

# Rising to the Demand:

## Pharma Storage Insights and Industry Landscape

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### Introduction:

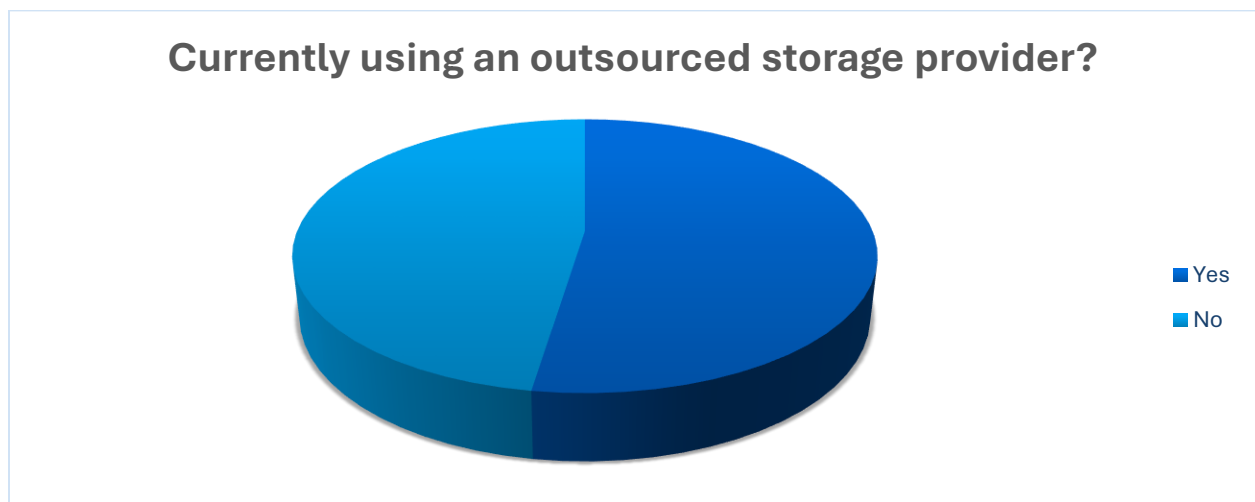
This paper analyzes the findings from a recent proprietary storage survey focusing on the pharmaceutical industry's storage needs and the factors influencing the selection of storage providers. The survey highlights key trends, preferences, and areas for improvement as identified by over 250 pharmaceutical industry professionals in Research & Development (R&D) and Corporate Management roles.

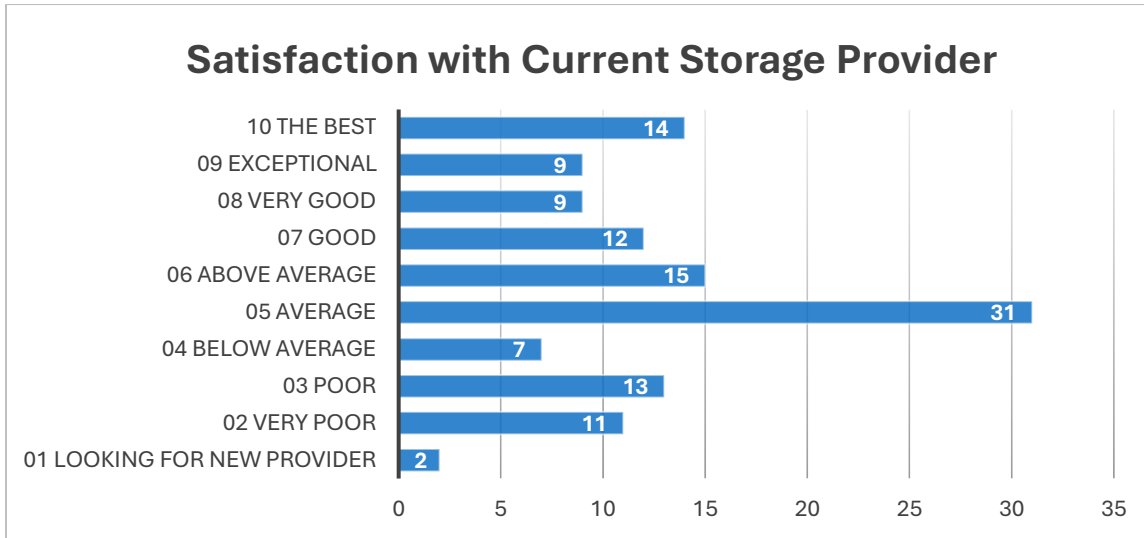
### Survey Demographics:

The majority of respondents were based in the United States, with 93% confirming their location there. The respondents primarily represented R&D and Corporate Management sectors, which identified key decision-makers as personnel in Quality/Regulatory, Corporate Management, and Manufacturing and Production. The data indicates that storage-related decisions are heavily influenced by these departments, emphasizing the critical role of compliance and operational efficiency in storage solutions.

### Current Use of Outsourced Providers:

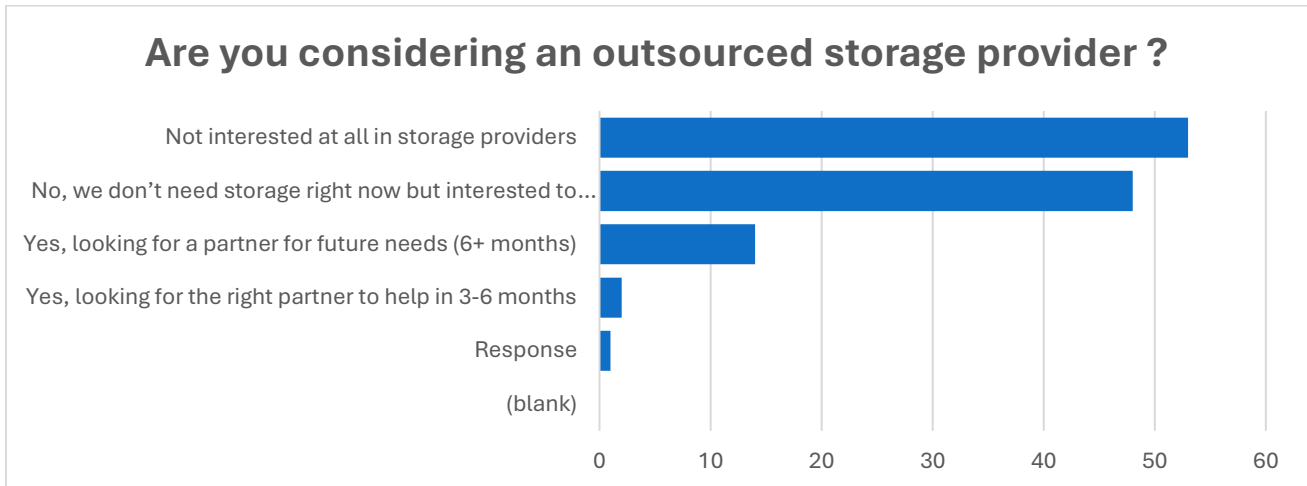
Respondents were evenly split between those who currently use an outsourced provider and those who do not. This division suggests that while outsourcing is a common practice, a significant portion of the industry still relies on in-house storage solutions or they are exploring options, but not currently using an outsourced storage provider. Most respondents rated their current storage providers as offering "Average" service quality, indicating general satisfaction but also highlighting room for improvement.





#### Interest in Storage Solutions:

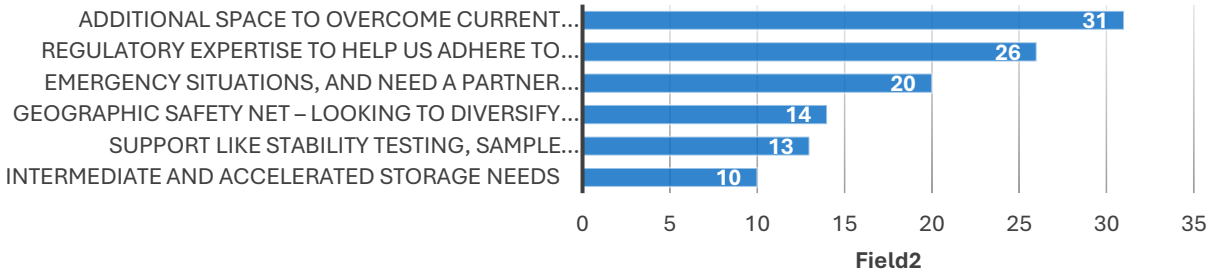
Notably, about half of the respondents expressed little to no interest in outsourced storage at present, with only 2% seeking an immediate solution within the next 3-6 months. This finding suggests that while there is interest in exploring storage options, the majority are either content with their current arrangements or are in the preliminary stages of considering alternatives.



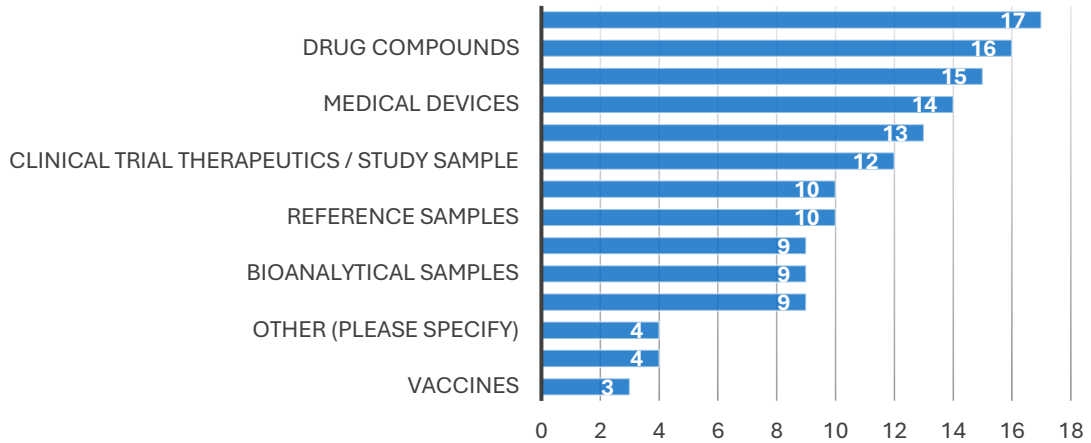
#### Storage Needs:

The most commonly cited needs for pharmaceutical storage included: additional space, regulatory expertise, and assistance with emergency situations. The diversity of needs is underscored by the range of products requiring storage, with Active Pharmaceutical Ingredients (APIs), drug compounds, and stability studies being the most frequently mentioned. Perhaps surprisingly, vaccines ranked low among current storage needs, which could be due to the specialized storage conditions they require, often handled by specialized facilities.

## What are you seeking from your next storage provider?

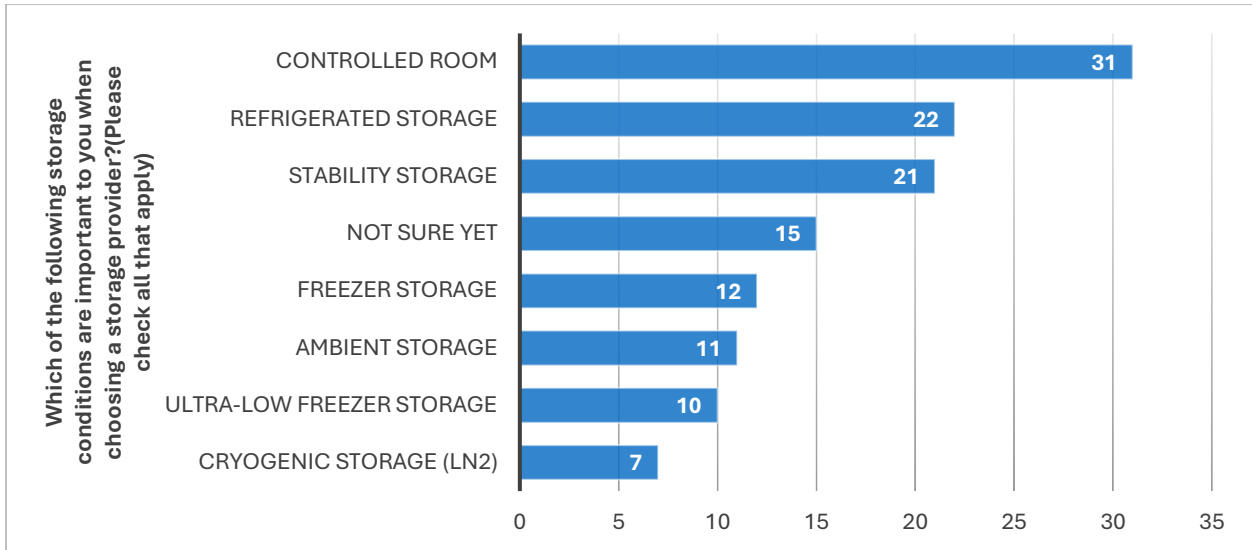


### What types of products would you consider storing with an outsourced provider?



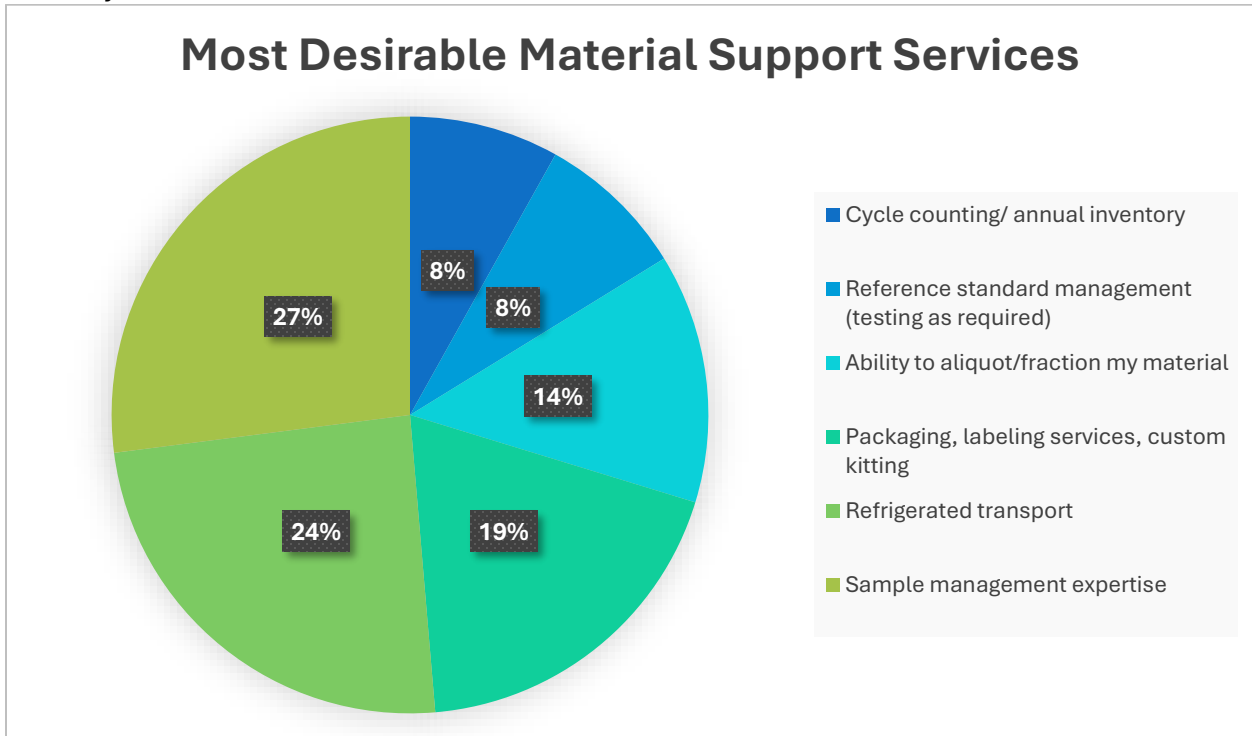
### Storage Conditions:

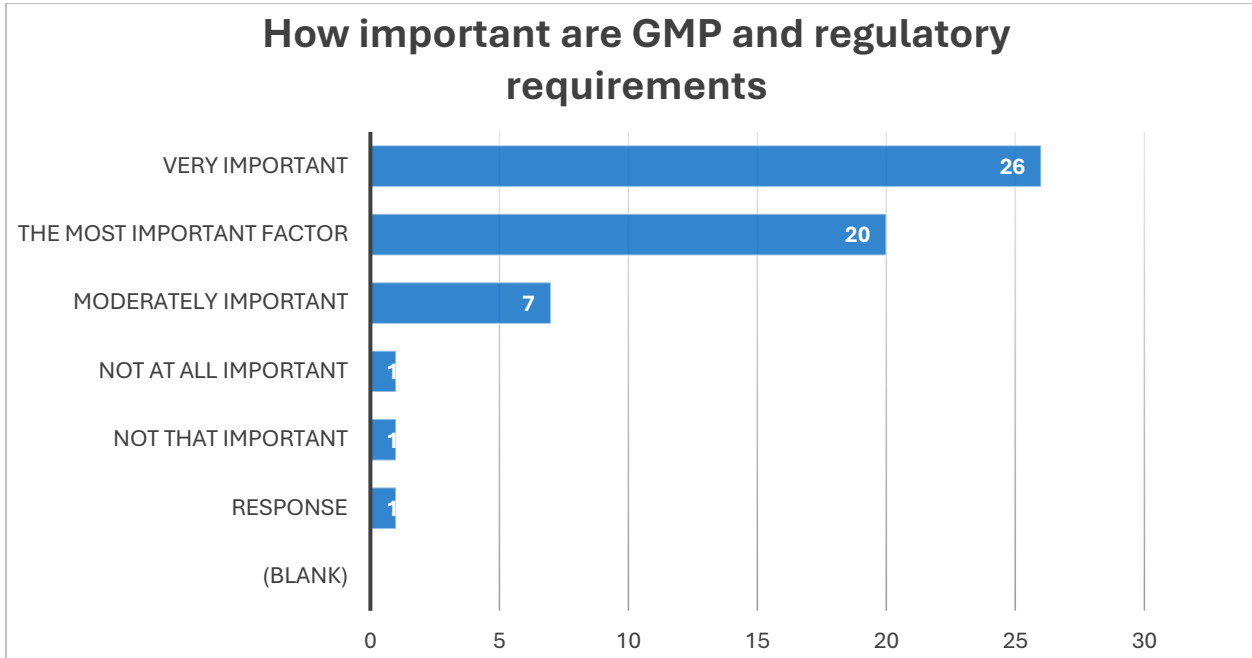
Controlled Room Temperature (CRT) storage emerged as the most important condition for respondents, followed by refrigerated storage and stability conditions. Cryogenic storage was of low interest, which aligns with the lower need for vaccine storage, as cryogenic conditions are often associated with vaccine preservation. A significant portion of respondents were unsure of their future storage needs, highlighting a potential area for storage providers to offer guidance and flexibility.



### Materials Management and Compliance:

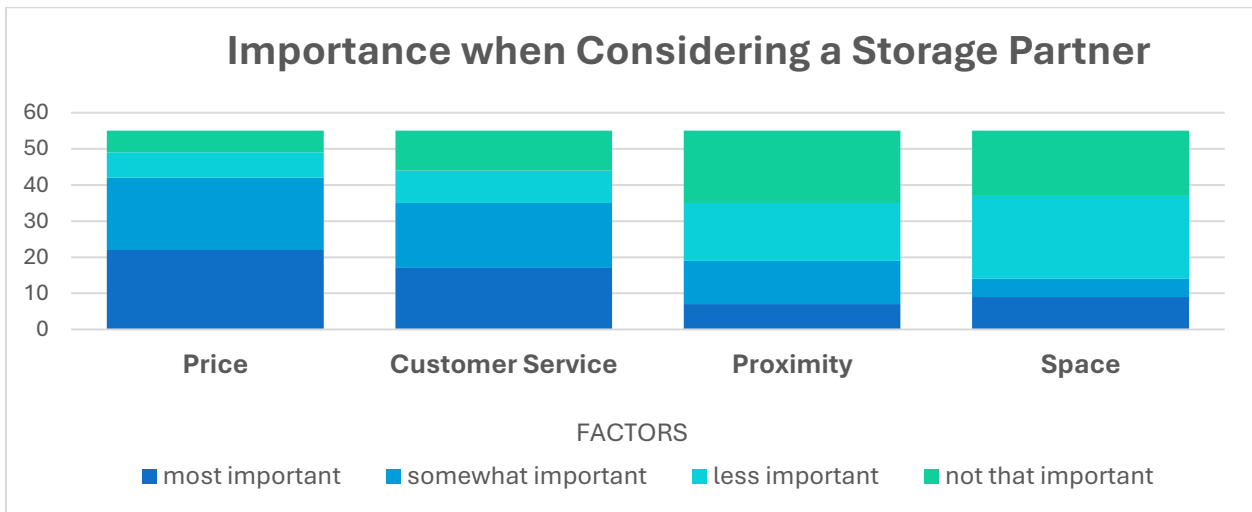
Sample management expertise and refrigerated transport were the top concerns in materials management, with packaging, labeling, and kitting also scoring high. Interestingly, cycle counting and reference standards management/testing were of the lowest importance. This indicates a preference for services that directly impact the integrity and traceability of stored materials. Compliance with cGMP (current Good Manufacturing Practice) and regulatory requirements was deemed crucial by nearly all respondents, reflecting the high stakes of regulatory adherence in the pharmaceutical industry.





#### Selection Criteria for Storage Partners:

When selecting a storage partner, respondents prioritized price and customer service above all else. While location and available space were also considered, they were of lesser importance. This suggests that while logistical factors matter, cost-effectiveness and reliable customer service are the primary drivers of decision-making in storage partnerships.



### **Desired Improvements in Storage Services:**

Respondents identified several areas for improvement in their current storage solutions:

1. **Communication and Responsiveness:** There is a strong demand across the board for better communication, including real-time updates and timely responses to issues such as temperature excursions.
2. **Monitoring and Control:** Enhanced monitoring capabilities, particularly real-time tracking of storage conditions and improved control over temperature and humidity, are highly desired.
3. **Capacity and Flexibility:** Increased storage capacity and operational flexibility, especially for handling high-volume needs, are critical concerns.
4. **Cost and Pricing:** Respondents are seeking lower costs, better pricing options, and more transparency in pricing changes.
5. **Customer Service:** There is a need for improved customer service, including live contact options and better support, particularly with material safety data sheets (MSDS).
6. **Operational Efficiency:** Faster turnaround times and more efficient processes are crucial to improving overall satisfaction with storage providers.
7. **Infrastructure and Accessibility:** Improved access to storage facilities, more convenient locations, and enhanced infrastructure are key areas for development.
8. **Compliance and Documentation:** There is a demand for better compliance documentation and adherence to regulatory requirements.
9. **Technology Integration:** Respondents expressed interest in integrating storage providers' systems with their own, particularly for temperature monitoring and digital reporting.

### **Conclusion:**

The findings from this unique survey provide unique insight into the pharmaceutical industry's current and future storage needs, highlighting both satisfaction and areas ripe for innovation. While the majority of respondents were currently content with their storage solutions, describing service quality as “average”, there is a clear and pressing demand for improvement in several key areas. The survey underscores the importance of price and customer service as the primary drivers in choosing a storage partner, revealing that while cost efficiency remains a top priority, the quality of service cannot be compromised. Furthermore, the industry’s growing complexity, with diverse products ranging from APIs to drug compounds and stability studies, calls for more specialized and flexible storage solutions.

Respondents expressed a need for enhanced communication, real-time monitoring, and operational flexibility, reflecting a desire for more proactive and responsive storage providers. The emphasis on compliance and regulatory adherence further highlights the high stakes involved in pharmaceutical storage, where even minor deviations can have



significant consequences on drug efficacy and patient safety. As the industry evolves, the role of technology integration, particularly in monitoring and data reporting, will become increasingly vital in maintaining the integrity and security of stored products.

The survey results also reveal a gap between current services and future needs, particularly in terms of storage capacity, infrastructure, and the ability to adapt to high-volume or emergency situations. Providers that can offer tailored, transparent, and technologically advanced solutions will be well-positioned to meet the evolving demands of the pharmaceutical industry.

In conclusion, the path forward for storage providers lies in addressing these multifaceted needs through innovation, improved communication, and a commitment to regulatory excellence. By doing so, providers can transform what is often seen as a logistical necessity into a strategic advantage, ensuring that they not only meet but exceed the expectations of their pharmaceutical partners. The industry's future hinges on its ability to adapt and innovate, making it imperative for storage providers to evolve alongside it, providing the robust, reliable, and responsive services that the modern pharmaceutical landscape demands.