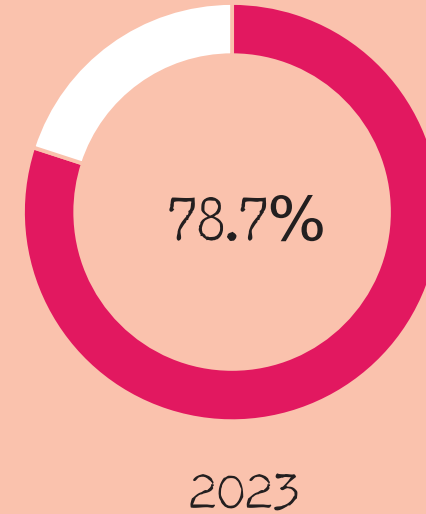
References: 1. Ministry of Health: <https://www.saglik.gov.tr/TR-11492/tarihce.html> ; 2. TÜİK 2024 Demographics: <https://data.tuik.gov.tr/Bulten/Index?p=Hayat-Tablolari-2022-2024-54081>

Ageing population is putting more pressure on Turkish health system

+65 population in Türkiye^{1,2}



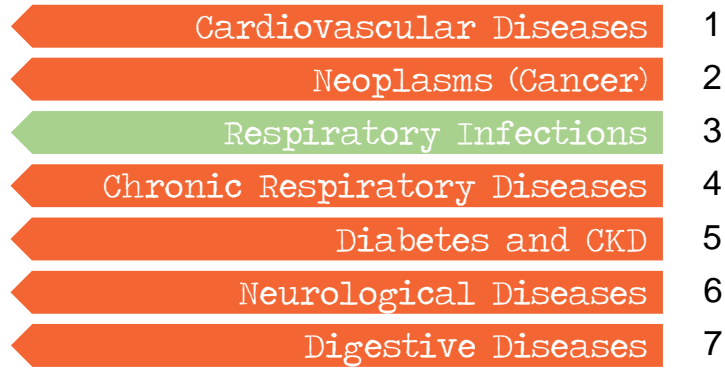
%+65 population with ≥ 1 chronic disease³



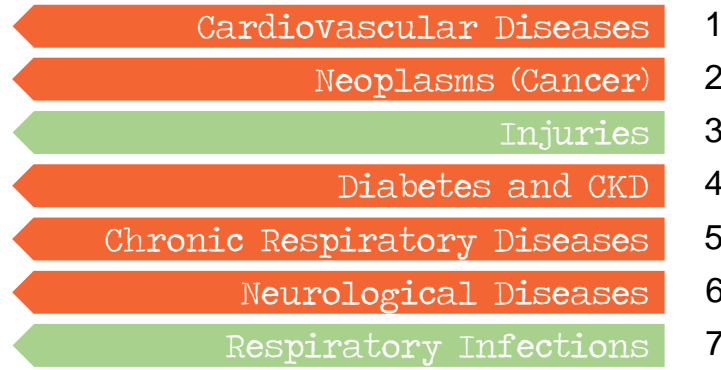
References: 1. TUIK Elderly Statistics 2024: <https://data.tuik.gov.tr/Bulten/Index?p=Istatistiklerle-Yaslilar-2024-54079>; 2. TUIK Demographics Projection 2023-2100: <https://data.tuik.gov.tr/Bulten/Index?p=Nufus-Projeksiyonlari-2023-2100-53699>; 3. TUIK 2023 Survey on Elder Profile <https://data.tuik.gov.tr/Bulten/Index?p=Turkiye-Yasli-Profil-Arastirmasi-2023-53809>

Chronic diseases constitute 75% of all causes of deaths globally and 80% in Türkiye

All cause deaths (Global)¹



All cause deaths (Türkiye)¹



■ Non-communicable diseases

- Cardiovascular diseases alone cost countries **2% of GDP** each year²
- Türkiye spends **1.2 trillion TL** to healthcare overall, 4.7% of its GDP³

References: 1. Institute for Health Metrics and Evaluation (IHME). Global Burden of Disease, Türkiye 2023 data: <https://vizhub.healthdata.org/gbd-compare/>; 2. Luengo-Fernandez et al. Eur Heart J 2023 Dec 1;44(45):4752-4767; 3. TÜİK Healthcare Spending Statistics 2023: <https://data.tuik.gov.tr/Bulten/Index?p=Saglik-Harcamalari-Istatistikleri-2023-53561>

Investing in prevention and treatment can ease health and economic burden of chronic health conditions in Türkiye

Türkiye can gain 5 million years of healthy life and \$91 billion

Potential impact of such investment for Türkiye is estimated by McKinsey Health Institute:¹

Health impact in 2050

Premature deaths prevented

325,000

Years of healthy life added

5 million

Increase in life expectancy at birth

+4 years
to 86 years

Economic impact in 2050

Increase in gross domestic product

\$91 billion

Return for every \$1 invested

3.4x

Reference: 1. McKinsey Health Institute. From crisis to catalyst: Investing in addressing noncommunicable diseases. Sept 2025: <https://www.mckinsey.com/mhi/our-insights/from-crisis-to-catalyst-investing-in-addressing-noncommunicable-diseases>

Role of immunization in preventing diseases
and reducing burden of chronic diseases

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People living with **chronic conditions** are more **vulnerable to vaccines preventable diseases** and their complications

Compared to healthy population



Diabetes patients
are
up to **2 X**
more likely to die
from **influenza**¹



CHF patients have
up to **2 X**
higher risk of
developing **herpes**
zoster-related
complications³



COPD patients face
up to **13 X**
higher
hospitalizations
risk due to **RSV**²

CHF = Chronic Heart Failure, RSV = Respiratory Syncytial Virus

References: 1. Marshall RJ et al. mBio 2020 Mar 24;11(2):e02841-19; 2. Penders Y et al. Curr Allergy Asthma Rep. 2025 Feb 25;25(1):14; 3. Muñoz-Quiles et al. BMC Infectious Diseases (2020) 20:905

Vaccination is one of the most powerful and cost-effective tools for prevention¹⁻³



154 million lives saved over the last 50 years and
+3 million lives saved each year by vaccination worldwide⁴



19x return to economy of 1\$ investment in adult vaccinations such as influenza, herpes zoster, pneumococcal and RSV⁵

RSV = Respiratory Syncytial Virus

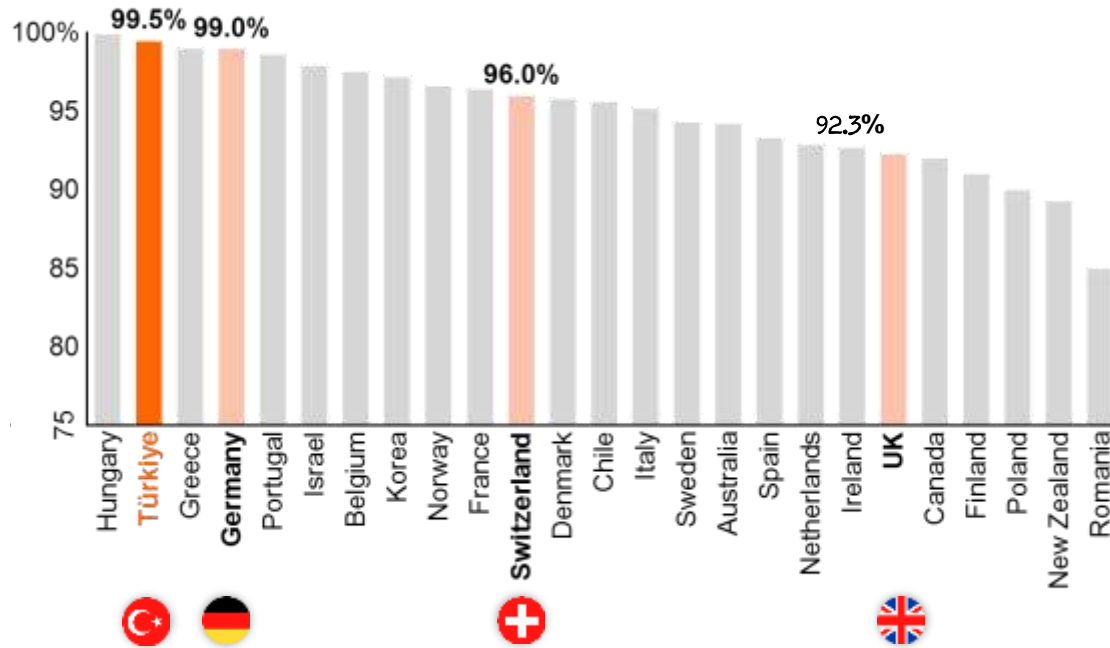
References: 1. Greenwood B et al. Biol Sci 2014;369:20130433; 2. Arnetz BB, et al. BMC Res Notes. 2020;13:362; 3.WHO, UNICEF, World Bank, State of the world's vaccines and immunization, 3rd ed. Geneva, World Health Organization, 2009, p.122; 4. Bärnighausen T et al. Proc Natl Acad Sci. 2014;111:12313-19 and Shattock AJ et al. Lancet 2024 May 2;S0140-6736(24); 5. Office of Health Economics (OHE). Socio-Economic Value of Adult Immunization Programs: <https://www.ohe.org/publications/the-socio-economic-value-of-adult-immunisation-programmes>

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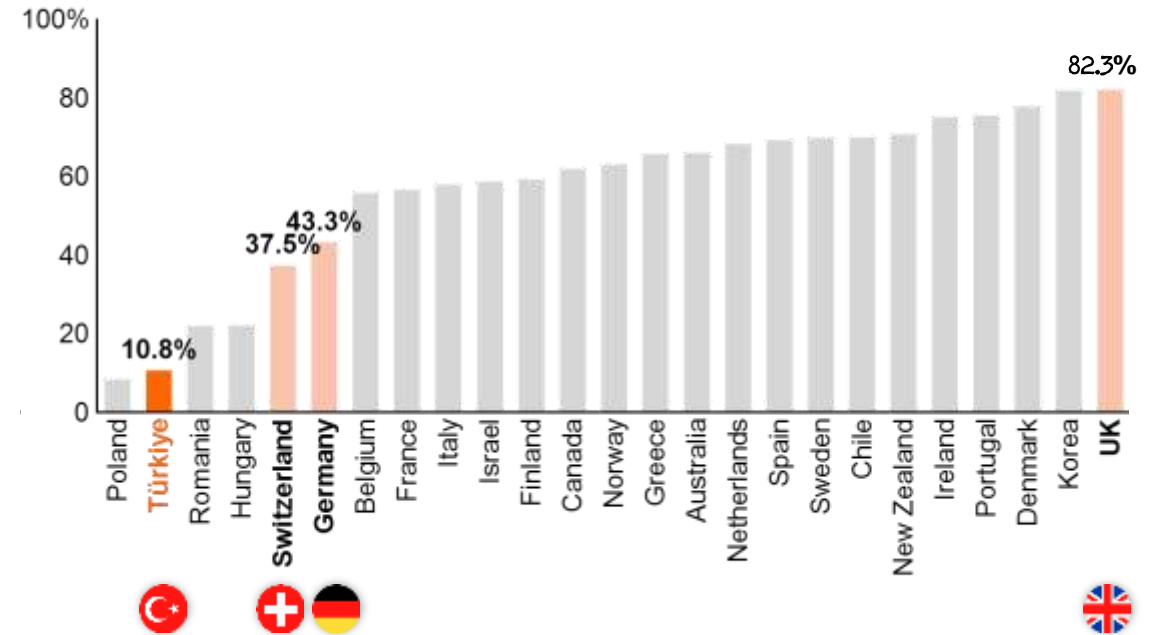
Bu içerik yalnızca bilgilendirme amaçlı olup, tanıtım materyali olarak algılanmamalıdır.

Drawing on the success of pediatric vaccination, Türkiye can achieve a world class **adult immunization program**

Child vaccination rates: % of children aged ≤ 1 immunized for DTP, 2022¹



Adult vaccination rates: % of adults aged 65+ immunized for flu, 2022²



DTP: Diphtheria, tetanus and pertussis

References: 1. OECD 2022 Indicators: <https://www.oecd.org/en/data/indicators/child-vaccination-rates.html>; 2. OECD 2022 Indicators: <https://www.oecd.org/en/data/indicators/influenza-vaccination-rates.html>

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New dynamics and global trends in immunization

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Shifting toward life-course immunization

Global Trend

- A fundamental trend in global health is the **shift toward a life-course immunization paradigm** – treating vaccination as a lifelong preventive strategy, not just for children.¹
- Countries are expanding vaccine programs to protect adults especially at higher risks, as part of **healthy ageing** initiatives.

Good Practices

- Italy's **Calendar for Life** integrates adult vaccines into a national schedule, ensuring access across all ages.²
- **Health Ageing** initiatives in Portugal and Korea are promoting lifelong immunization policies.^{3,4}



References: 1. WHO Immunization Agenda 2030: A Global Strategy to Leave No One Behind. <https://www.who.int/teams/immunization-vaccines-and-biologicals/strategies/ia2030>; 2. Italian Ministry of Health. "National Immunization Plan and Calendar for Life"; 3. Directorate-General of Health, Portugal. "Longevidade Initiative: Promoting Healthy Ageing and Lifelong Immunization"; 4. Korea Disease Control and Prevention Agency (KDCA). "Healthy Ageing Forum and Adult Immunization Strategy: <https://www.kdca.go.kr>

Broadening prevention beyond infectious diseases

Global Trend

- Vaccination is increasingly **embedded into chronic disease management** since adults with conditions like diabetes or heart disease face higher risks.
- **Digital tools**—such as e-health records, AI-based alerts, and personalized vaccine platforms—help identify high-risk patients and prompt timely vaccination.

Good Practices

- **France's MesVaccins platform** offers tailored vaccine recommendations based on risk factors, supporting chronic disease management.¹
- **South Korea's IRIS system** sends automated SMS reminders contributing to one of the world's highest flu immunization rates for 65+.²



References: 1. MesVaccins: MesVaccins.net - French digital vaccination card and clinical decision support system: <https://mesvaccins.net>; 2. Junghee Kim et al. J Korean Med Sci. 2024 Apr 1;39(12):e119: <https://jkms.org/pdf/10.3346/jkms.2024.39.e119>

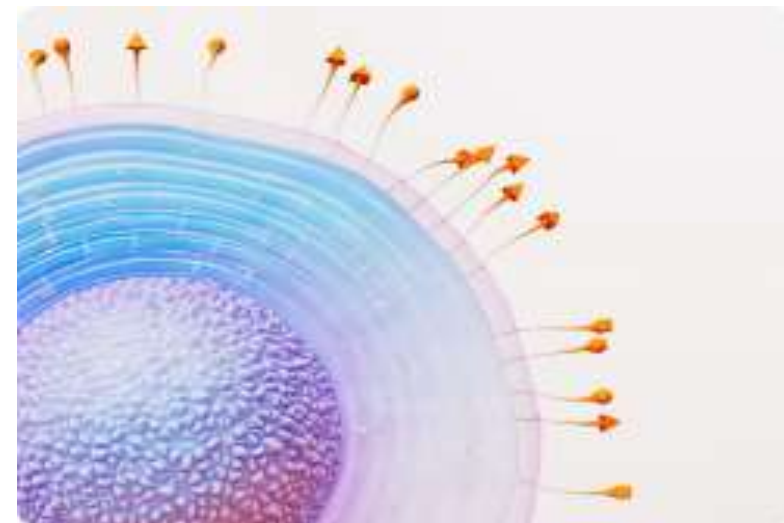
Breakthroughs in vaccine science: novel and more effective solutions

Global Trend

- Over **80% of vaccines** in development now **target adults** – driven by next-generation platforms. There are **98 new vaccines** in the pipeline with 12 different technologies (such as mRNA, recombinant etc).¹
- Increasing adoption of **novel and more effective vaccines** after pandemic.

Good Practices

- Health systems of **Greece, Poland, Saudi Arabia, UAE, South Korea, Australia** etc. quickly adopted new adult vaccines into their public and private programs.
- Strong coverage of new adult vaccines by private insurers in **US, Canada** and **Germany**



Reference: 1. Vaccines Europe 2024 Pipeline: <https://www.vaccineurope.eu/vaccines-ecosystem/vaccines-pipeline/>

Alternative funding approaches for adult immunization

Global Trend

- Governments and private insurers are adopting **new funding models** to expand access to adult vaccines.
- These include **complementary insurance, co-payment schemes, preventive care bundles** and employer-sponsored programs etc.

Good Practices

- **France** reimburses new adult vaccines covering 65% of cost through government and remainder via complementary private insurance.¹
- **Japan** uses a co-payment model for adult vaccines: costs shared between government and individuals.²
- In **Mexico** private insurers offer preventive care bundles that includes adult vaccines in check-up programs.



- In **Brazil**, private insurers partner with at-home vaccination services to deliver new adult vaccines to their members.⁴

References: 1. <https://www.mesvaccins.net/web/vaccines>; 2. Japan Ministry of Health, Labour and Welfare. Routine and Voluntary Vaccination Programs: https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/kenkou_iryou/kenkou/vaccine.html; 3. Asociación Mexicana de Instituciones de Seguros: <https://www.amis.com.mx> 4. Vaccination at Home Services in Brazil: <https://pitchbook.com>

Teşekkürler

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