Key Trends Shaping Life Sciences

› Learnings from the 2026 World Economic Forum Annual Meeting

Davos | Q1 2026

Porsche Consulting

First-hand insights from talks and panel discussions with thought leaders and C-level executives

Porsche Consulting brought together executives and experts to discuss “Shaping Global Well-Being Through Technology” and to explore a central question for the industry: where will competition intensify, and where will collaboration be essential?

Porsche Consulting @ WEF Annual Meeting 2026







DAVOS IMPRESSIONS

Source: Porsche Consulting

The top 10 trends set to reshape life sciences – stakeholders need to adapt to stay competitive

01

Health emerges as strategic infrastructure

02

Prioritize early prevention and detection

03

AI becomes operating layer of health care

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Workforce shortages constrain innovation growth

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Supply chain becomes more fragmented and regional

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Innovation demands scalability and affordability

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Markets diverge into multi-speed adopters

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Access to health emerges as core strategy

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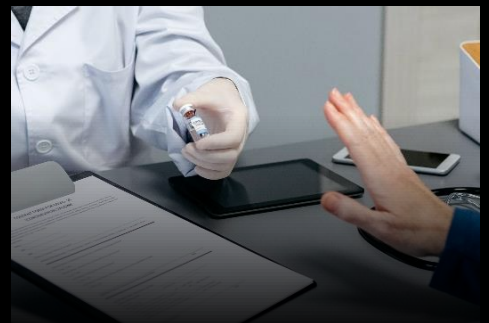

Biotechnology politicization requires communication

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Climate and sustainability reshape life sciences

Source: Porsche Consulting; Pictures licensed from AdobeStock

01 | Health becomes strategic infrastructure

DESCRIPTION

Governments increasingly regard healthcare as a critical sovereign infrastructure, essential to national competitiveness, resilience, and geopolitical strategy.

RATIONALE

- Germany, China, the US, and UAE build **health sovereignty** into their **national security** plans.
- **Health system strength** is **linked** with economic power as a foundation for national competitiveness and resilience.
- Countries are **reshoring critical production capacities** to reduce dependencies and secure supply of essential health goods.
- **CEOs** are increasingly **acting as geopolitical negotiators** engaging directly with governments on strategic health priorities.

IMPLICATIONS FOR LIFE SCIENCES

- **Companies** should **position** themselves **as partners** in **establishing health sovereignty** and economic growth.
- **Direct negotiations with governments** on **pricing**, **supply**, **trials**, and **investments**, including industrial policies like local manufacturing, stockpiling, and innovation incentives.
- Create **country-specific partnerships aligned with national health plans**, focusing on value-based access.
- **Reconfigure footprint** and **sourcing** as **strategic levers** to match emerging industrial policy, incentives, and stockpiling agendas.

In today's world, investing in health must be a central pillar of national competitiveness and sovereignty – much like energy, technology or defence.[1]

Michel Demaré
Chair of the Board
Astra Zeneca

Source: Porsche Consulting; 1. World Economic Forum (13 Jan 2026), "We live in a golden age of medical science, but is the policy ready?"

02 | Prioritize early prevention and detection

DESCRIPTION

Global leaders have reached a clear consensus: prevention is the sole sustainable approach to address aging populations, the increasing burden of non-communicable diseases (NCDs), and decreasing productivity.

RATIONALE

- **Late-stage care** costs are heavily **burdening healthcare systems** and are increasingly viewed as unsustainable.
- Around **80%** of **NCDs*** can be **prevented** with **effective screening** and targeted prevention measures.
- **Economic benefits of early detection** expected to exceed **$1 trillion by 2030** driven by avoided treatment costs and improved productivity.
- Canada: **proactive care** of COPD** **cut hospitalizations** significantly with reported reductions of **up to ~72%.**

IMPLICATIONS FOR LIFE SCIENCES

- Prioritize **developing pre-disease indications, molecular screening**, and **early biomarkers.**
- Develop **prevention-focused business models** with payers and partnerships for long-term health.
- Leverage **digital and AI** tools to **combine prevention** and **prediction** across screening, monitoring, and risk stratification.
- **Strengthen evidence generation** for prevention and early detection incl. **real-world evidence** and outcomes data to support payer adoption and reimbursement.

Between 2011 and 2030, the world will spend more than $30 trillion tackling NCDs*. Instead of incurring the expenses, we could be preventing them and investing that money more in prevention.[1]

Mosa Moshabela
Professor of Public Health
University of Cape Town

*Non-communicable diseases | **Chronic Obstructive Pulmonary Disease
Source: Porsche Consulting; 1. World Economic Forum (22 Jan 2026), "Taking NCDs Seriously"

03 | AI becomes the operating layer of ealthcare

DESCRIPTION

AI is evolving to full integration in clinical workflows, manufacturing, and health operations. Its most immediate effect will likely improve primary care, particularly in regions facing healthcare professional shortages.

RATIONALE

- AI **enhances staff efficiency** for **diagnostics**, **risk prediction**, **scheduling**, and **documentation.**
- Within a cooperation, Open AI invested **$50 million** with the Gates Foundation to **introduce AI copilots** in **1,000 African clinics** targeting primary care capacity in settings with major workforce shortages.
- AI is moving from "tools" to **workflow-level integration** (agentic, multi-step execution) enabling **end-to-end support** across care delivery and operations.
- To note: Scaling AI in healthcare requires **connected data**, **interoperable standards**, and **smart regulation**.

IMPLICATIONS FOR LIFE SCIENCES

- Develop **AI-driven therapeutics** combining algorithms and medicine for primary care.
- Use AI to **enhance clinical trial recruitment**, **safety**, and **protocols** through **automation**, **risk prediction**, and **smarter operations**.
- Coordinate launch plans with **AI-based care pathways** to drive **adoption in real-world settings** and **reduce clinician burden.**
- Build **connected data foundations** to scale AI across systems incl. **interoperability**, shared standards, and fit-for-purpose architecture.

AI gives us the chance to reimagine the future of healthcare. As foundation models and agentic systems advance, they will help shape digitally empowered healthcare ecosystems with broader access, sustainable economics, and better outcomes.[1]

Michael Sen
CEO of Fresenius

Source: Porsche Consulting; 1. World Economic Forum (14 Jan 2026), "Reimagining healthcare: how to increase care without increasing costs"

04 | Workforce shortages constrain innovation growth

DESCRIPTION

Constraints in healthcare and manufacturing are primarily associated with scarcity of skilled professionals such as engineers and health personnel, which impedes innovation more significantly than infrastructure limitations.

RATIONALE

- Healthcare **demand keeps rising,** while supply of products & services is constrained by workforce gaps
- **Engineers, skilled clinical** and **manufacturing workers** are projected to be have a **shortfall of millions by 2030** and **not evenly distributed across regions.**
- **Administrative work** accounts for **30%** of frontline capacity with clinicians spending hours per day on paperwork.
- In another vein, **reshoring** is also **limited** by a **lack of skilled talent**, causing unfilled technical roles and slowing efforts to modernize critical infrastructure.

IMPLICATIONS FOR LIFE SCIENCES

- Use **automation**, **digital twins**, and **AI** for **quality control** in manufacturing to increase throughput and **reduce dependency** on scarce specialist roles.
- Create products that **reduce clinician workload** by cutting documentation and administrative burden in care delivery.
- Apply **workforce-efficient designs** in trials, processes, and launches incl. simpler protocols, remote/hybrid models, and smarter monitoring.
- Build **reskilling and capability-building** into transformation roadmaps to **ensure adoption of automation and AI at scale**.

In Rwanda, the government is using AI to support plans to quadruple the healthcare workforce within four years. With limited natural resources ... technology becomes a natural go to and not an afterthought.[1]

Paula Ingabire
Minister of ICT and Innovation
Rwanda

Source: Porsche Consulting; 1. World Economic Forum (30 Jan 2026), "We asked leaders at Davos 2026, how can we better invest in people? Here's what they said"

05 | Supply chains become more fragmented and regional

DESCRIPTION

While localization is politically favored and often demanded, it presents economic and operational difficulties due to rising costs and talent scarcity.

RATIONALE

- **Geopolitical tensions** are **splitting supply chains into** separate **blocs** like the U.S., China, EU, India, and GCC*.
- **Globalization** is frequently perceived as a **zero-sum scenario** accelerating protectionism and strategic industrial policy.
- **Local production** is **politically required** and mandated for large tenders, market access, or license-to-operate.
- Supply chains have entered an era of **structural volatility** shifting executive **focus from efficiency to a complex combination of resilience and agility**.

IMPLICATIONS FOR LIFE SCIENCES

- Use a **hub-and-spoke approach** for **regional manufacturing** rather than building full facilities.
- Focus on **redundancy**, **diversify suppliers**, and **explore reshoring strategies** to reduce concentration risk and improve continuity of supply.
- Invest in **automation** and **digital twin** tech to address labor shortages and offset higher costs in regionalized production setups.
- Build **"trade-and-tariff readiness"** into supply and pricing strategies, in cooperation with Corp. Affairs, to **manage sudden policy shifts** and cross-border friction.

Supply chain disruption in 2026 will be constant and structural. Geopolitical fragmentation, shifting trade rules and labour shortages are all redefining how value is created and moved.[1]

Per Kristian Hong
Senior Fellow of the Global Business Policy Council

*Gulf Cooperation Council
Source: Porsche Consulting; 1. World Economic Forum (19 Jan 2026), "Global Supply Chains Enter Era of Structural Volatility, World Economic Forum Report Finds"

06 | Innovation demands scalability and affordability

DESCRIPTION

Scientific breakthroughs by themselves are not enough. Successful innovations are those that can be scaled, receive reimbursement, and seamlessly integrate into existing workflows.

RATIONALE

- Drugs introduced in the US face a **40% failure rate** and delays up to two years in **Europe.**
- **China leads** in advanced **therapy trials**, **production**, and **cost efficiency** reinforcing a competitiveness gap in cutting-edge modalities.
- **Sustainable delivery systems** are **crucial** for RNA, CRISPR*, and cell therapies and often become the limiting factor for real-world scale-up.
- **Affordability and capacity constraints** push innovation toward "operational fit" incl. reimbursement readiness and seamless workflow integration.

IMPLICATIONS FOR LIFE SCIENCES

- Focus on **platform-based R&D** (e.g., RNA, gene editing, ADCs, radioligands)to enable repeatability, speed, and scale across indications.
- **Consider manufacturability** from the start of pipeline planning incl. scalable processes, supply strategy, and delivery/logistics constraints.
- Highlight **value** beyond efficacy by emphasizing **system-wide advantages.**
- Build **delivery ecosystems** early (providers, sites, diagnostics, logistics)to ensure "workflow-ready" adoption at launch, not just approval.

The challenge is that you have to translate science and evidence into policy and then policy into pilots and then pilots into scalable delivery.[1]

Sania Nishtar
CEO Gavi, the Vaccine Alliance

*Clustered Regularly Interspaced Short Palindromic Repeats
Source: Porsche Consulting; 1. Euronews (25 Jan 2026), "Women lose 75 million years of healthy life annually – yet receive only 6% of health funding"

07 | Markets diverge into multi-speed adopters

DESCRIPTION

Countries divide into early adopters, late adopters, and leapfroggers, each necessitating tailored strategic approaches driven by differences in regulation, investment capacity, talent, and digital infrastructure.

RATIONALE

- The **US** and **China** are **rapidly advancing** in **AI**, **RNA research**, and **gene therapy**
- **Europe** faces challenges due to **regulatory delays** and **political divisions** slowing diffusion and scale-up of innovation across markets.
- The **GCC*** is emerging as a **growing innovation center** driven by major investments in **AI-ready infrastructure** and tech ambition.
- **Africa** is making progress by **adopting AI-driven primary healthcare** solutions

IMPLICATIONS FOR LIFE SCIENCES

- Develop **modular offerings**, **pricing** structures, and **trial options** that can be reconfigured by market maturity and policy constraints.
- **Tailor approaches by region**:
  - Prioritize innovation in rapidly expanding markets (US, China, GCC)
  - EU and HEOR** in established markets (EU)
  - Implement digital-first strategies in emerging leapfrog markets (Africa, India)
- **CEOs** will take charge of **localized negotiations** that are politically intricate

I don't think we'll go back to where we were. If I was running a country, I'd be trying to strengthen myself and my region... and then building resilience.[1]

Ngozi Okonjo-Iweala
Director-General
World Trade Organization

*Gulf Cooperation Council | **Health Economics and Outcomes Research
Source: Porsche Consulting; 1. Reuters (23 Jan 2026), "World order changing, not rupturing, finance chiefs say"

08 | Access to health emerges as core strategy

DESCRIPTION

The gap in healthcare access is expanding, making fair and inclusive models crucial for sustainable development, social stability, and credibility of health systems.

RATIONALE

- In 2022, **~1.1 million EU deaths could have been prevented** with stronger health and medical interventions, incl. access to innovative medicines.
- Many **people worldwide still lack access to early prevention and screening** limiting timely diagnosis and increasing avoidable disease burden.
- Health equity is increasingly framed as **"system performance"**, not an add-on with **fairness positioned as central to sustainable healthcare transformation**.
- **Financing gaps** and **high inefficiency** constrain access to essential services especially in primary care and prevention in lower-income settings.

IMPLICATIONS FOR LIFE SCIENCES

- **Collaborate with governments** on primary care and screening to turn proven pilots into scalable programs.
- Create **decentralized, low-impact treatments** for primary care designed for constrained settings and simpler delivery models.
- **Expand tiered pricing** and subscription models to improve affordability while sustaining innovation at scale.
- Include **access metrics** in **product strategies** and track real-world reach (not only clinical outcomes).

Healthier food today and the plate that is recommended by health organisations might be more expensive, might not be available to many in the world, might even take a longer time to cook. And in that case, it is not as accessible to everyone.[1]

Johan Westman
CEO AKK AB

Source: Porsche Consulting; 1. Euronews (26 Jan 2026), "Has the golden age of global health ended? The health takeaways from Davos 2026"

09 | Biotechnology politicization requires communication

DESCRIPTION

Fundamental scientific platforms such as RNA technology, gene editing, and AI-based diagnostics are encountering increasing political and regulatory challenges, which are affecting their overall viability.

RATIONALE

- More than **400 RNA-based therapies** are **in development** with **strong scientific basis**.
- Politics increasingly **influence funding, trials, and market access** as fragmentation and competition shape technology priorities and decision-making.
- **RNA research** is impacted by **political debate** and **misinformation**, e.g., U.S. government canceled $500 million in mRNA contracts.
- **Policy and governance readiness** is becoming a limiting factor for medical innovation affecting how quickly breakthroughs can translate into access at scale.

IMPLICATIONS FOR LIFE SCIENCES

- Lead efforts to produce **real-world evidence** and **comprehensive long-term safety** data to strengthen trust and reduce room for politicized narratives.
- Enhance **science diplomacy** and **improve regulatory cooperation** to enable responsible adoption of frontier platforms across markets.
- Create strategies to **manage** and **minimize platform-related risks** incl. governance, bioethics, and clear "what we will/won't do" guardrails.
- **Proactively communicate benefits**, limits, and safeguards to build public confidence using consistent narratives across stakeholders.

This is not a new-fangled invention to be frightened of. These are proven technologies built through science over the course of six decades, and they have the potential to save millions of lives.[1]

Thomas Robert Cech
Nobel Laureate

Source: Porsche Consulting; 1. University of Colorado Boulder Today (20 Jan 2026), "Tom Cech at Davos: RNA research still a big deal"

10 | Climate and sustainability reshape life sciences

DESCRIPTION

Environmental, social, and governance (ESG) factors, along with climate concerns, are still influencing supply chains, investment decisions, industrial motivations, and risk management practices, often in subtle ways.

RATIONALE

- Climate shocks **disrupt supply chains** and **production** increasing operational continuity risks across the value chain.
- **Climate-related diseases** link planetary and human health adding structural pressure to prevention, preparedness, and health systems.
- ESG criteria are **central to EU policies** and sustainability is becoming a **competitive edge in Europe**
- Calls grow to **decarbonize pharmaceutical supply chains** as emissions and resilience become strategic priorities.

IMPLICATIONS FOR LIFE SCIENCES

- Incorporate sustainability into **biomanufacturing**, **supply chains**, and **product design** including decarbonization pathways without compromising quality.
- Proactively **address ESG considerations** in negotiations, funding, and diplomacy as partnerships and incentives increasingly include sustainability conditions.
- **Europe** can establish itself as a **leader for sustainable biopharmaceuticals** by enabling scale and speed through fit-for-purpose standards and regulation.

The transition to a more sustainable economy is not only about the climate, it's about growth, it's about prosperity, and it's about resilience – because those solutions are already competitive.[1]

Ester Baiget
President & CEO of Novonesis

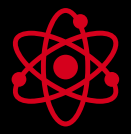
Source: Porsche Consulting; 1. World Economic Forum (30 Jan 2026), "We asked leaders at Davos 2026, how can we build prosperity within planetary boundaries? Here's what they said"

We cannot look at trends in isolation, so we elucidate their interdependencies within 4 “battlegrounds”

Trade & Policy (T)

Market entry & competition is transactional, volatile, & tied to pricing drops & geopolitics.

Health depends on open access to innovation, but mechanisms are being reshaped by protectionism & nationalism.



Innovation (I)

Innovation is being redefined as real speed, affordability & scale, not just novelty.

The more advanced the science becomes, the less likely it is to be commercially viable.

Operations (O)

Local production desired, but talent gaps, cost inflation, & compliance make it difficult.

The political imperative to localize production is colliding with the economic & tech feasibility of doing so at scale.

Competition (C)

Western isolation strategies clash with China’s growing prowess across the value chain.

The West wants to block its primary competitor, but is reliant in parallel, as it is also our most essential collaborator.

Source: Porsche Consulting

Noting our battlegrounds, what should Life Science companies do to win? Follow these 6 imperatives:

Align with National Health Agendas

Collaborate strategically with governments by aligning resources and partnerships to support national goals in health security, resilience, and economic growth.

Incorporate Prevention as Key Strategy

Incorporate early detection, risk evaluation, screening, and prevention into treatment and business strategies to address the disease at its initial stages.

Go AI-Native Across Entire Value Chain

Use AI as the core system in design, trials, manufacturing, and sales to speed development, improve data, and support collaboration with AI-driven health systems.

Prepare for Workforce Shortages

Develop therapies, trials, facilities, and services to run efficiently with fewer staff by focusing on automation, simplified delivery, and straightforward workflows.

Adapt to Multi-Speed Global Markets

Tailor regulatory, pricing, evidence, and partnership approaches to regional adoption speeds, applying different market strategies for fast, slow, and leapfrogging regions.

Innovate with Scale that Pays Off

Focus on manufacturable, cost-effective platforms that align with new care models to ensure scientific advances achieve lasting, practical impact.

Successful Life Science companies will be those that align with sovereign health priorities, prioritize prevention, fully integrate AI, address workforce shortages, navigate diverse market dynamics, and develop scalable, impactful innovations.

Source: Porsche Consulting

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Source: Porsche Consulting

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