

# Interview: Craig Wallace – General Manager UK and Ireland, Santen

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*Craig Wallace established the UK affiliate of Santen, the Japanese ophthalmology company, in 2014. Wallace describes the journey Santen has been on so far in the UK, as well as his ambitions to contribute to its goal of becoming a leading global ophthalmology company by 2020.*

**You set up Santen’s UK affiliate nearly four years ago, which makes it a newcomer to a very mature and competitive market. What has been your experience thus far?**

I joined Santen in October 2014 and was excited about the challenge of setting up a brand new pharmaceutical affiliate in the UK. Having worked for 26 years in the UK pharmaceutical industry, I know what it takes to succeed in this tough market place. But actually, even though tough, if you know how to do things the right way, great success is possible in the UK.

Building Santen’s reputation and trying to establish it as a leading ophthalmology company in the UK and trusted partner underpins the goal of establishing Santen as a leading ophthalmology company globally by 2020.

Therefore, we do not have a boring minute and have been very active since 2014. From day one, I went about setting up a supply chain, built a sales team, an office and back office team. I hired very talented people who could help me start to establish Santen’s presence in the UK. We started to build credibility with external customers—including research and educational partnerships with the Institute of Ophthalmology, which is closely associated with Moorfields Eye Hospital one of the biggest and most prestigious eye hospitals in the world, pursuing the mission to really put Santen on

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the map.

In just three years, we have already achieved quite a lot and are now present with 13 products in the UK and 11 products in Ireland. A number of these products were acquired in a large business development transaction, but several have been launched from the rich Santen pipeline. We had to do a lot of complex work simultaneously. Setting up the supply chain, completing the marketing authorisation transfers of the acquired products in the UK and Ireland and ensuring we could deliver to customers without any disruption. In parallel, we started launching innovative new products from Santen's pipeline. In the summer of 2015 alone, we transferred the authorisation of 11 products in the UK and 9 in Ireland, passed an MHRA GDP audit in order to gain our wholesale distribution authorisation and launched two new products in the space of four weeks. One of those products was a new glaucoma product, Taptiqom® building upon Santen's substantial glaucoma portfolio. The second product, Ikervis® is a breakthrough product that with the help of our EMEA market access team we guided through a positive NICE appraisal for the treatment of severe keratitis with dry eye disease. Given our size at the time, mastering all these projects at once was tough, but I had already built a small but very capable core team at Santen to make this happen.

**What have been some of your immediate priorities in the beginning of the establishment of the UK affiliate?**

One of the biggest challenges was setting up a new organisation whilst still needing to keep major projects progressing. For example advancing a NICE technology assessment whilst still in the early days of building a UK market access team. Multi-tasking, being agile and just grabbing the current priority and getting it done were all key. My industry experience and network of contacts were invaluable during those early days.

In three years, we've built a strong team through a lot of recruiting, strategic outsourcing and where needed, using a small number of expert consultants. We made the decision to work with a large well-known CSO to build our sales team not just in the UK but in several markets Santen was entering simultaneously. It was a deliberate decision, to outsource the sales force in the early stages of the company because we needed to move quickly to set up a very high quality key account management team. By partnering to put this in place, I could focus my time and energy on building the back office support team and hiring critical functions like medical, market access, marketing, finance and regulatory. A few years on, all of these are in place and we've hired a strong team from across the UK pharmaceutical industry, hiring key talents capable of working collaboratively to deliver the Santen goals. I am pleased with our results so far, sales growth of 21% CAGR over the last three years. Four new products launched (two in UK, two in Ireland) supported by one NICE and two SMC HTA approvals. So the fundamentals are in place and we are on the right track to deliver our longer-term aspiration.

[Featured\_in]

**What was the level of awareness of the Santen brand in the UK when you started, and how have you gone about enhancing it?**

In most of the UK, there was a very low awareness of Santen, except in some of the highly specialised tertiary centres like Moorfields Eye Hospital, where some of the experts had been to international meetings and engaged with Santen abroad. But outside of those very specialist units, in the rest of the UK, no one had heard of us. We responded to this situation with a combination of raising the corporate knowledge of the company by talking about our heritage, being a nearly 130-year-old company, and the fact that we were the leading ophthalmology company in Japan. Then suddenly people started listening. Santen is the oldest ethical ophthalmology company in the world,

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and some of its innovations originating in Japan are known for themselves, even though the link to Santen is not clear to all stakeholders in the UK. It also helped that in the summer of 2015 we were launching brand new innovative products, such as Ikervis® and Taptiqom®.

### **What are the main characteristics of the ophthalmology market in the UK?**

In the UK, Santen takes an interest in glaucoma, dry eye disease and, in the future, we will have some interesting products in retinal disease. Even though these are all within the ophthalmology market, they are quite different therapy areas in their characteristics. In the UK, there are fewer ophthalmologists per capita than in market size-comparable European countries, and the system in itself differs greatly as well. In Germany and France, you have office-based ophthalmologists where a member of the public can go directly by making an appointment. In the UK, if you have an ophthalmologic condition, your first port of call will either be the GP or you might go to an optician or a pharmacist. A patient will only see a specialist ophthalmologist if he or she is referred to one. Henceforth, self-medication is very common for some conditions like dry eye disease. The consequence is that it can take someone with a severe dry-eye condition anything up to two years to be referred to an ophthalmologist in the UK. Most GPs in the UK will have had only one week of ophthalmology training during their studies, and they have limited understanding of the more complex eye conditions.

If the self-medication does not show results, the patient will ultimately be referred into the hospital. Many GPs also systematically refer patients when unsure about an ophthalmologic condition, which means that many people are referred into hospitals that should not be. This adds to the overload in UK hospitals and leads to long waiting times before patients can receive optimum treatment.

The problem with delivery of eye care services in the UK is recognised within the NHS, but is difficult to fix as it requires a major re-design of the whole system. At Santen, we are passionate about seeing the system evolve and are actively seeking like-minded people in the NHS and working collaboratively with them to ensure patients get faster access to the appropriate treatments.

### **What can be Santen's role in alleviating this problem?**

In some parts of the UK, we are already collaborating with the NHS to begin the process of redesigning the system, striving to find ways to modify pathways. We aim to avoid referring to hospitals people with mild conditions, but therefore need GPs, optometrists and pharmacists to be more confident in assessing conditions. In the case of a severe dry eye disease, however, we need to work towards an accelerated pathway to the specialised ophthalmologist. This is exciting as these projects are transformative and clearly demonstrate our commitment to multiple stakeholders of improving eye health in the UK.

### **What is the significance of Santen's UK operations for the group globally?**

The UK market is the third largest ophthalmology market in Europe, so for that reason alone our operations in the UK will hold importance for the group. In addition to that, the UK has a multitude of reference bodies—Moorfields Eye Hospital is one of the biggest and most prestigious eye hospitals in the world and NICE is one of the most well-recognised HTA bodies globally influencing 39 different markets. The UK's science base is also composed of some of the top experts in the world, with some of the top universities, researchers and scientists working in Oxford, Cambridge and London, and their global influence has long been established.

The UK is actually the fifth largest market for Santen, despite us starting our operations here only three years ago. Our growth rate in the next few years should continue to be strong and well above industry average, as we continue to grow and innovate as a company: For example we have four

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new products to launch in the UK alone in the next 12 months.

The uptake of newer products in the UK is slower than in other EU countries, but we welcome the various measures the UK government are starting to try to change this like the accelerated access scheme. I hope that measures like this will further transform the NHS and make the UK one of the best places to be treated in the world. It is important that this happens not just for patients but also for our economy. We have a strong and vibrant life sciences sector in the UK and we need to look after and nurture "the jewel of the UK economy" as David Cameron once called our industry.

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### **How do you personally enjoy the Japanese corporate culture?**

Before I joined Santen, having worked in an American multinational for so many years, I was curious about the culture of a Japanese organisation. Like everyone, I had read that the Japanese culture was very different. And now that I live it, I love it. At Santen, I have been very fortunate to have been given a lot of accountability and responsibility. In the UK, we are in line with Santen's core values—customer centricity and putting patients first—but we are also able to implement Santen's strategy in the UK by giving it a British twist. We are a Japanese organisation, living the values of Santen, but strongly connected to UK, so that we can be relevant to our customers.

Japan and the UK have really strong connections, not just in terms of commerce, but also some interesting cultural connections. For example, when Japan left behind the period of the Samurai, and formed its first government, four of the key politicians that set up this first Japanese government including the first prime minister had studied together at UCL in London a few years earlier before returning to Japan to apply what they had learnt. Furthermore, I feel personally connected to Japan due to my parents living there a few years ago and, when the opportunity of this position came up, I was very eager to join and it has been even better than I thought it would be.

### **What are your ambitions for Santen in 2021?**

By then, we plan to be one of the leading ophthalmology companies in the UK, Europe and globally. We will have grown as an organisation and will have become a trusted partner of choice. The foundations for this are already in place. Now it is up to the Santen team and me to deliver. I expect a new wave of innovation. Across the total pharmaceutical sector in EMEA, there are an incredible 7,000 new products in development. Santen has a very exciting pipeline of ophthalmology products too. However, as an industry we have to figure out how to make sure this new wave of innovation gets to patients and is valued correctly by healthcare systems. It is an exciting future, it's coming fast and at Santen we want to be at the forefront of making this happen in Ophthalmology.

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