



# Swiss Biotech Report 2021

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April 20, 2021

# Steering Committee Swiss Biotech Report 2021



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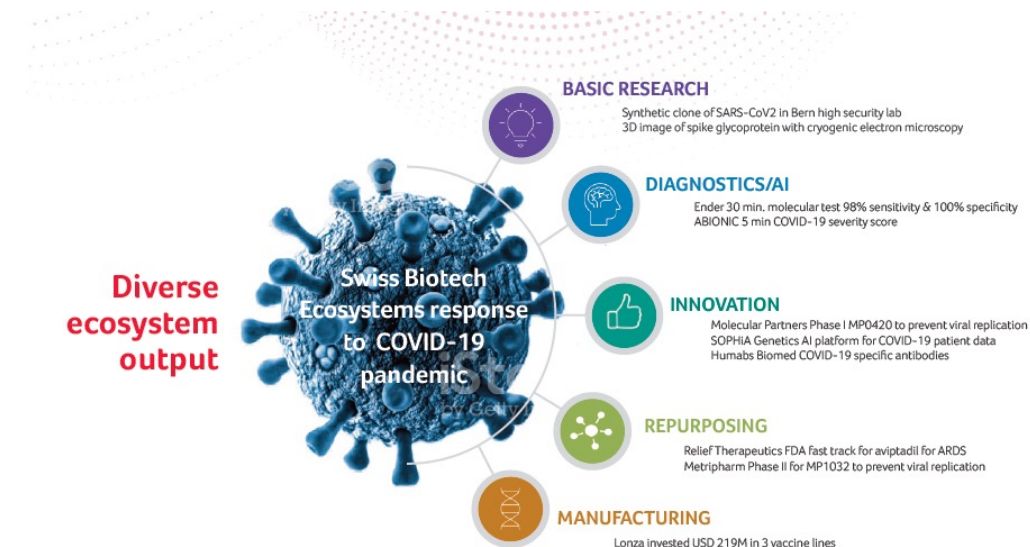
## 2020 best year ever for financing & innovation

- Capital investments in Swiss biotech companies almost tripled from 2019 to 2020 to CHF 3.4B (USD 3.7B)
- R&D investments increased 10% to CHF 2.2B (USD 2.3B)
- The number of employees in Swiss R&D biotech companies increased by 8% to 16,300
- High quality patent output helped maintain Switzerland's top ranking in Global Innovation Index for the tenth consecutive year



# Swiss biotech ecosystem response to COVID-19

Thriving ecosystem delivers innovation swiftly



- Synthetic COVID-19 virus reproduced by the University of Berne within **1 month** of genetic sequence made public
- SOPHiA GENETICS AI platform predicts COVID-19 evolution for >1,000 hospitals just **4 months** after pandemic declared
- Lonza sets up Moderna RNA vaccine production lines **in just 8 months**
- Molecular Partners and Humabs Biomed initiate Covid-19 specific therapeutics development programs



# Swiss biotech ecosystem response to COVID-19

## SNSF and public/private partnerships quickly engaged

### **Swiss National Science Foundation (SNSF):**

- Ready to react based on experience and established technologies (cloning, 3D structure determination, therapeutic target identification)
- Special research call on coronaviruses in March 2020 (45 projects, CHF 12 M)
- National Research Program Covid-19 in April 2020 (28 projects, CHF 20 M)

### **Innosuisse & biotechnet:**

- biotechnet Switzerland initiated a wide range of public/private partnership projects to address the challenges of the Covid-19 pandemic (diagnostics, antibacterial textile treatment, patient monitoring)
- Innosuisse initiated the “Innovation Power Switzerland” program to foster additional public/private partnerships in January 2021

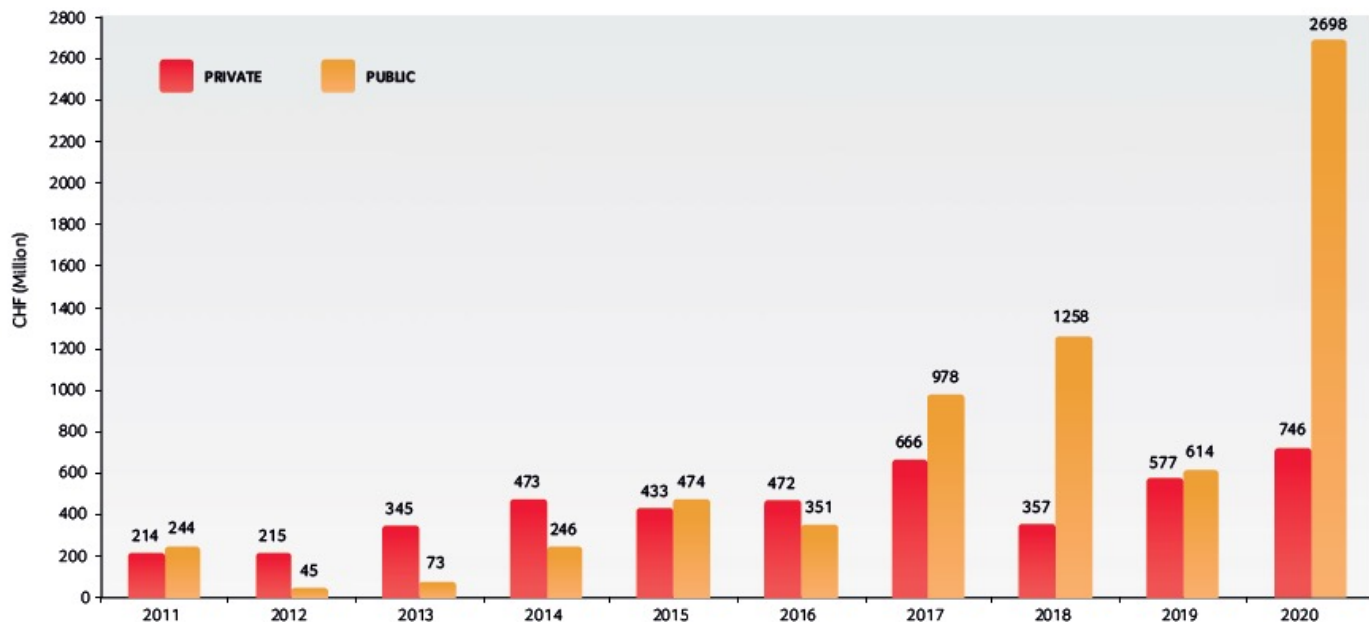


# The year in figures

The 2020 data in the presented tables is based on information that was available up until April 16, 2021, when this report was compiled and went to press. At this time, some of the companies had not yet disclosed their financial figures for 2020. Therefore, some figures were carefully extrapolated on the basis of the latest interim data publicly available (i.e., Q3 or Q4 2020)

# Capital investment in Swiss biotech companies 2011 -2020

## Private and public Swiss biotech companies



Source: EY (Capital investments include convertible bonds)

# Swiss biotechs raised a total of CHF 3.4B, up from CHF 1.2B

## Largest public and private rounds

### 2020 public rounds

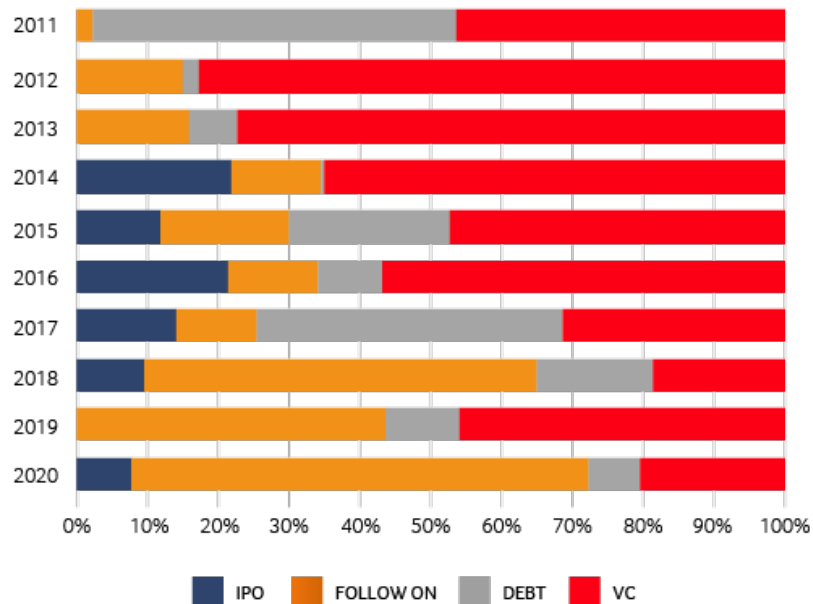
COMPANY	CHF MILLION
CRISPR Therapeutics AG	940
Idorsia	866
ADC Therapeutics	470
Basilea	125
Molecular Partners	80
<b>Total</b>	<b>2,481</b>

### Major 2020 private transactions

COMPANY	CHF MILLION
VectivBio Holding AG	135
SOPHiA Genetics	100
Noema Pharma	54
<b>Total</b>	<b>289</b>

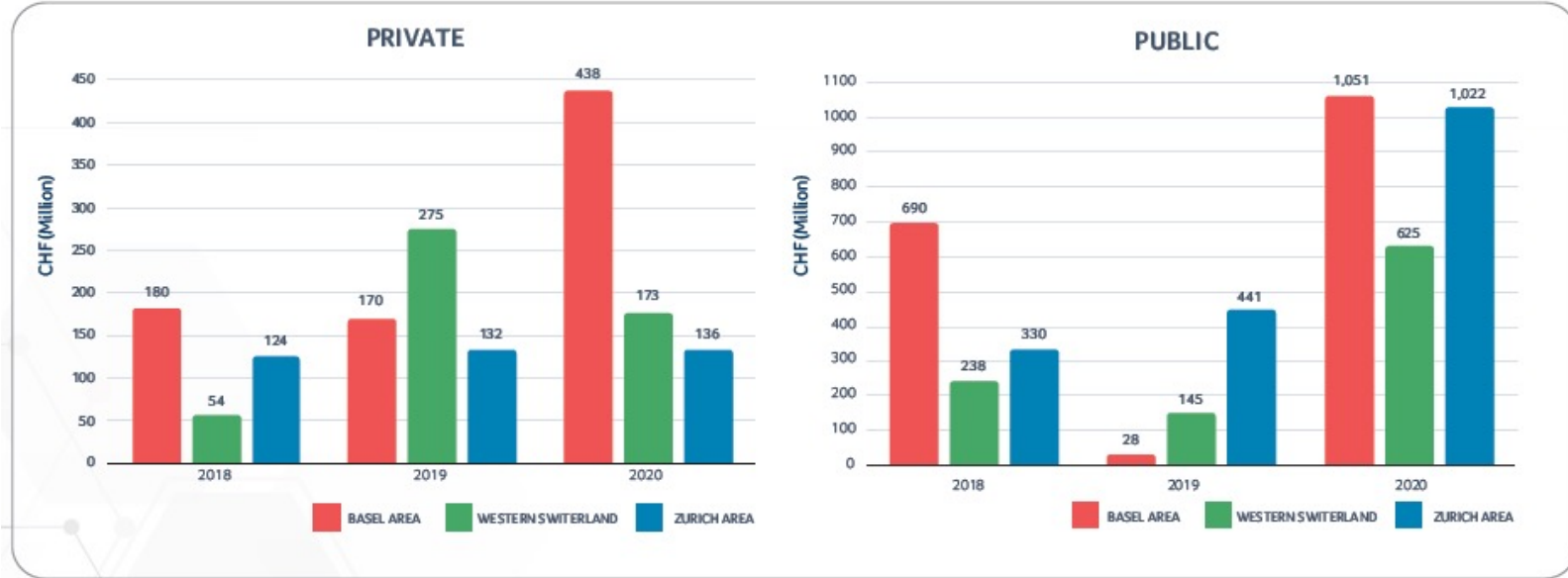


# Biotech financing categories in Switzerland 2011 to 2020



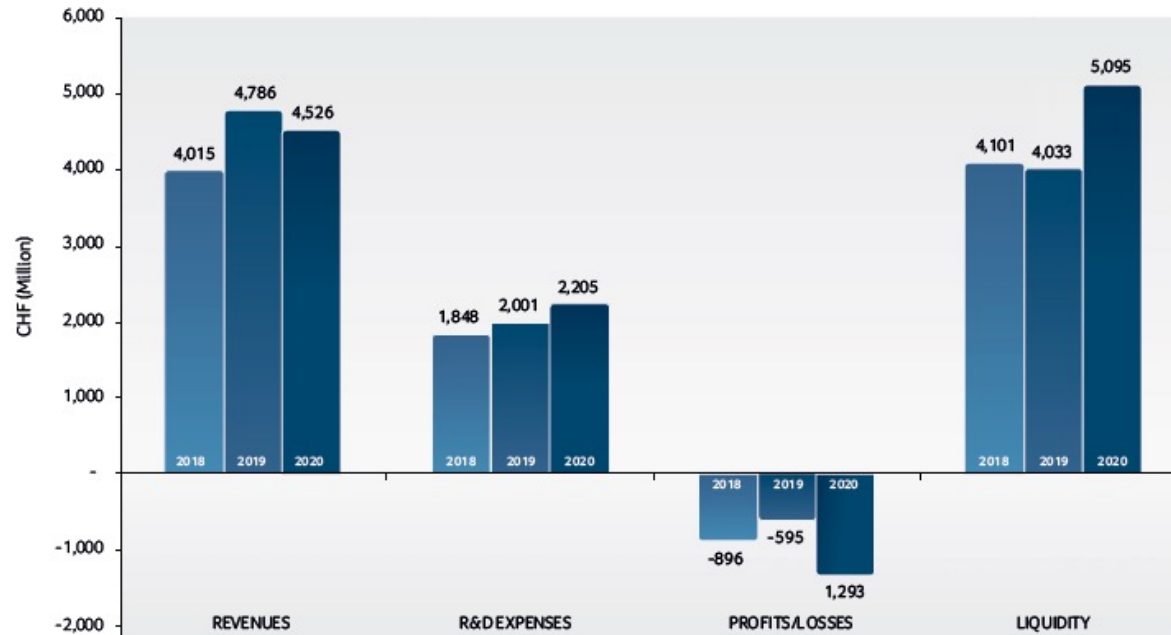
Follow on rounds increased from 43% in 2019 to 64% of financing in 2020

# Public and Private Swiss Regional Financing 2018-2020



# Revenues, R&D expenses, profit/loss, liquidity 2018-2020

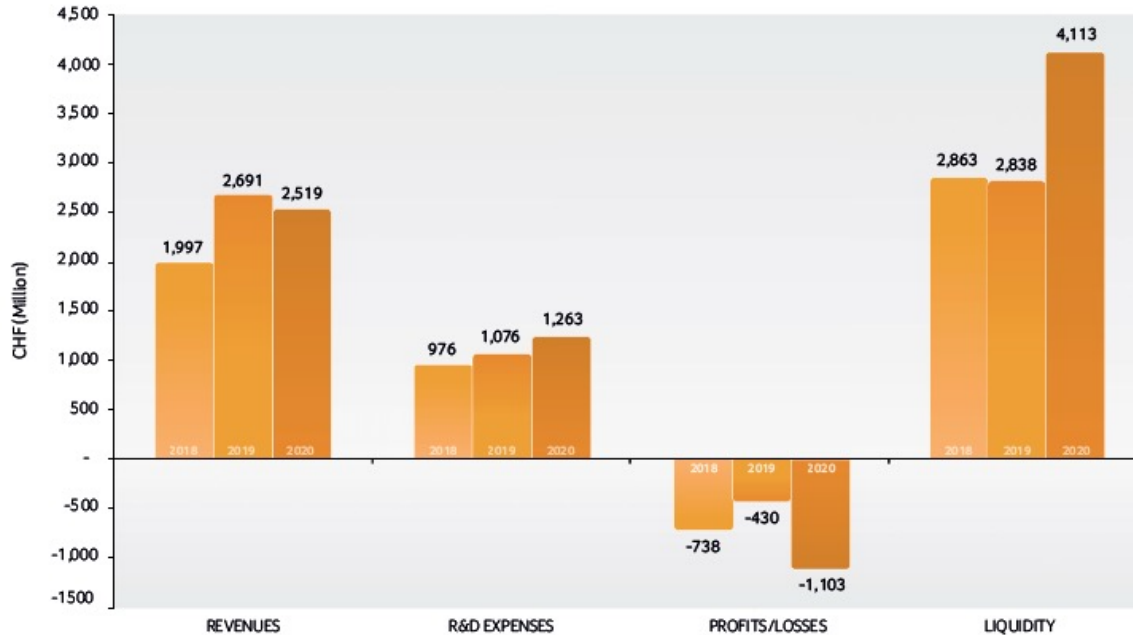
## Total Swiss biotech companies



Source: Annual Reports, website information and EY

# Revenues, R&D expenses, profit/loss, liquidity 2018-2020

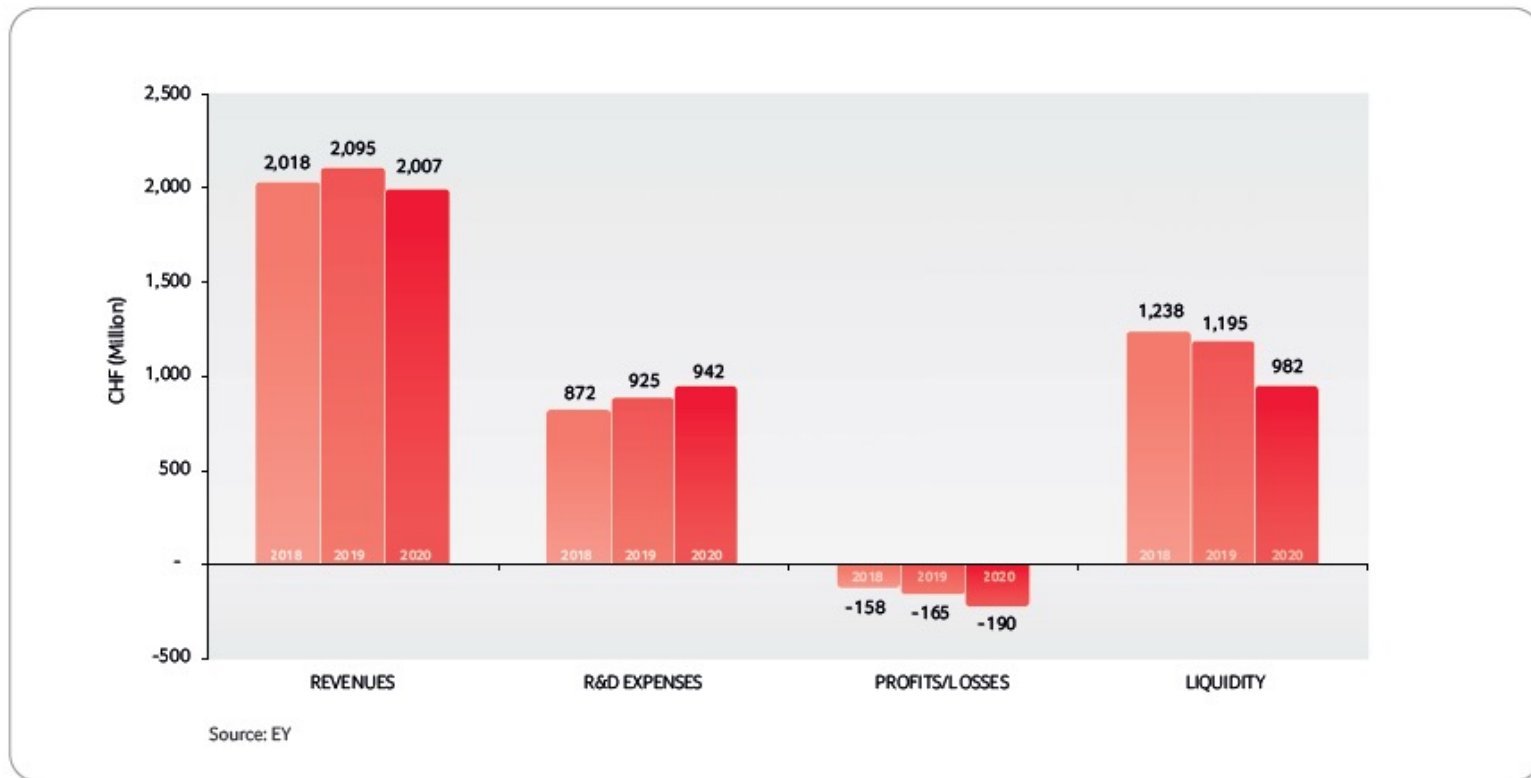
## Public Swiss biotech companies



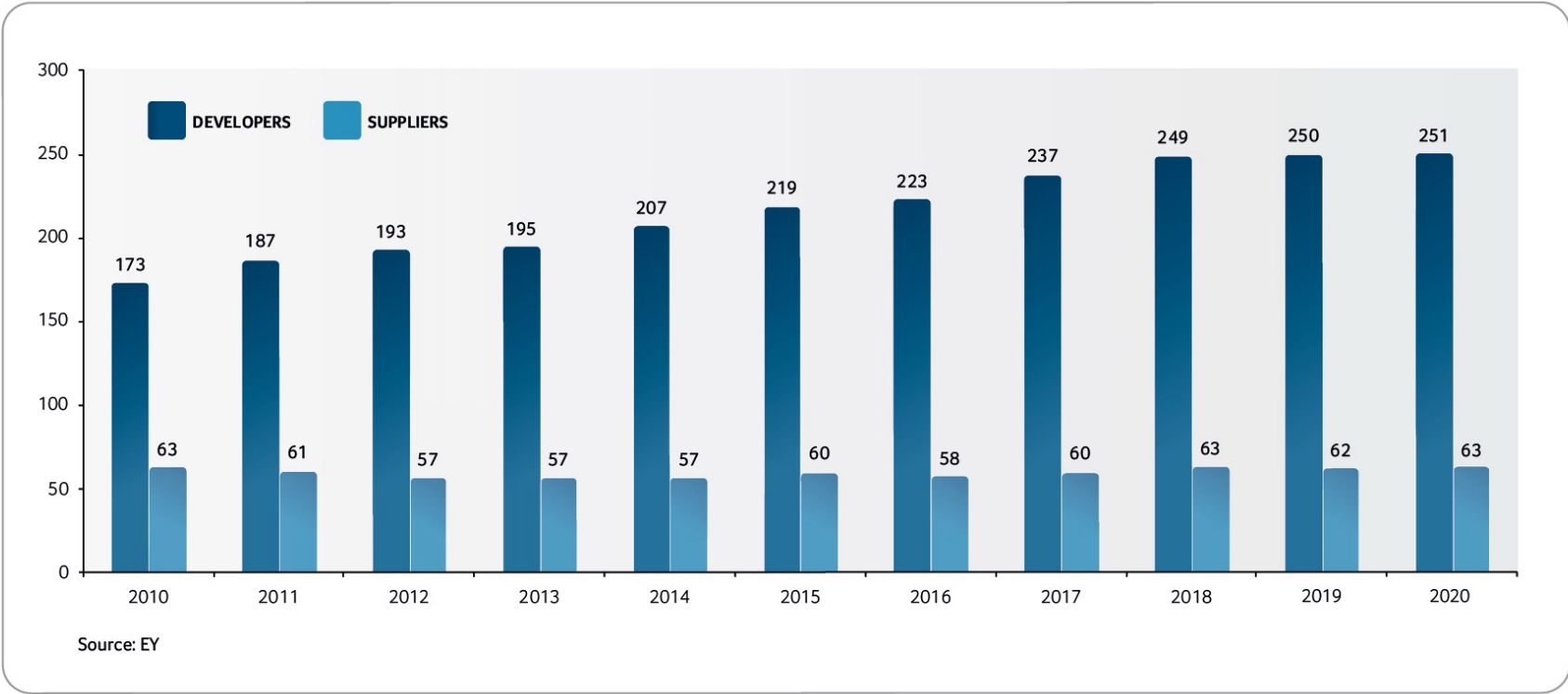
Source: Annual Reports, website information and EY

# Revenues, R&D expenses, profit/loss, liquidity 2018-2020

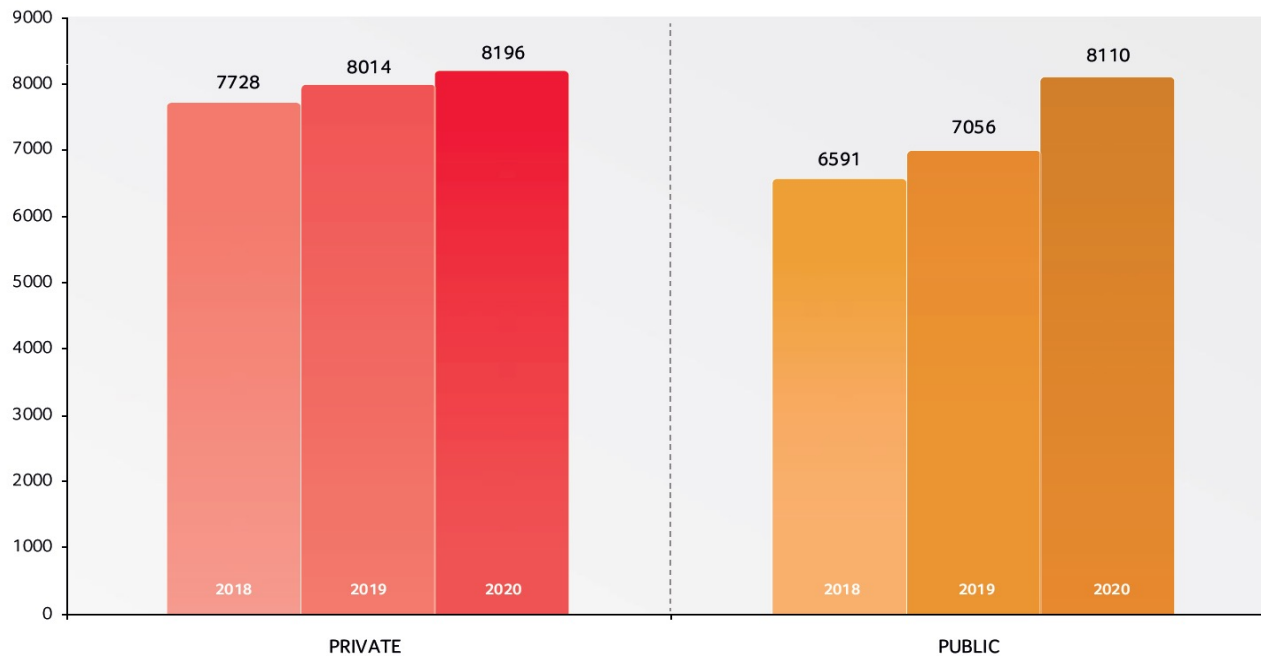
## Private Swiss biotech companies



# Number of biotech companies in Switzerland 2010-2020



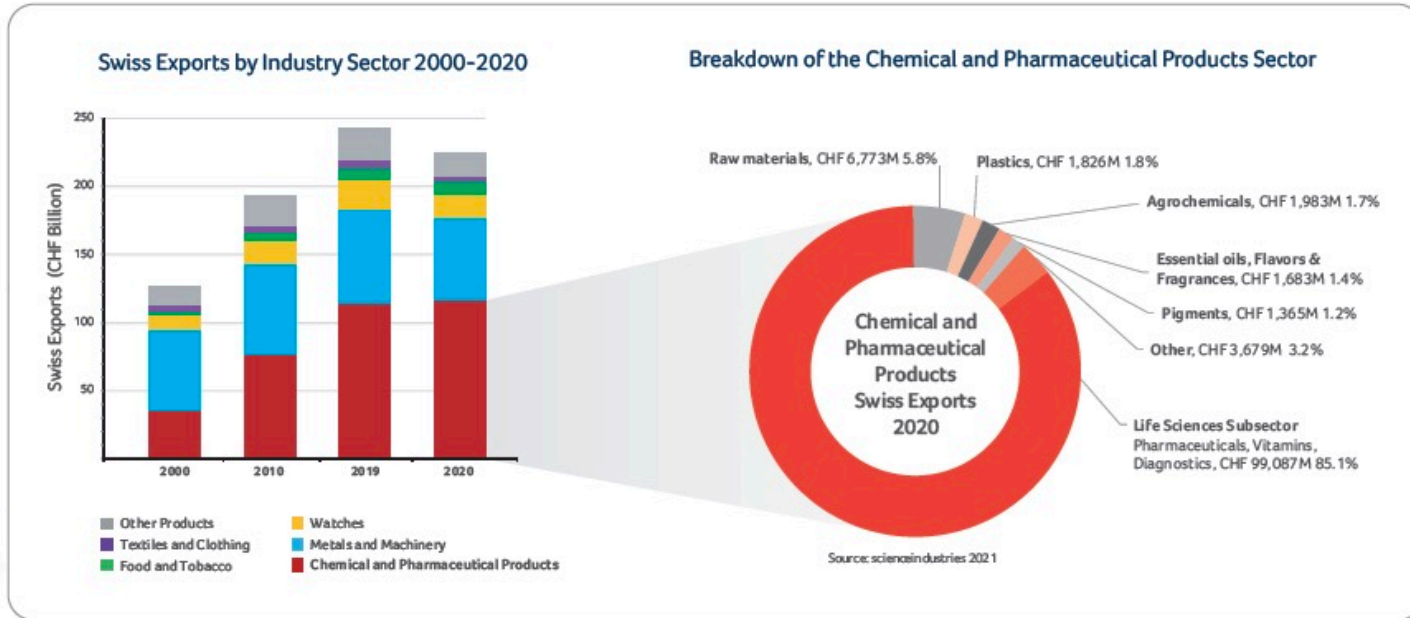
# Number of Swiss biotech employees 2018-2020



Source: Annual Reports, website information and EY

# Life science exports CHF 99.1B, up from 97.5 bn in 2019

## Pharma and biotech represent 44% of Swiss exports



Life science sector has grown by a factor of 4.5 since 2000, making it the strongest single driver of Swiss export growth





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## SIX-listed biotechs light-up exceptional trading year

- Trading volumes rose sharply by 177% 2020 vs 2019
- Total free float market capitalization of all SIX-listed biotech companies up 30% on 2020
- 84% of 2020 SIX listed biotech co. announcements had positive impact on share price (+9.6% on day of the announcement)



+ 65% 5-year Performance of the SXI Bio+ Medtech (Jan 16-Dec 20)

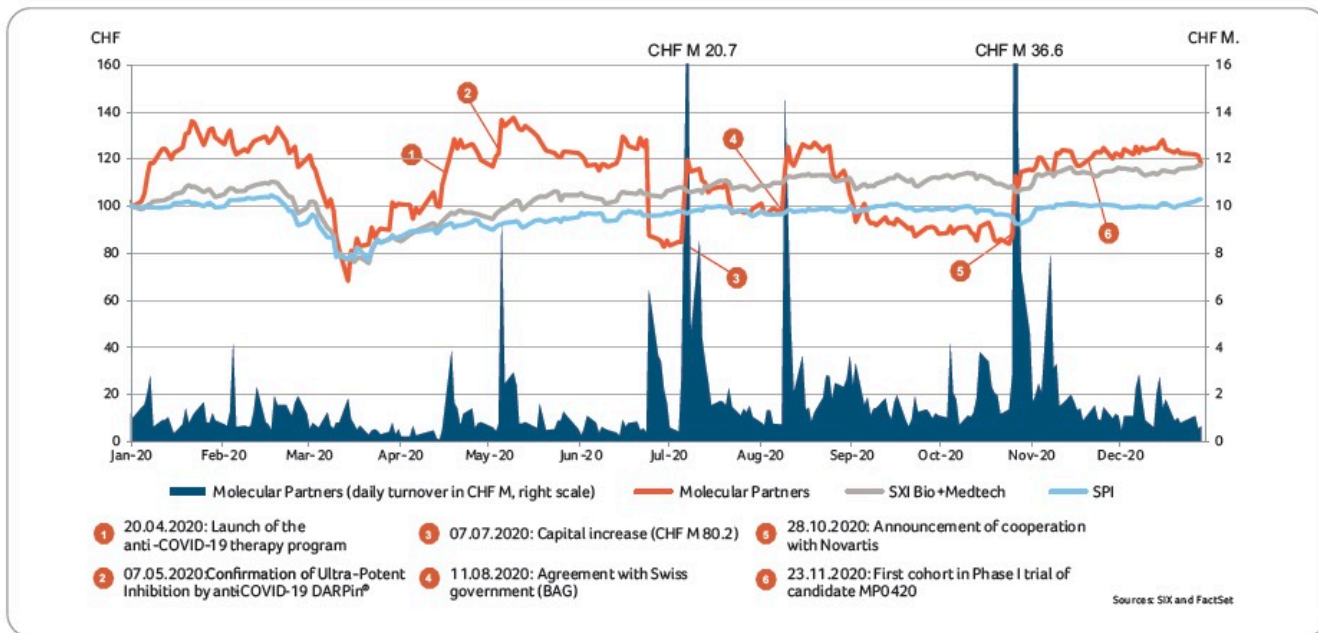
## In 2020, companies listed on SIX raised a total of CHF 5.7B in fresh equity capital aimed at driving growth

COMPANY	AMOUNT	PURPOSE	DATE 2020
Idorsia	CHF 330M CHF 536M	Market launch of daridorexant and financing of further pipeline products	May 20 October 23
Molecular Partners	CHF 80M	Development MP0420 (SARS-CoV-2) and expansion of pipeline resources	July 7
Cassiopea	CHF 25M	Finance of operations and preparations for the US launch of 'clascoterone cream 1%'	June 18
Kuros Biosciences	CHF 19M	Advance and accelerate commercial rollout of MagnetOs	October 20
ObsEva	CHF 18M	Financing of further pipeline development	September 20

Source: SIX

# Molecular Partners

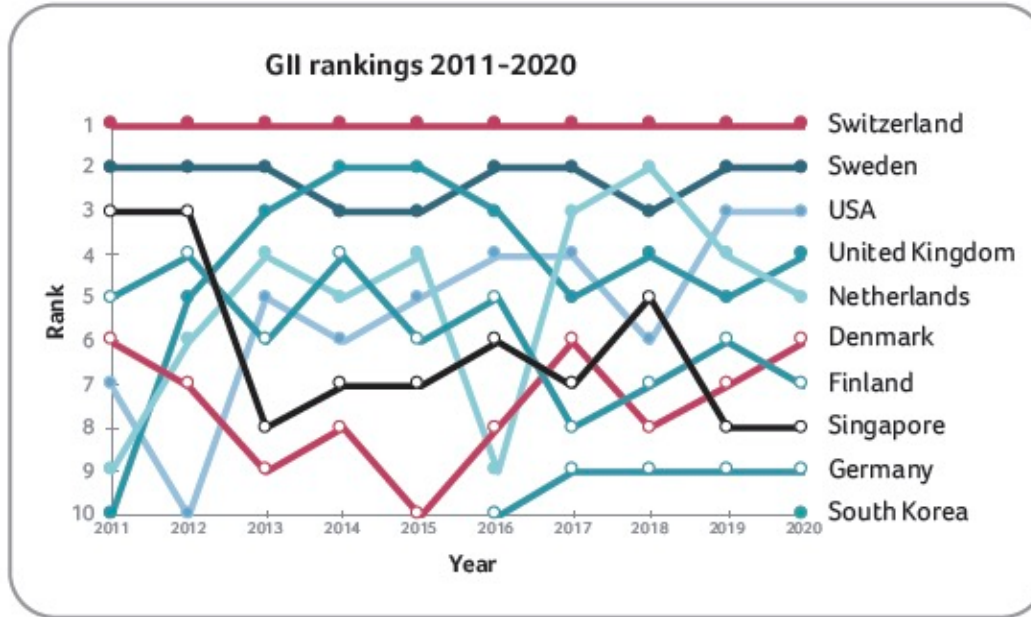
## Outperforms SXI Bio+Medtech Index3 (+17.5%)



Annual performance of +18.3% in 2020, was able to outperform the SPI (+3.0%) and finished the year slightly better than the SXI Bio+Medtech Index3 (+17.5%)

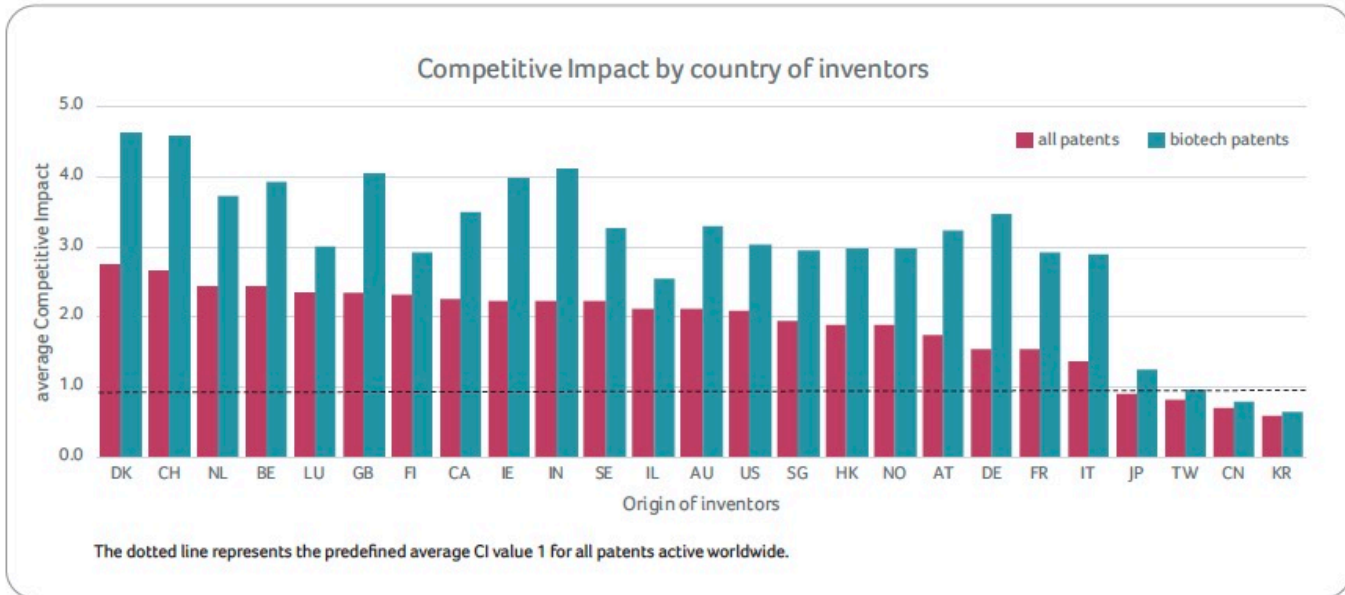
# Winning portfolio with high quality patent output

## Switzerland ranked # 1 in Global Innovation Index (GII) since 2011



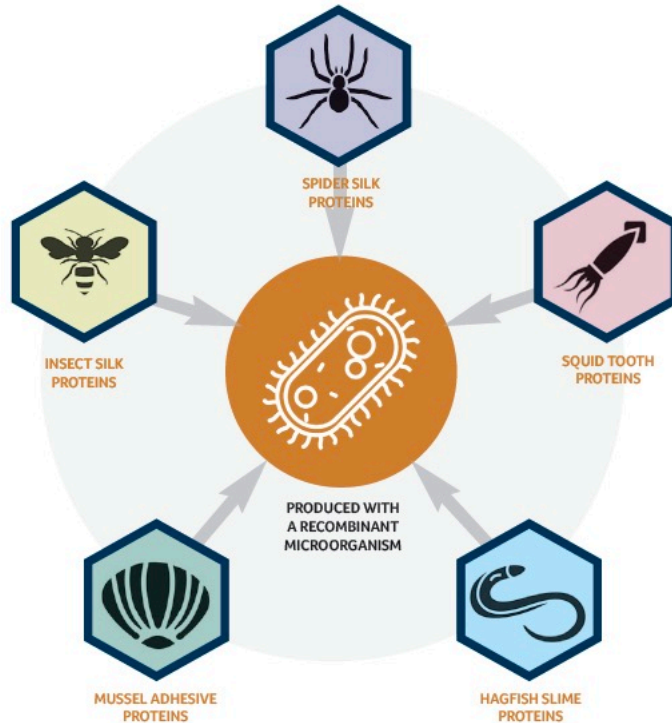
# Swiss biotech patents regarded as “jewels in the crown”

Denmark and Switzerland rank first, for both biotech and all patents



# Untapped potential in industrial biotechnology

## Organic chemistry at the crossroad



Industrial biotechnology is a green fuel in a dirty economy

It uses enzymes and microorganisms to produce products in many different markets and applications including small molecule drugs and fine chemicals

**satw** it's all about technology

Swiss Academy of Engineering Sciences SATW

# SWISS BIOTECH SUCCESS STORIES

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## Celebrating and honoring major achievements

The Swiss Biotech Association has launched Swiss Biotech Success Stories to celebrate those who have made significant contributions to the industry



# SWISS BIOTECH SUCCESS STORIES

Dedicated to scientists, pioneers, entrepreneurs, innovators and supporters who led the way, opened the horizon and prepared the ground for lasting achievements

Swiss Biotech Success Stories accentuate past industry highlights and act as motivator for future achievements



Success Stories Award winners 2021

**BACHEM**

**basilea**

**LONZA**

*ESBATech*

novimmune 



**SWISS BIOTECH  
SUCCESS STORIES**

Celebrating and honoring  
major achievements

# Switzerland: A dynamic biotech ecosystem

## Key 2020 figures at a glance

