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Life Sciences Consulting Perspectives

Summer 2026

POSSIBILITY IS IN THE ASCENT

Summary and Key Contact Details – Global Life Sciences Advisory

Introduction

Life Science Consulting services provide critical and timely expertise across regulated industries, requiring deep technical knowledge that can expedite the development and successful commercialization of life-saving drugs, devices and diagnostics. We hope you find our periodic updates informative, and we are available to share more in-depth insights

Transactions & Valuations

We tracked 75 Life Sciences Consulting transactions during TTM Q1 '26 – flat to FY 2025 levels. Time will tell if deal flow has found a steady state. We are monitoring a robust deal pipeline in YTD '26, suggesting FY numbers reverse the recent trend of declining activity.

Commercialization services continued to be in demand, followed by Technology Enablement and Software Implementation

Overall, valuation metrics are slightly below pandemic-levels, however we observe a divergence between high-demand assets trading at multiples elevated to the broader set

Market Review

Updated views on macro trends affecting Pharma Services and Life Sciences

- **Biopharma Investment Trends**: Private Investment remains selective and IPOs remain scarce, However, Biopharma M&A and licensing have accelerated with elevated profits and impending patent cliffs, partially buoying public market valuations. China cements its position as a drug development leader accounting for 50% of licensing deals
- **Legislation and Regulatory Effects:** EU – Joint Clinical Assessment (JCA) reshapes Market Access Planning
- **Legislation and Regulatory Effects:** US – FDA advances implementation of Real-time Clinical Trials
- **AI in Pharma Services**: Biopharma's investment in GenAI forces service providers to adapt to maintain relevance

About Alantra

Alantra is a listed independent partnership providing global mid-market investment banking and asset management services. Since 2020, Alantra has advised on over 1,300 transactions totaling over €300bn in volume. Alantra is a unique proposition for the middle market with leading sector expertise and leveraging a network of over 500 professionals across 18 offices in 17 countries

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Alantra Life Sciences Consulting Capability Map – Informed by buyer interactions, we view market participants as combinations of 55 service capabilities

Portfolio Strategy	Regulatory	Non-clinical	Clinical	Quality & Compliance	Manufacturing & Supply Chain	Commercial	Safety & Vigilance	Organization
Market Assessment	Strategy	Model-informed Drug Development	CRO Selection & Qualification	Inspection & Audit Readiness	Formulation & Process Development	Market Access	Clinical Pharmacovigilance	Management & Governance
Asset / Technology Evaluation	Submissions	Toxicology	Clinical Trial Design	Quality Management Systems	Logistics	Pricing & Reimbursement	Medical Information	Organization Design & Transformation
Portfolio Licensing & Development	Operations	Pharmacology	Clinical Trial Management	Commissioning, Qual. & Validation	Engineering	Pre-approval & Managed Access	QPPV	Software Implementation
Integrated Dev. Strategy	Health Authority Interactions	DMPK	Clinical Trial Operations	Quality Assurance & Qualified Person	Tech Transfer	Marketing & Communications	Literature Monitoring	
	Life Cycle Support	Risk Assessment & Mitigation	Board & Committee Review	Legal Compliance		Medical Affairs	Adverse Event / ICSR Processing	
	CMC		Site Enablement & Start-up			Evidence & Value	Signal Management	
	Advertising & Promotional Review		Patient Recruitment & Engagement			Analytics & Intelligence	Safety Reporting	
	Intelligence		Medical Affairs					
			Biostatistics & Data Management					

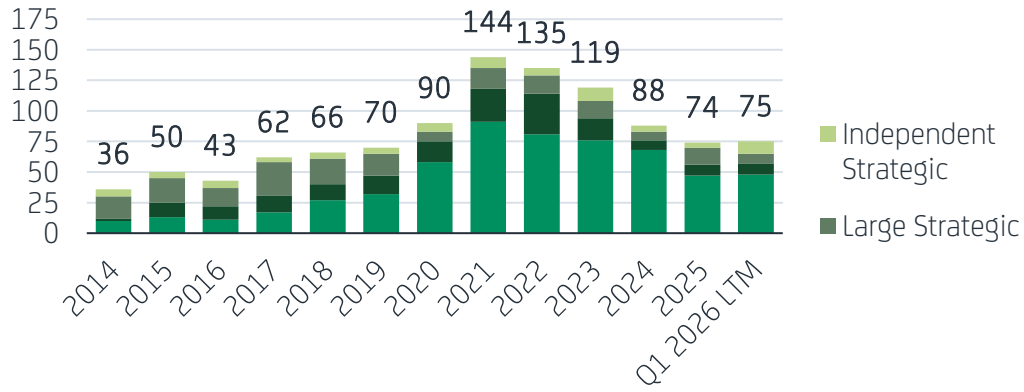
Other

United States Presence	European Presence	Technology Enablement

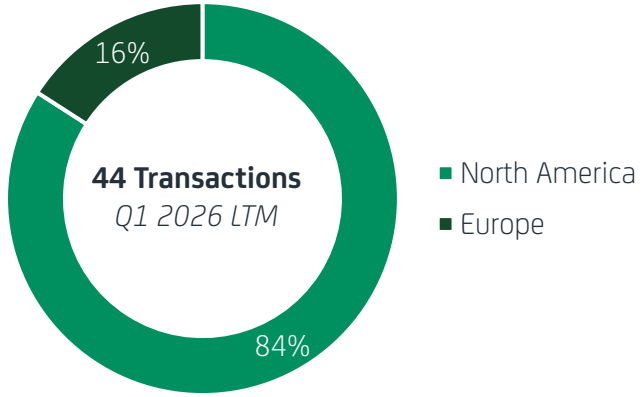
Transactions & Valuations

M&A volume was stable, albeit down from Pandemic peak, while PE platform add-ons have been resilient

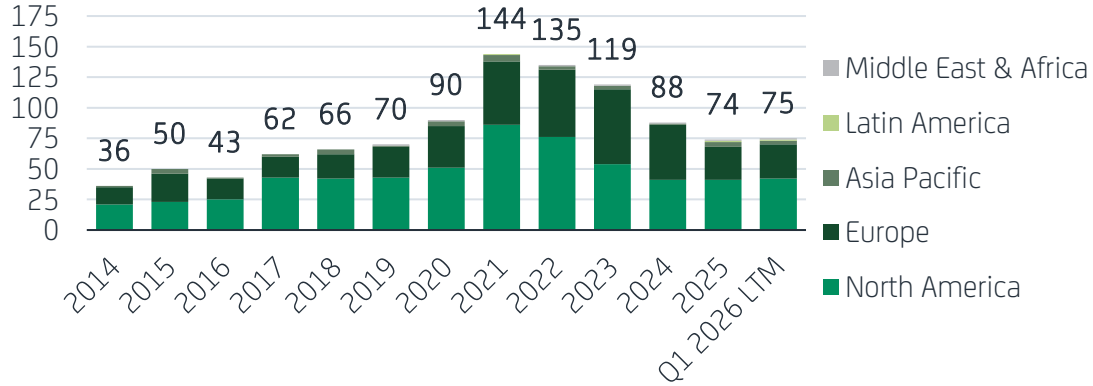
Global Life Sciences Consulting M&A Volume by Transaction Type



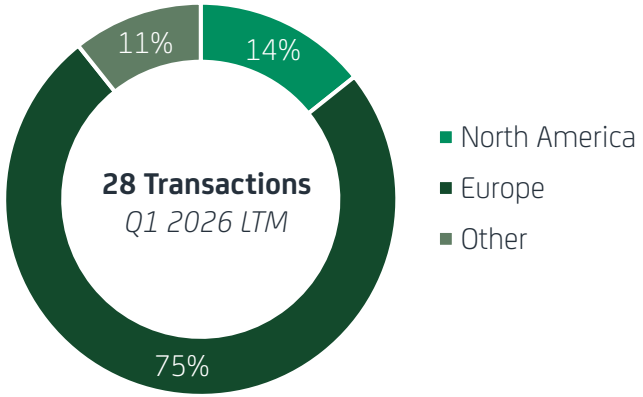
North American Buyers, % of Q1 2026 LTM M&A Transactions by Target Geography[1]



Global Life Sciences Consulting M&A Volume by Target Geography



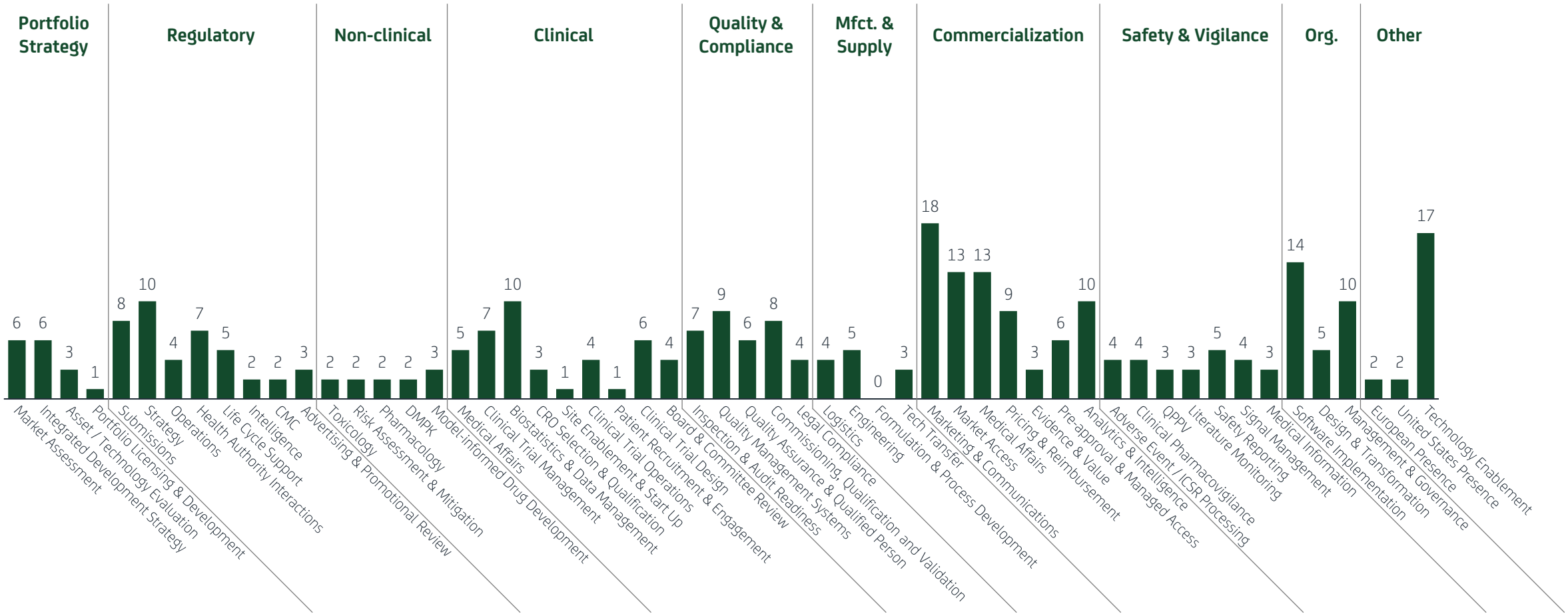
European Buyers, % of Q1 2026 LTM M&A Transactions by Target Geography[1]



Note: Based on proprietary Alantra transaction database
(1) Total of 75 buyers includes three from the Asia Pacific region

Commercialization continues to lead in deal activity, while the past year has seen an uptick in Marketing & Communications and Technology Enablement

Life Sciences Consulting Capabilities Acquired, Last Twelve Months[1]



Note: Based on proprietary Alantra transaction database. Service classifications based on publicly-disclosed information at the time of acquisition. One M&A target may have multiple services

(1) As of May 2026

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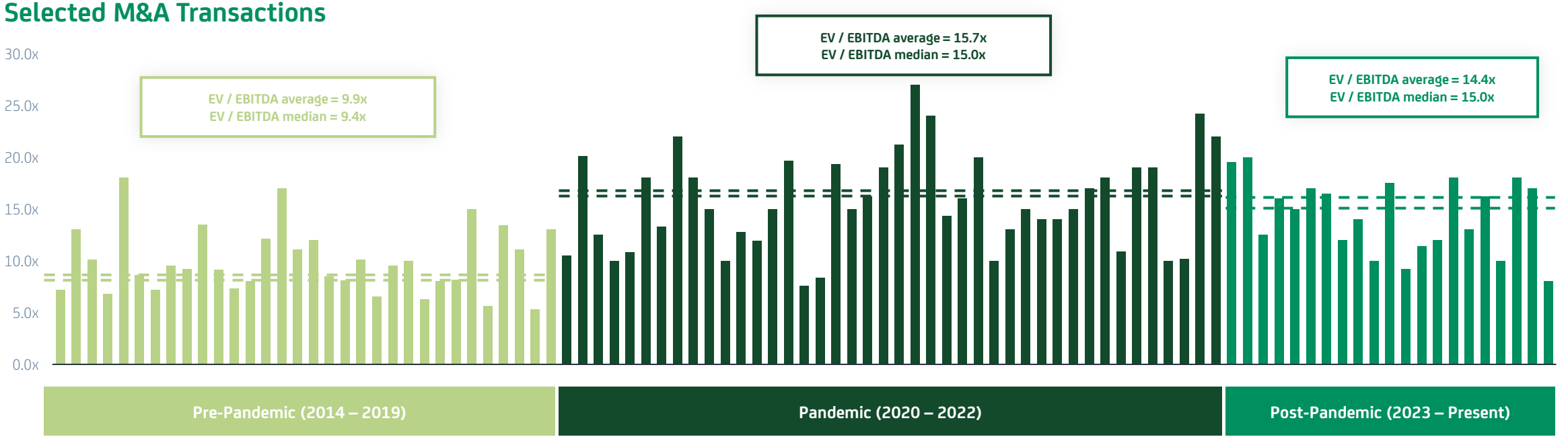
Life Sciences Consulting valuations **stepped up during the pandemic period, while high-demand assets** remain strong post-pandemic

Selected M&A Transactions



Median valuation metrics are in line with Pandemic-era valuation, while average multiples have declined. This reflects a divergence between high-demand assets trading at elevated multiples, whereas other assets are trading slightly above pre-pandemic levels

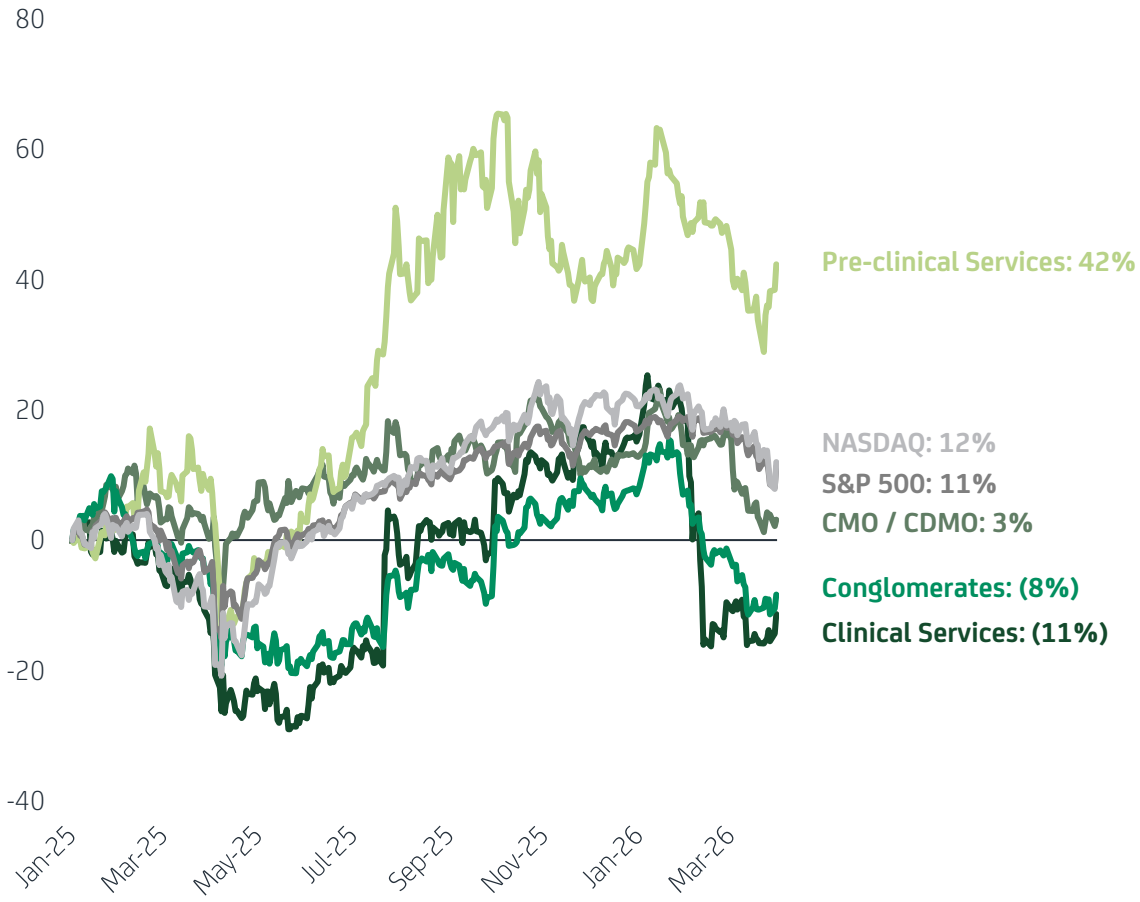
Valuation disconnects continue to be the primary factor in transactions that fail to close

Note: Based on proprietary Alantra transaction database. Service classifications based on publicly-disclosed information at the time of acquisition. One M&A target may have multiple services

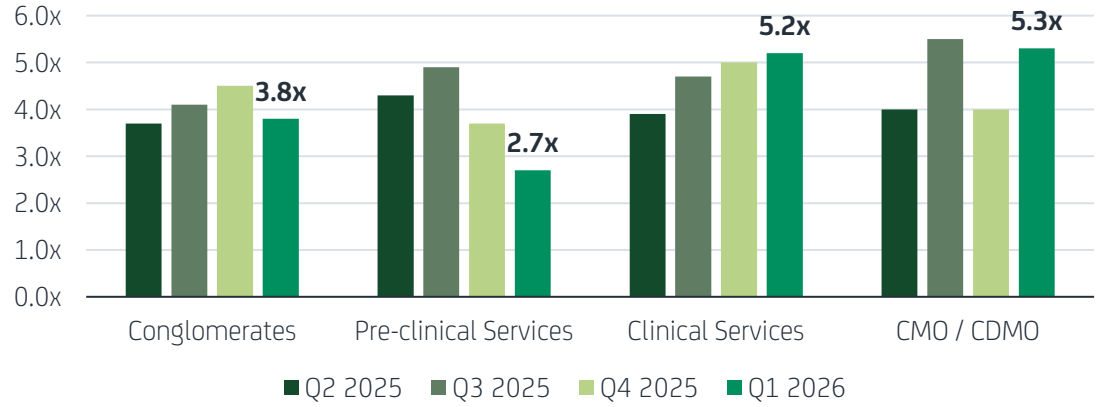
(1) As of May 2026

Performance in the public markets has been highly varied depending on segment. Clinical services vendors have been particularly impacted **by market uncertainty**

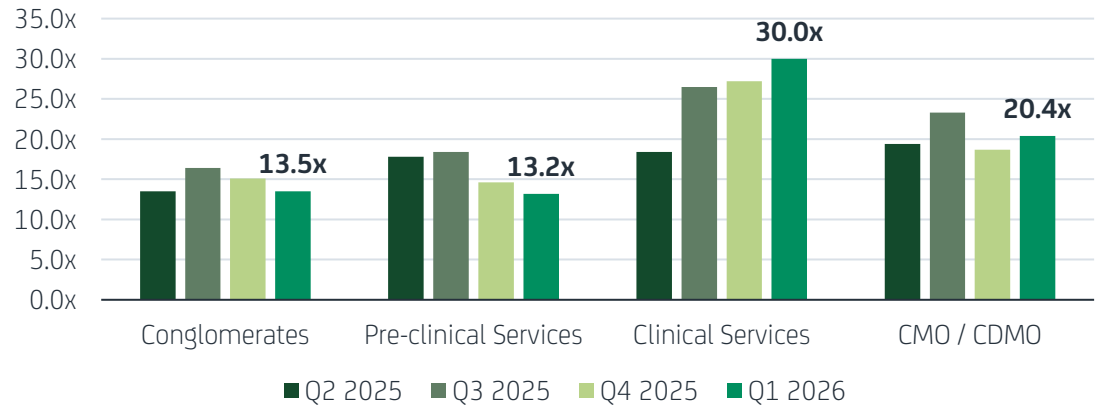
Public Markets Performance



Public Markets Valuations – EV / LTM Revenue



Public Markets Valuations – EV / LTM EBITDA

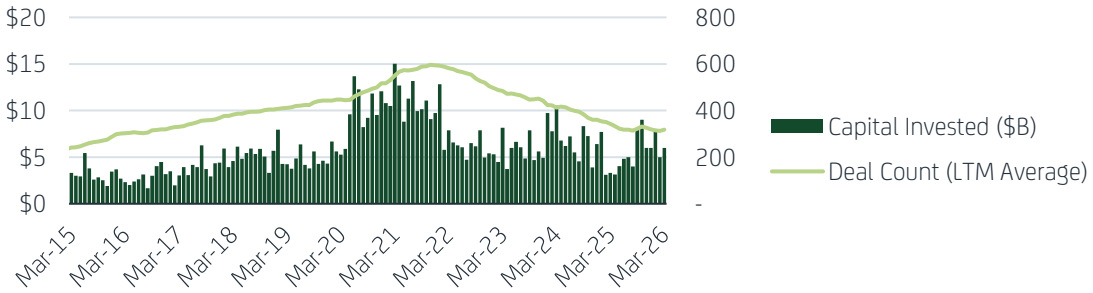


Conglomerates: LH, TMO, IQV, BDX, DHR,SHSE:603259; Pre-clinical Services: SHSE:688202, SHSE:603259, QTRX, SHSE:688222, ABCL, SEHK:1548, CRL, EVT, SZSE:301096, Olink Holding AB, SEHK:1521, NOTV, WSE:SLV, SHSE:688046, SZSE:300759, TSE:2395, HYFT, CERT, SHSE:603127, DNA, OABI, CPSE:GUBRA; Clinical Services: IQV, ICLR, SZSE:301333, SHSE:688621, CMIC HOLDINGS, MEDP, ERGOMED GROUP, SYNEOS HEALTH, FTRE, SZSE:300347; CMO / CDMO: AVID BIOSCIENCES, WST, SWX:LONN, SWX:SFZN, STVN, SOCIETAL CDMO, SZSE:002821, CATALENT, SZSE:300363, KOSE:A207940, SZSE: 300759, OTCPK:PROC.F

Market Review

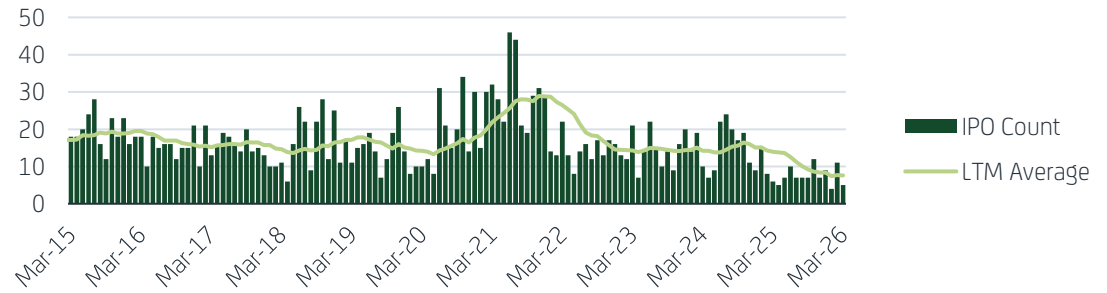
Biopharma Investment Trends: Increased M&A activity by biopharma provides exit visibility for investors—counteracting the tepid IPO market

Global Biotech & Pharmaceutical Fundraising[1]



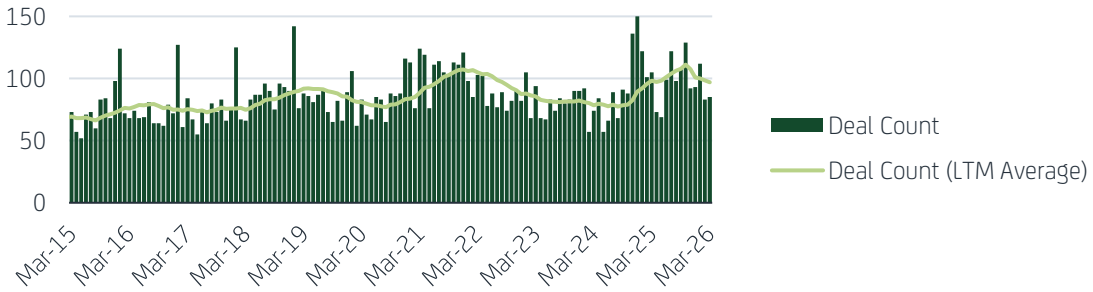
Biopharma fundraising remains selective, with capital deployment supported by larger financings while overall deal activity remains below historical peak levels.

Global Biotech & Pharmaceutical Initial Public Offerings



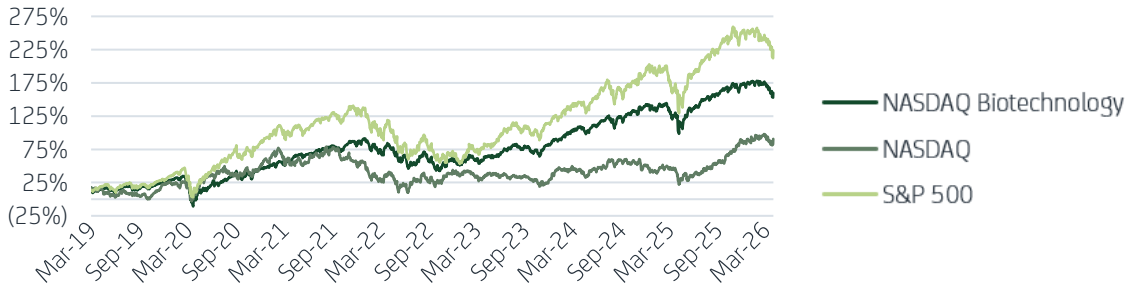
Biopharma IPO activity remains subdued amidst several negative macro headwinds. While the number of floats was flat to Q1 '26, capital raised more than doubled to $2.2B

Global Biotech & Pharmaceutical M&A



Biopharma M&A activity remains resilient relative to other financing channels, with deal volumes supported by continued demand for differentiated assets and strategic pipeline replenishment.

Biotech & Pharmaceutical Public Markets Performance



Biotechnology equities continue to trail broader market indices, reflecting ongoing investor selectivity versus momentum for tech heavy indices

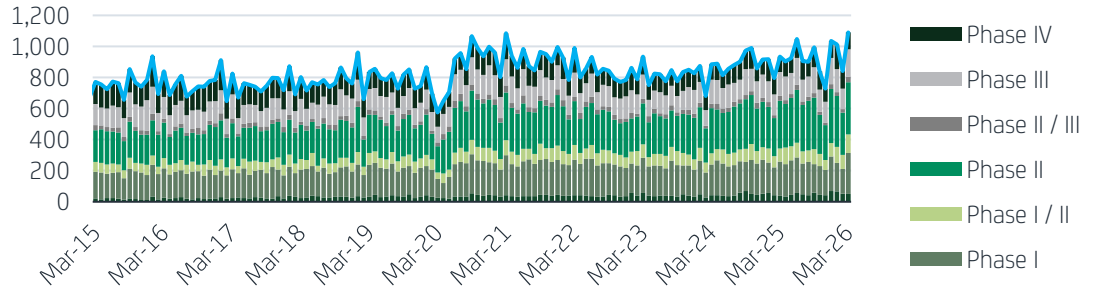
Sources: Pitchbook

(1) Includes private and public fundraises

Biopharma Development Trends: Clinical Activity remains elevated above Pre-Pandemic era and China emerges as a drug development leader

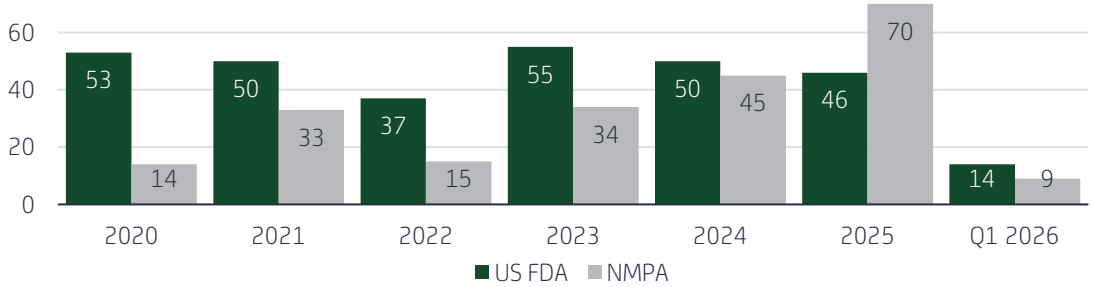
- China continues to emerge as a major originator of novel biopharma assets. NMPA has approved 9 novel/Class 1 drugs through April 2026, with Chinese-origin assets continuing to grow in share of Western pharma licensing activity
- China is assuming a leadership position in global biopharma development, accounting for 50% of global biopharma deals with upfronts over $50m, and 75% of the aggregate amount of upfront payments.
- Trials remain above pre-pandemic levels, especially in APAC/China. IRA-driven incentives, pricing pressure, FDA uncertainty, and broader policy has shifted therapeutic focus away from Medicare-exposed small-molecule programs.

Global Clinical Trial Starts



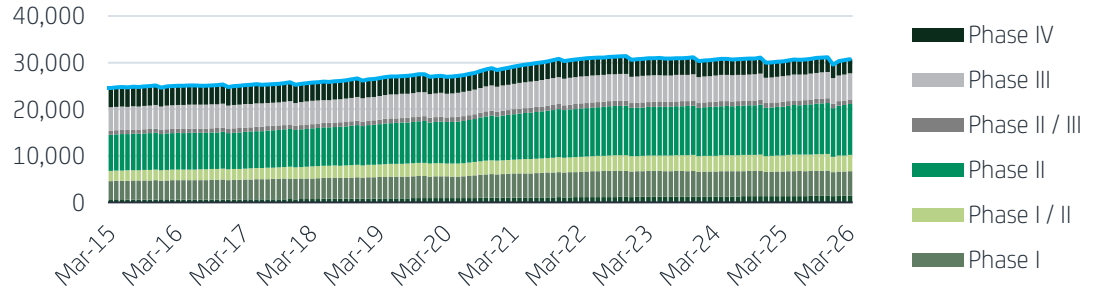
Trial starts remained elevated through Q1 2026, approaching historic highs driven primarily by Phase II and Phase III programs, reflecting continued investment in mid-stage development pipelines.

Novel Drug Approvals, US FDA CDER and China's NMPA Class 1[1]



Novel drug approvals maintained strong momentum into 2026, with 14 FDA approvals in Q1 following 46 approvals recorded in 2025.

Global Active Clinical Trials



Active clinical trials remained near historic highs through Q1 2026, supported by continued growth in Phase II and III development activity.

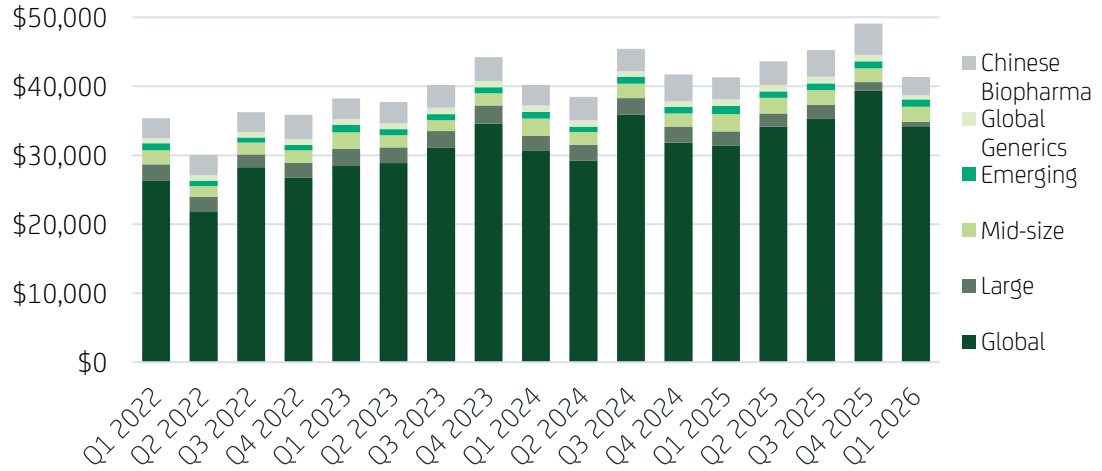
Sources: ClinicalTrials.gov, FDA, NMPA, JP Morgan Dealforma

Note: (1)- Excluded Traditional Chinese Medicine Products (TCM); Nature Reviews Drug Discovery March 2026, FDA Website and NMPA website and PharmCube

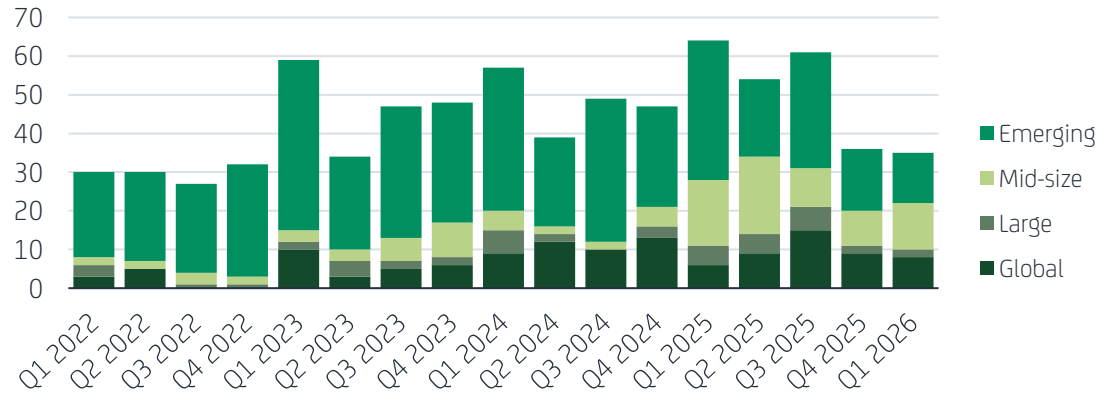
Biopharmaceutical Industry R&D Spend and Layoffs: **R&D investment shows resilience while full-year layoffs were elevated largely due to capital constraints**

- The Biopharma industry is grappling with increased uncertainty arising from pricing pressures from potential most-favored nation (MFN) pricing policy, margin-pressure from potential tariffs, and regulatory uncertainty resulting from numerous changes at the FDA. Meanwhile the industry needs to replace revenue from upcoming patent expirations
- While pockets of momentum are emerging among smaller and emerging biopharma companies, overall industry R&D trends continue to be primarily driven by sustained investment levels from large and global biopharma
- Q1 2026 R&D spend by the global biopharma industry is roughly in line with 2025 levels in the face of ongoing uncertainty
- The elevated number of announced layoffs over the last two years showed signs of leveling off in Q4 2025, a trend that has continued into 2026.
- Ongoing reduced company formation and a narrower funnel of early-stage biopharma programs, potentially putting near-term downward pressure on demand for outsourced services
- Workforce reductions across biopharma signal a focus on operating efficiency and cost discipline, with the backdrop of increased investment in AI to find efficiencies across the pharma value chain. This dynamic creates a murky view of future workforce needs and the impact that internal Biopharma use of AI may have on outsourced pharma services

R&D Spend, Public Biopharmaceuticals ($M)[1]



Biopharmaceutical Companies Announcing Layoffs[1]



Note: As of March 31st, 2026; Sources: Capital IQ, Fierce

(1) Biopharma size tiers segmented by market value – Global: >$10B; Large: >$1B; Mid-size: >$100M; Emerging: <$100M

Legislation and Regulatory Effects: EU Joint Clinical Assessment (JCA) Reshapes Market Access Planning Across Oncology & Rare Disease

What the JCA changes

- Creates a single EU clinical evidence assessment to support national Health Technology Assessment (HTA) processes across the 27 EU Member States
- Intended to reduce duplicative clinical reviews across Member States
- Does not replace national reimbursement, budget impact, or cost-effectiveness assessments

Key Operational Challenge: PICO Scoping

- JCA scope is built around the following four pillars: Population, Intervention, Comparator, Outcomes ("PICO")
- Member States contribute country-specific PICO requirements that are consolidated into the final assessment scope
- Manufacturers must prepare for multiple comparator expectations, endpoint variability, indirect treatment comparisons ("ITCs"), and evidence gaps across jurisdictions
- Timeline pressure constrains ability to generate new evidence before the JCA submission deadline after final PICO scope is known, creating a need for expert guidance in aligning PICO scope with measured clinical outcomes
- Germany, France and other mature HTA markets expected to retain significant local decision-making influence

JCA should accelerate M&A consolidation among market-access and health economics outcomes research (HEOR) specialists on both sides of the Atlantic as clients increasingly need one integrated platform spanning EU-level evidence strategy and local reimbursement execution.

JCA timeline

January 12, 2025:
Mandatory for new oncology medications (anti-neoplastics) and Advanced Therapy Medicinal Products (ATMPs)

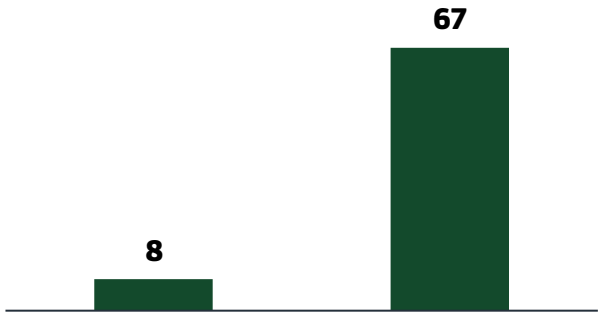
April 30, 2026:
Ojemda (tovorafenib), an oncology orphan drug for pediatric low-grade glioma, received the first-ever JCA report approval

January 2028:
Mandatory expansion to include all new orphan drug indications

January 2030:
Mandatory expansion to all centrally authorized medicines

Emerging trends

PICO Explosion in Precision Oncology



Complexity largely driven by biomarker- and histology-based subpopulations

JCA Growth Since Adoption

JCA implementation is expanding rapidly across high-complexity therapeutic areas

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Legislation and Regulatory Effects: Real-Time FDA Review – Where We Were (RTOR)

What is Real-Time Oncology Review (RTOR)

- RTOR launched by FDA Oncology Center of Excellence ("OCE") in 2018
- Allows sponsors to submit topline efficacy and key datasets before complete application submission
- FDA reviewers can begin evaluation earlier than under traditional NDA/BLA timelines

RTOR eligibility

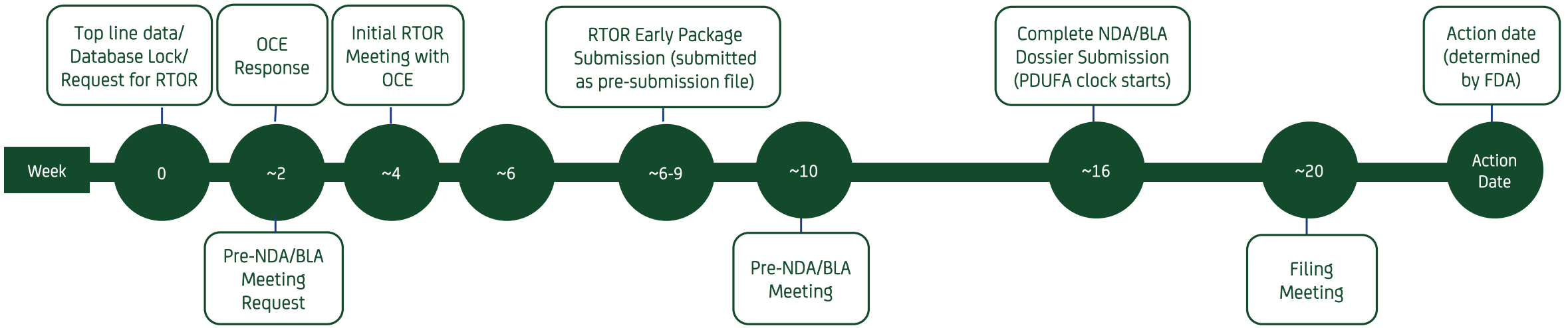
Submissions for the RTOR program should meet the following

- Classified as an oncology therapy
- Drugs likely to demonstrate substantial improvements over available therapy or meeting criteria for Expedited Programs
- Straightforward study designs
- Endpoints that can be easily interpreted (e.g., overall survival, response rates, etc.).

RTOR impact

- The FDA has stated that ~27% of oncology applications and ~28% of supplemental oncology applications were being processed through RTOR
- RTOR submissions were received a median of 5.7 weeks before final application submission
- Median FDA approval time under RTOR was approximately 3.3 months from application submission
- According to the American Association of Pharmaceutical Scientists (AAPS), RTOR reduced median approval timelines by 2.2 months for NMEs and 2.7 months for supplements vs traditional priority review pathways

RTOR timeline



Source: FDA

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Legislation and Regulatory Effects: Real-Time FDA Review – Where We Are Now (RTCT)

The Problem: Legacy Trial Workflows

- Early-phase clinical trials are a bottleneck in drug development, often characterized by high uncertainty, limited patient populations, and inefficient decision-making processes
- At present, most clinical development occurs in discrete phases. Because each defined phase of clinical development is run according to a protocol and typically as a separate study, there is generally a hiatus in the development program after one phase ends and the next begins. This slows the pace of product development.

The Solution: RTCT

- On April 28, 2026, The U.S. Food and Drug Administration announced an initiative to advance the implementation of real-time clinical trials (RTCT)
- The FDA released a Request for Information (RFI) regarding a proposed pilot program for RTCT. The FDA accepted comments on the RFI until May 29, 2026. The FDA intends to disseminate final selection criteria in July and complete pilot selections in August
- Because real-time trials allow the FDA to view key insights in real time, the hiatus between phases of legacy clinical trials could be eliminated or reduced to a minimum, enabling "continuous" trials

Current RTCT pilots

Sponsor	Trial name	Phase	Indication	Site(s)	Facilitator
AstraZeneca	TRAVERSE	2	Treatment-naïve mantle cell lymphoma	MD Anderson Cancer Center; University of Pennsylvania Abramson Cancer Center	Paradigm
AMGEN	STREAM-SCLC	1b	Limited-stage small cell lung carcinoma	In process of selection	In process of selection

Source: FDA

AI in Pharma Services

- According to Deloitte[1], nearly 90% of AI-driven value in life sciences is expected to be generated across R&D, manufacturing & supply chain, and commercial operations, highlighting the significant opportunity for service providers supporting these end markets
- Biopharma companies continue to invest in their own AI applications across the organization. As pharma begins to realize the benefits of their own investment in AI, it is likely some service segments may see margin compression as sponsors expect pricing to reflect the efficiencies that they have achieved internally
- To maintain position pharma service providers must incorporate AI into client-facing offerings and internal delivery processes to enhance efficiency, quality and scalability.
- The greatest impact is being observed in document- and data-intensive service lines, including medical writing, literature monitoring, pharmacovigilance, regulatory submissions, clinical operations and commercial analytics, where AI can streamline workflows and reduce manual effort
- For example, over 50% of pharma Med Affairs teams have utilized Generative AI to tailor content for specific audiences[2]. While Competitive Intelligence tools are automating the curation of publicly available content[3]
- As AI capabilities become more embedded within service delivery, competitive differentiation is increasingly driven by proprietary technology, data assets and therapeutic expertise rather than labor scale alone
- While AI is expected to automate many repetitive and administrative activities, human oversight remains critical across regulatory, clinical and commercial functions to ensure quality, compliance and strategic decision-making

Examples of AI Investment across Pharma Services

IQVIA	IQVIA announced IQVIA.ai, describing it as a unified agentic AI platform supporting clinical development, commercialization and real-world evidence workflows.
CERTARA	Certara's CoAuthor platform is positioned as a GenAI solution for regulatory and medical writing, including submission document generation and review.
indegene	Indegene has published multiple releases on GenAI-enabled content creation for clinical trial documentation, medical affairs support and omnichannel commercialization solutions.
ZS	Expanded ZAIDYN, an AI-powered life sciences intelligence platform spanning commercial, medical, patient and content workflows
accenture	Proprietary analytics platform Trials360.ai to improve trial planning and diversity

46%
of Pharma companies use AI for disease target identification

200+
AI-enabled drugs currently in clinical development

+18%
Potential top-line growth enabled by AI, with lower people-cost growth

35-40%
of competitive intelligence deliverables supported by AI-enabled secondary research

Notes: 1) GenAI in Pharma, Deloitte, accessed June 2026; 2) Insights At Scale : the growing value of GenAI in Pharma – Forbes ; 3) Generative AI PoCs in the Pharmaceutical Industry, IntuitionLabs, 2026

About Alantra

Alantra is the leading global mid-market investment bank

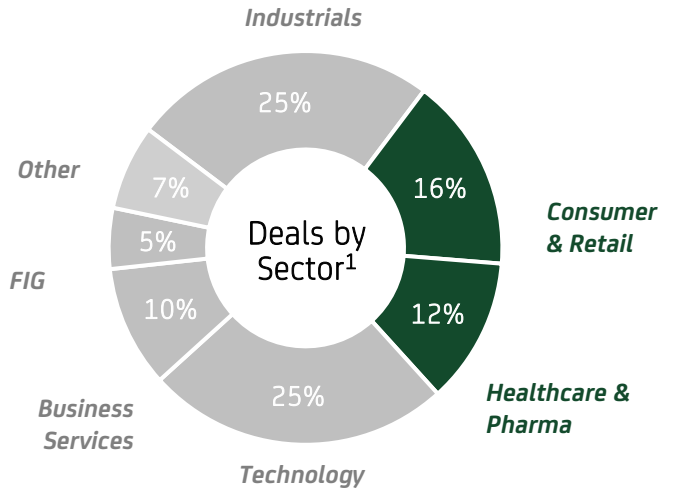
ALANTRA

The Global Mid-Market Specialist

- **Global mid-market investment banking and asset management firm** with offices in financial centers across the United States, Europe, the Middle East, Latin America, and Asia
- **Investment banking services offered include** M&A, debt advisory, strategic advisory, credit solutions, and equity capital markets
- **Asset management offerings include** private equity, active funds, private debt, energy, and venture capital
- **Listed independent partnership** since 2015 with North American and European roots going back decades
- **Middle-market focus** on deals involving enterprise values of $25M - $1B

Investment Banking Coverage

M&A	▪ Buy-side & sell-side ▪ Public takeovers ▪ Special situations
Debt	▪ Recapitalizations ▪ Acquisition financing ▪ "Stapled" financing
Equity	▪ Growth capital ▪ Acquisition capital ▪ Recapitalizations



17
Countries

520+
Financial Professionals

125+
Managing Directors

$590B+
Deal Volume[2]

2,300+
Total Transactions[2]

2,000+
Clients Advised[2]

1) Since 2025
2) Since 2013

Alantra Healthcare has seen strong momentum in the last 18 months

JUN 26 OrganiCare FemiClear CUROXEN Sell-side advisory Venture Life *Consumer Health*	JAN 26 21st CENTURY Sell-side advisory GRANT AVENUE *VMS*	DEC 25 LUXEMPART GROWING TOGETHER Buy-side advisory VALEARA *Services*	DEC 25 ORPHELIA PHARMA Sell-side advisory Orphalan *Pharma Services*	DEC 25 senevita emeis Sell-side advisory TERTIANUM *Services*	OCT 25 CapMan PHARMIA Sell-side advisory LABOMAR *CDMO*	SEP 25 Bansk Buy-side advisory BYOMA Yellow Wood PARTNERS *Dermatology*	SEP 25 COLISEE Sell-side advisory OUIHELP *Services*
JUL 25 aminolabs Buy-side advisory ZOKA PHARMA *CDMO*	JUN 25 Medik8 inflexion Sell-side advisory L'ORÉAL *Dermatology*	MAY 25 Venture Life CDMO Divestment Sell-side advisory biodue Riverside *CDMO*	APR 25 CardioDiagnostics Sell-side advisory CardioOne WINDROSE *HealthTech*	APR 25 Perrigo HBI Bittner Sell-side advisory DCC *CDMO*	APR 25 affidea GBL Buy-side advisory uroviva SPEZIALISTEN FÜR UROLOGIE ECM *Services*	MAR 25 MIGROS mibelle GROUP Sell-side advisory persán *Dermatology*	MAR 25 KIRKBI Buy-side advisory AMBOSS *HealthTech*

Knowledgeable team with recognized sector expertise and a passion for healthcare; leveraging a global platform to provide exceptional service to our clients

Christian Carlson, PhD
Director, Life Sciences

Highlights

10+ years R&D experience and 10+ years M&A experience

Prior

Crosstree, ARMGO Pharma, Albert Einstein College of Medicine, Northwestern, Abbott Laboratories

Andrey Dvorkin
Director, Healthcare & Life Sciences

Highlights

14+ years of M&A experience

Prior

Harris Williams, Piper Sandler, Rothschild & Co.

Rusty Ray
Partner,
Head of US Healthcare

Highlights

20+ years exclusive focus on Healthcare M&A

Prior

Crosstree, Apricus Bioscience, Brocair Partners, RFF, Meningitis Research Foundation

Zeke Navar
MD, HealthTech

Highlights

17+ years of dedicated HealthTech coverage

Prior

Crosstree, JMP, H2C, and Houlihan Lokey

Josh Garver
Managing Director

Charles Lanceley
Managing Director

Gianni Casanova
Partner

Frank Noat
Managing Partner

Christopher Jobst
Partner

Saad Ashraf
Managing Partner

Guillermo Arbolí
Managing Partner

Stefano Bellavita
Managing Partner

Richard Zhu
Managing Director

US based subject matter experts with deep local expertise and the capability to draw on a trusted global network for broader perspective and impact.

Complemented by a diverse network of partners and managing directors with deep, enduring relationships across Life Sciences and other critical healthcare sectors

Case Study – Sale of Halloran Consulting Group to ProductLife Group

Halloran Consulting Group was founded in 1998 by Laurie Halloran, one of the most highly-revered leaders in the life sciences industry. Over 25+ years, she bootstrapped Halloran into one of the **best-known brand names among specialty consultancies**. She began succession planning in 2020 with a partial equity sale to an Employee Stock Ownership Plan (ESOP) and elevation of key managers before **launching a full sale in 2023.**

Our transaction preparation encompassed **heavy reverse due diligence** to identify founder and other non-recurring expenses as well as evaluate historical revenue conversion to be able to **price off of 2024 budgeted financials** given the growth of the Company. We drafted highly-aesthetic marketing materials reflecting the strong brand as well as highly-granular financial and commercial operating analytics databooks.

Just days before our intended process launch in February 2024, Laurie Halloran unfortunately passed away. We swiftly worked with Halloran's legal counsel to ensure that a **sale of the Company from her estate would be frictionless**. We also had to revise our marketing materials and analytics to **strengthen the lack of any material role of Laurie** in the business for years.

Our deal outreach was met by almost **overwhelming interest in Halloran**. The process involved nearly **200 strategic and financial buyers**, inclusive of dozens of inbound inquiries. **~65%** of parties proceeded to receive the CIM, and we ultimately received **24 Indications of Interest.**

Following extensive coaching sessions with management to optimally position the Company, we held **on-site management meetings with 10 potential buyers**. We managed several parties who had hired pre-LOI financial, tax, and legal diligence advisors, and we **fulfilled over 1,000 diligence requests at this stage**. We ultimately received **several LOI submissions together with SPA markups.**

After executing our LOI and entering exclusivity with ProductLife Group, we **materially finished confirmatory due diligence within 30 days**. Together with Halloran's legal counsel, we managed **highly-complex SPA structuring** given the partial ESOP ownership of the Company.

In the midst of our completion of confirmatory diligence and SPA negotiation, **we were rocked by many internal and third-party hurdles**, including very challenging Board of Directors dynamics, resignation of a key manager, a pre-closing reduction in force, and French law-driven transaction administrative requirements, among others.

We successfully closed the transaction in **October 2024.**

Halloran CONSULTING GROUP

Sell-side advisory

PLG ProductLifeGroup

Alantra Served as Exclusive Financial Advisor to Halloran Consulting Group

Key Process Statistics

190+ Strategic & Financial Counterparties	**65%+** Initial Outreach to NDA / CIM Conversion Rate
24 Indications of Interest	**10x+** Sale EBITDA Multiple

ALANTRA

POSSIBILITY IS IN THE ASCENT

Argentina
Chile
China
Colombia
France
Germany
Greece
Ireland
Italy
Mexico
Nordics
Portugal
Spain
Switzerland
United Arab Emirates
United Kingdom
United States

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