

SWISS BIOTECH DAY 2023



SWISS BIOTECH DAY 2023

Media Conference

April 24, 2023, Congress Center Basel, Room Rio



Swiss Biotech Report 2023

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April 24, 2023

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April 24, 2023



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Sector weathers global disruption well & continues to drive healthcare innovation

- Record revenues of CHF 6.8B
- Industry's CHF 1.3B fund raising exceeds 2019 pre-COVID levels
- R&D investment reaches new record of CHF 2.7B
- 47 approvals by Swissmedic – a record
- Employment grows 7.2% - talent pool broadens
- Ecosystem strengthens, ~20% of European biotech companies now headquartered in Switzerland
- Swiss Biotech Association celebrates 25 years of Swiss biotech innovation





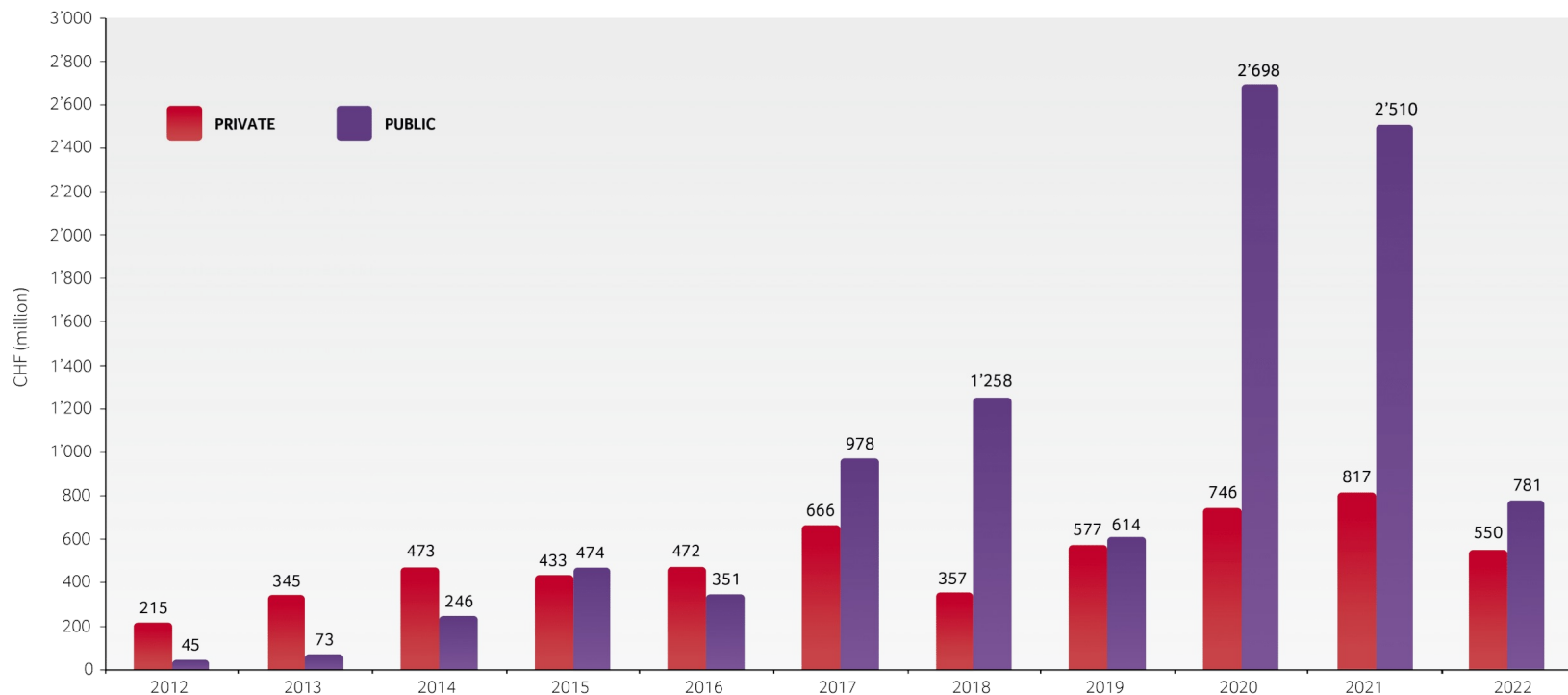
The year in figures



The 2022 data in the presented tables is based on information that was available up until March 31, 2023, when this report was compiled and went to press. At this time, some of the companies had not yet disclosed their financial figures for 2022. Therefore, some figures were carefully extrapolated on the basis of the latest interim data publicly available (i.e., Q3 or Q4 2022)

Capital investments in Swiss biotech companies 2012-2022

Private and public Swiss biotech companies



Source: EY (Capital investments include convertible bonds)

Swiss biotech companies raised a total of CHF 1.3B in 2022

Largest public and private financing rounds

2022 public financing rounds

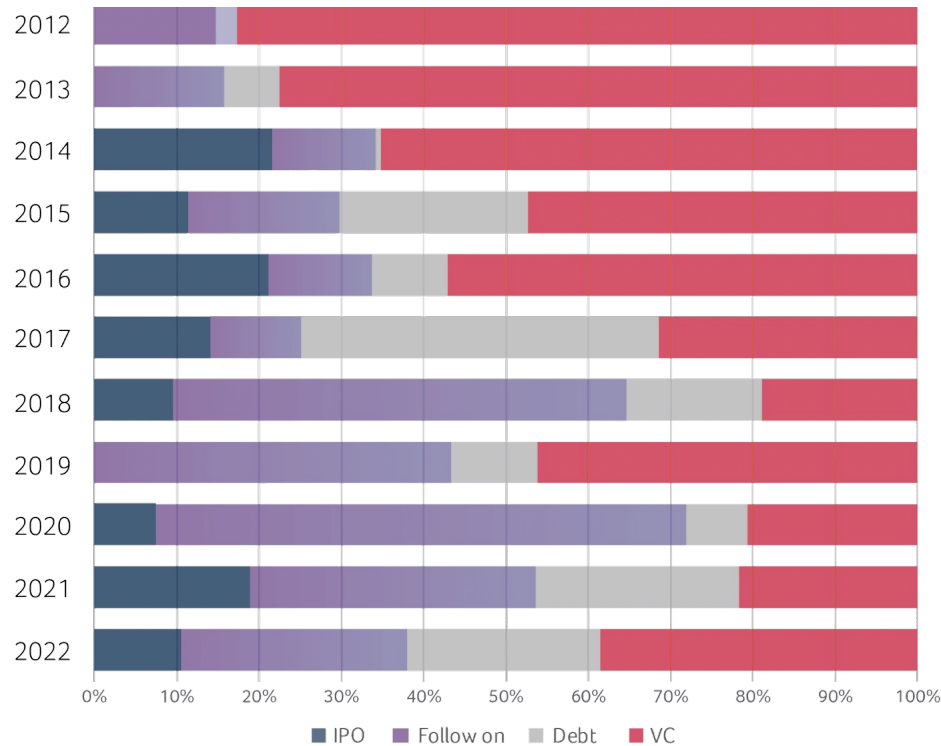
PUBLIC COMPANIES	CHF MILLION
VectivBio Holding	177
ADC Therapeutics	166
MoonLake Immunotherapeutics	140
Basilea	75
BioCartis	65
Total	623

2022 private financing rounds

PRIVATE COMPANIES	CHF MILLION
CDR-Life	72
ImmunOS Therapeutics	71
Cimeio Therapeutics	46
Opna Bio	36
Anokio	35
Total	260

Source: Annual Reports, website information, EY

Biotech financing categories in Switzerland 2012-2022



Source: Annual Reports, website information, EY

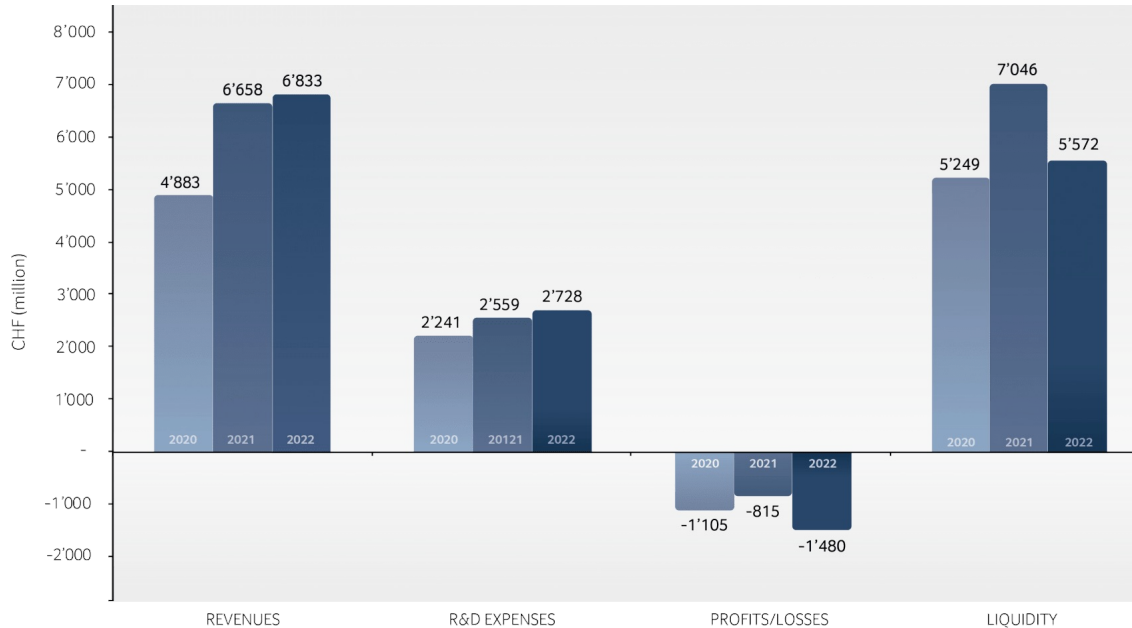
Public and private Swiss regional financing 2020-2022



Source: Annual Reports, website information, EY

Revenues, R&D expenses, profit/loss, liquidity 2020-2022

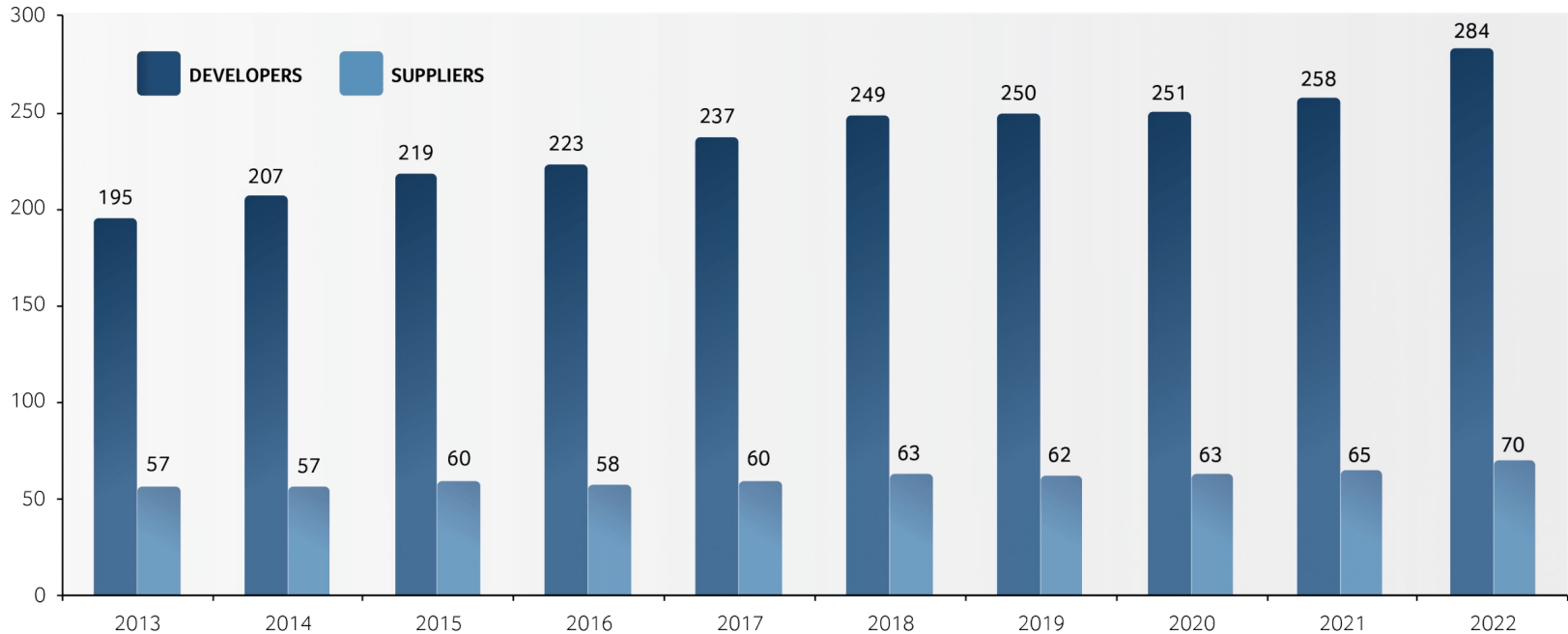
Total Swiss biotech companies



Source: Annual Reports, website information, EY

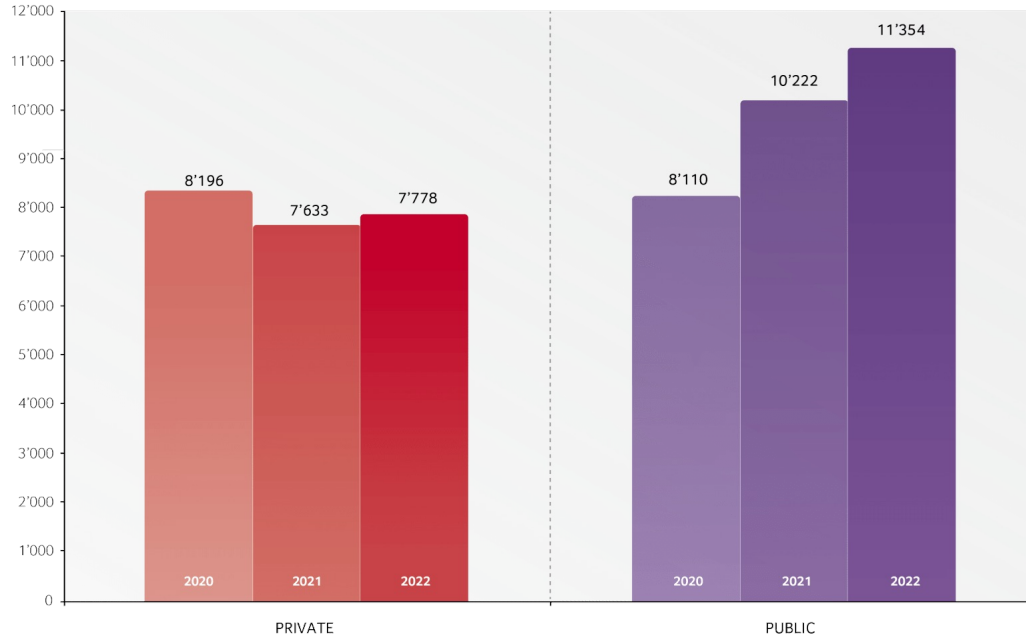
Note: The 2022 data in above tables is based on information that was available up until March 31, 2023. At this time, some of the companies had not yet disclosed their financial figures for 2022. Therefore, some figures were carefully extrapolated on the basis of the latest interim data publicly available (i.e. Q3 or Q4 2022).

Number of biotech companies in Switzerland 2013-2022



Source: Swiss Biotech Association, website information, EY

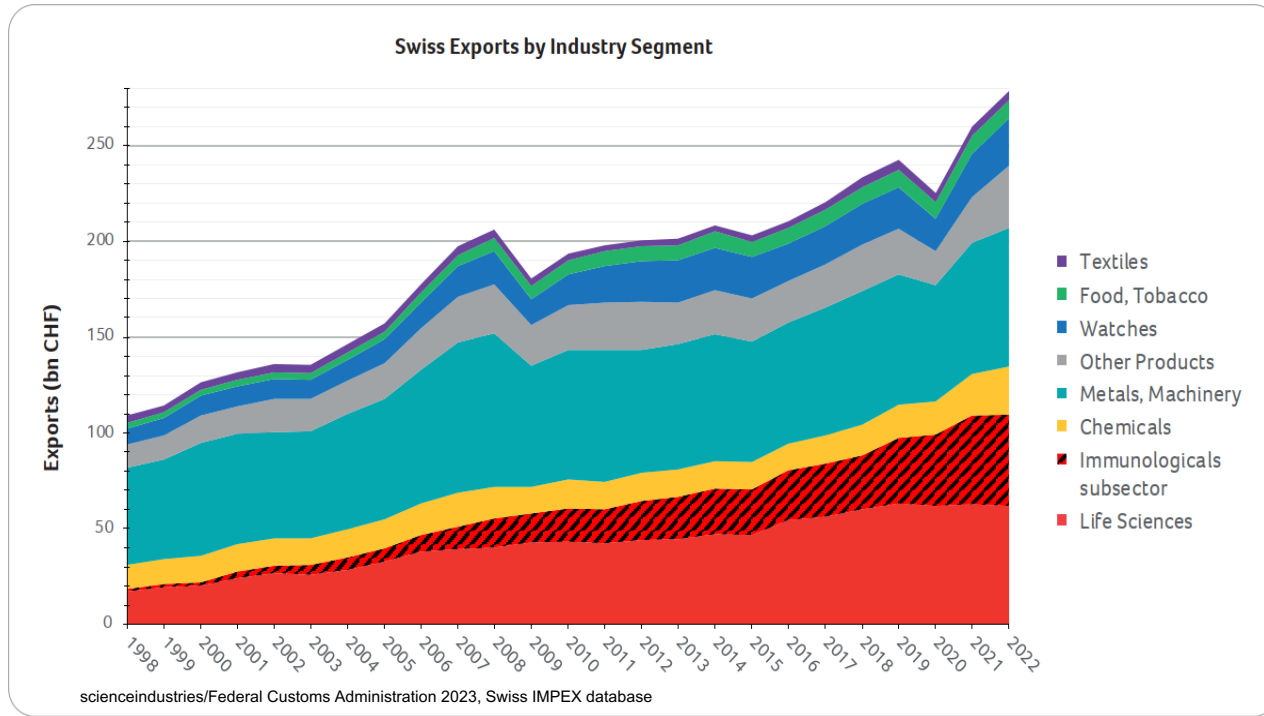
Number of employees in Swiss R&D biotech companies 2020-2022



Source: Annual Reports, website information and EY

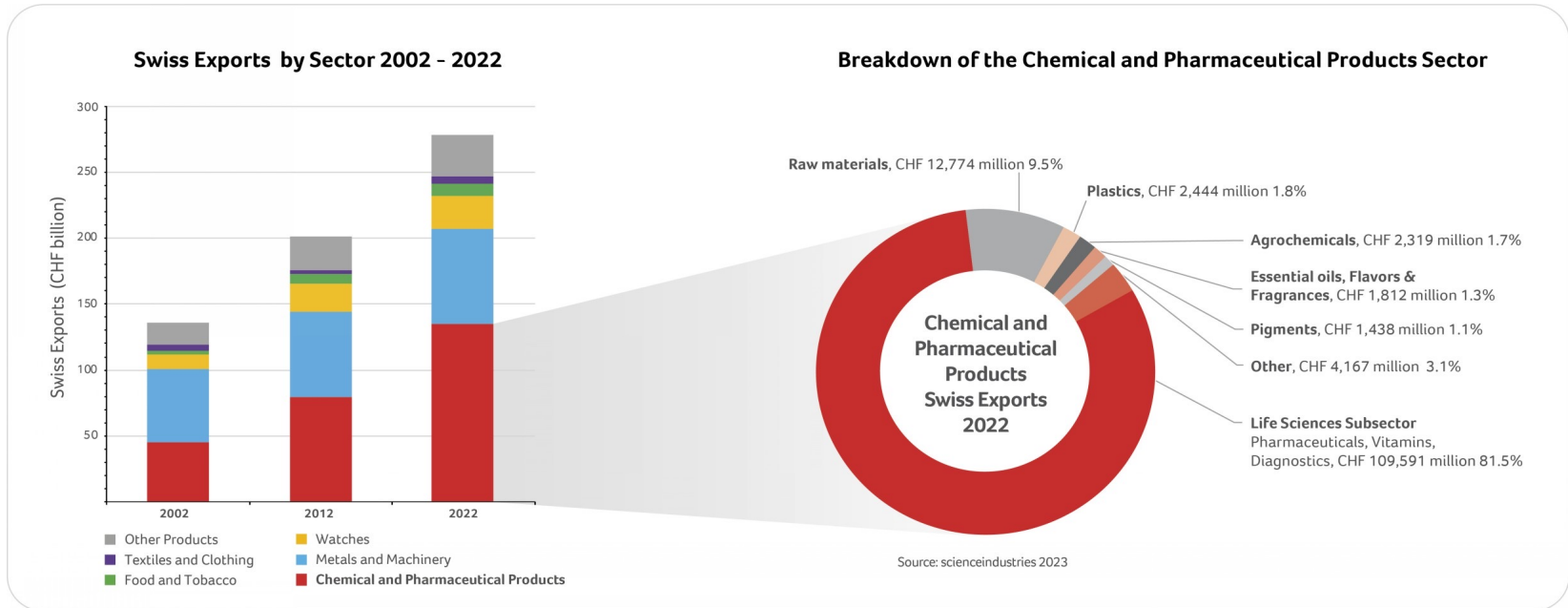
Life science exports CHF CHF 109.6B, up from 109.0B in 2021

Pharma and biotech represent 39% of Swiss exports



Life science exports: Steady growth across two decades

Pharma and biotech exports increased by 255% over the last 20 years



Life science sector's contribution to exports has grown by 255% since 2002, making it the strongest single driver of Swiss export growth



Swiss Biotech Report 2023
Effective solutions for global challenges



Swiss Biotech Report 2023

Effective solutions for global challenges

- 25 years of achievements, future pipeline strong
- Swiss biotech industry focused on global medical needs
- Government support focused on academic research and talent formation
- Biotech patents: Switzerland continues to hold a leading position with world-class and high impact patents and often develops these in international collaborations
- New topics of precision medicine, blockchain, AI & sustainability being embraced
- R&D investments at record level despite more difficult funding environment
- Sparks segment of SIX Swiss Exchange supports innovative SMEs
- All backed by broad talent pool, strong infrastructure and supportive environment

Impactful patents developed in international collaboration

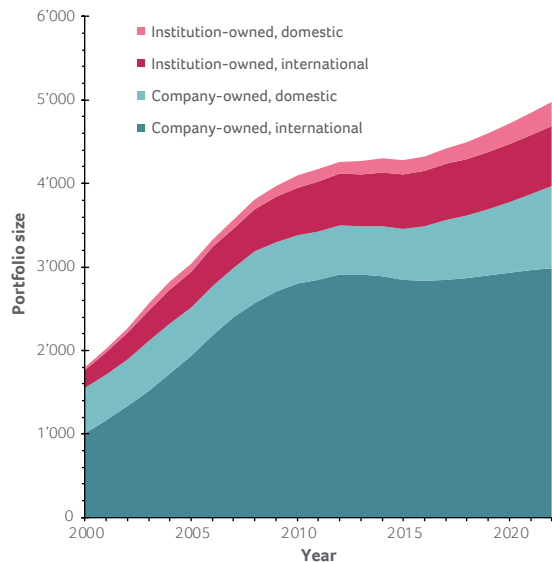


Figure 1: Portfolio size of Swiss origin biotech patents by ownership type (2000 to 2022)

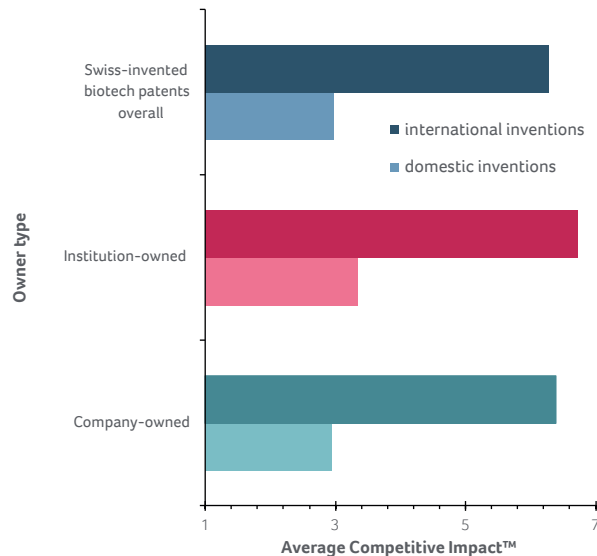
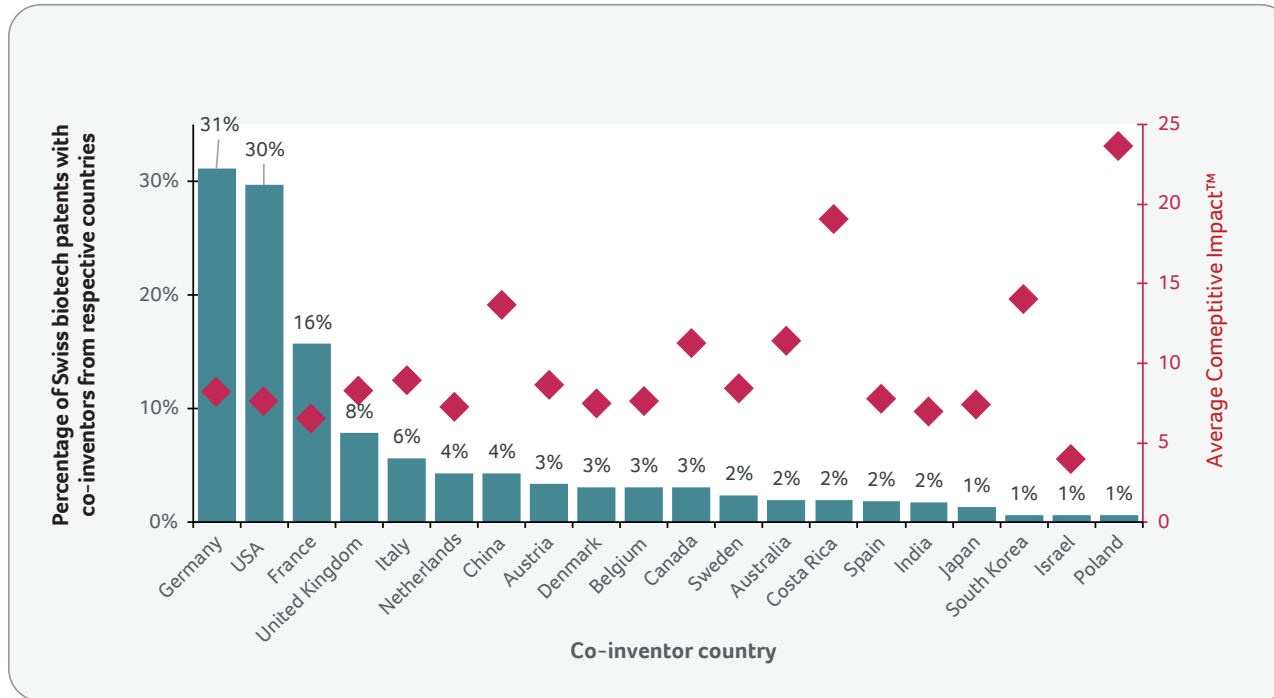


Figure 2: Average Competitive Impact™ of Swiss origin biotech patents by ownership type (data for the reporting date December 31, 2022)

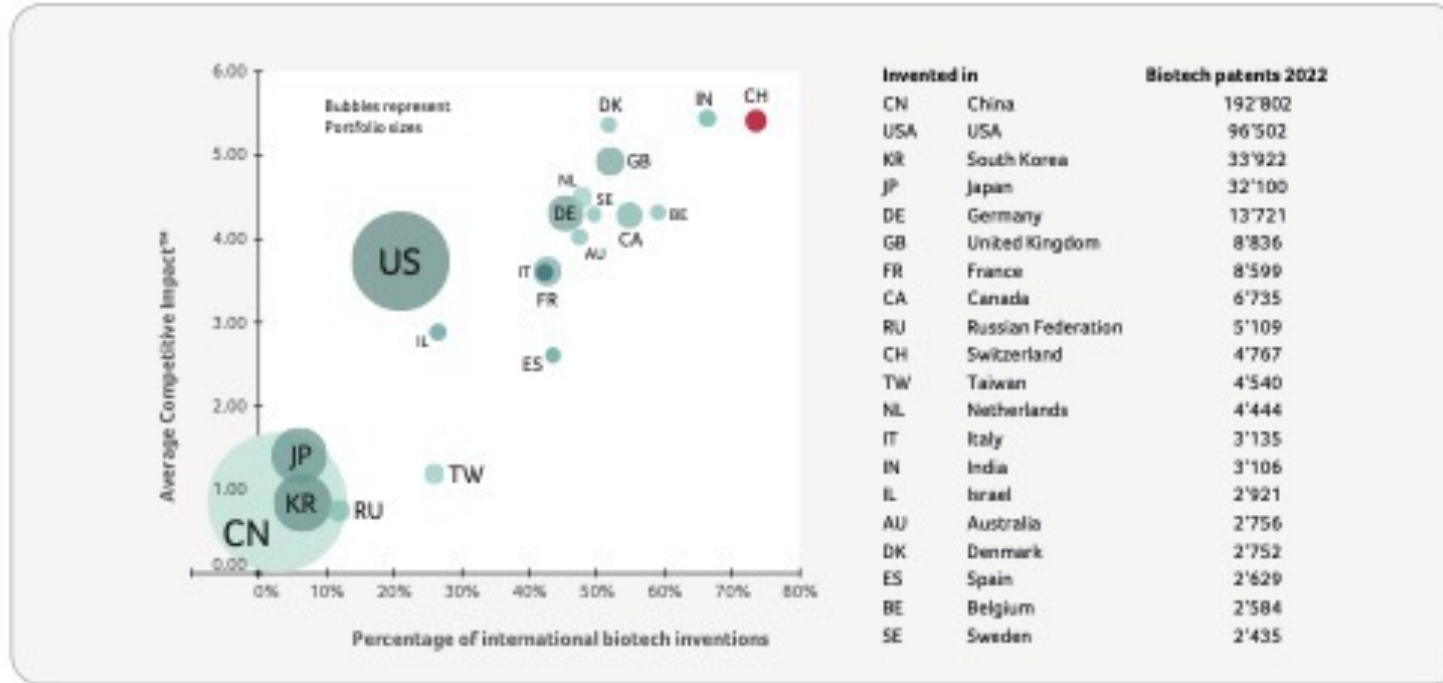
Source: IGE/IPI, Swiss Biotech Report 2023

Co-inventor countries of Swiss biotech patents



Source: IGE/IPI, Swiss Biotech Report 2023

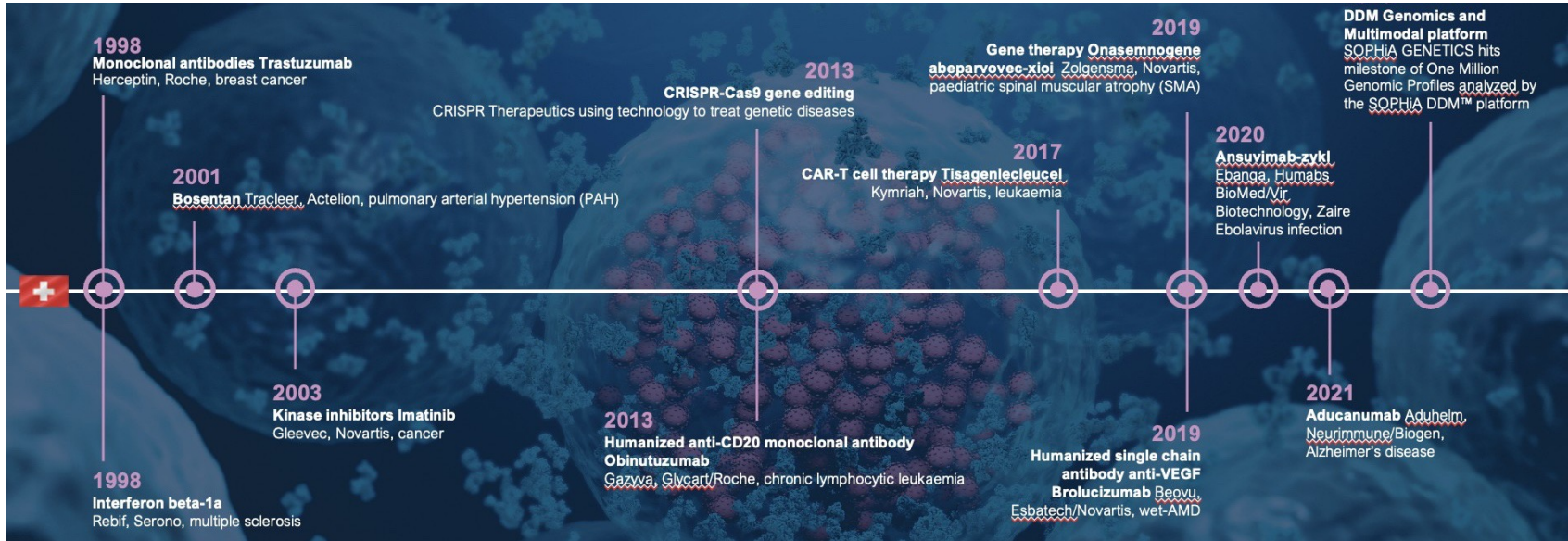
Top 20 countries of biotech patents' origin



Source: IGE/IPI, Swiss Biotech Report 2023

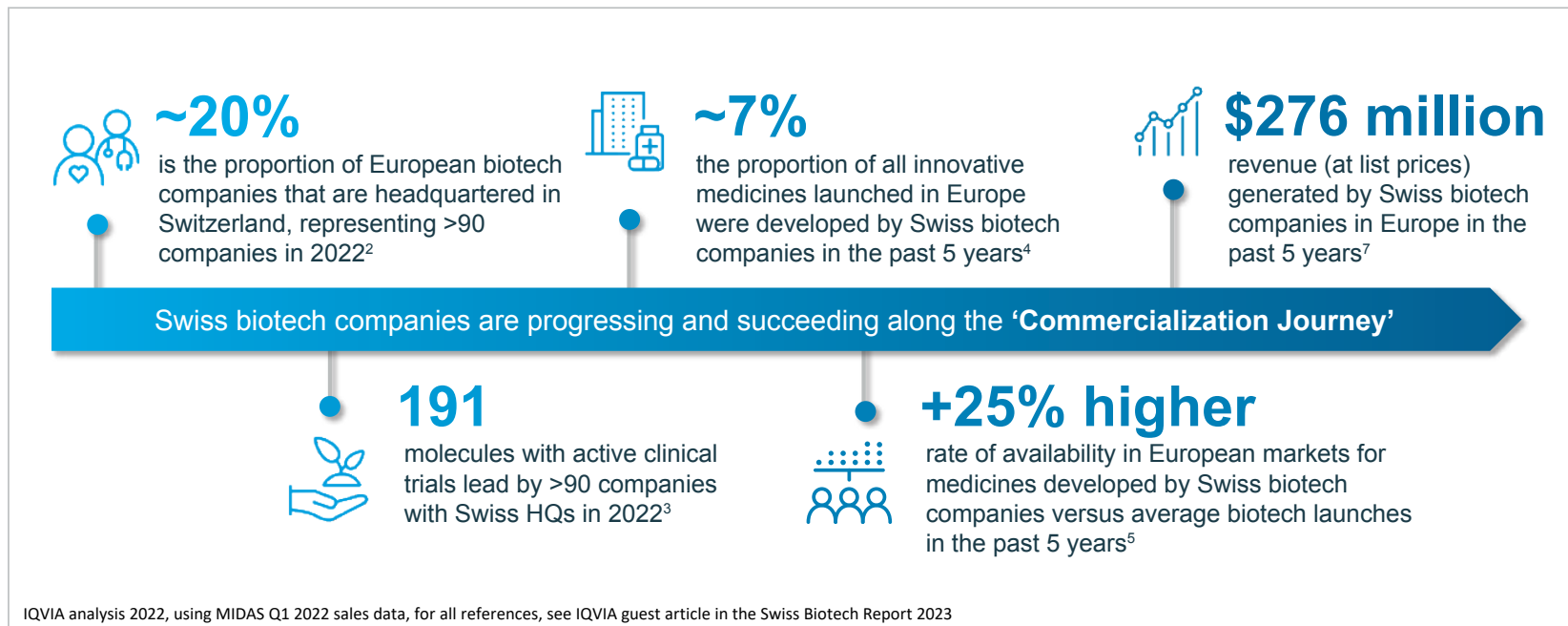
Celebrating 25 years of the Swiss Biotech Association

Major achievements of Swiss biotech innovation

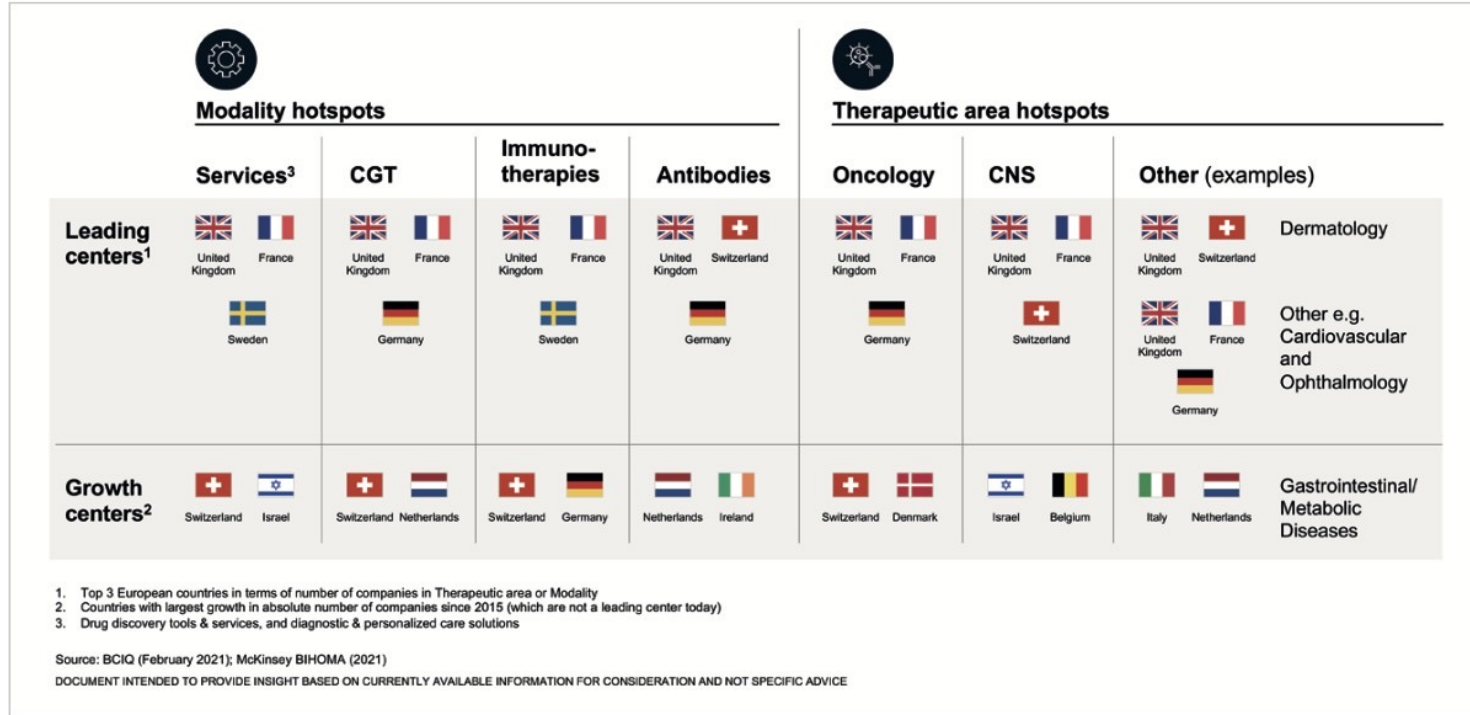


Most of these highlights were achieved in international collaboration and benefit patients around the world. They do not represent a comprehensive list but rather a selection that emphasizes the diversity of modalities that have been developed over time and the broad range of medical needs they help to address. Supported by Citeline.

A smoothly functioning ecosystem

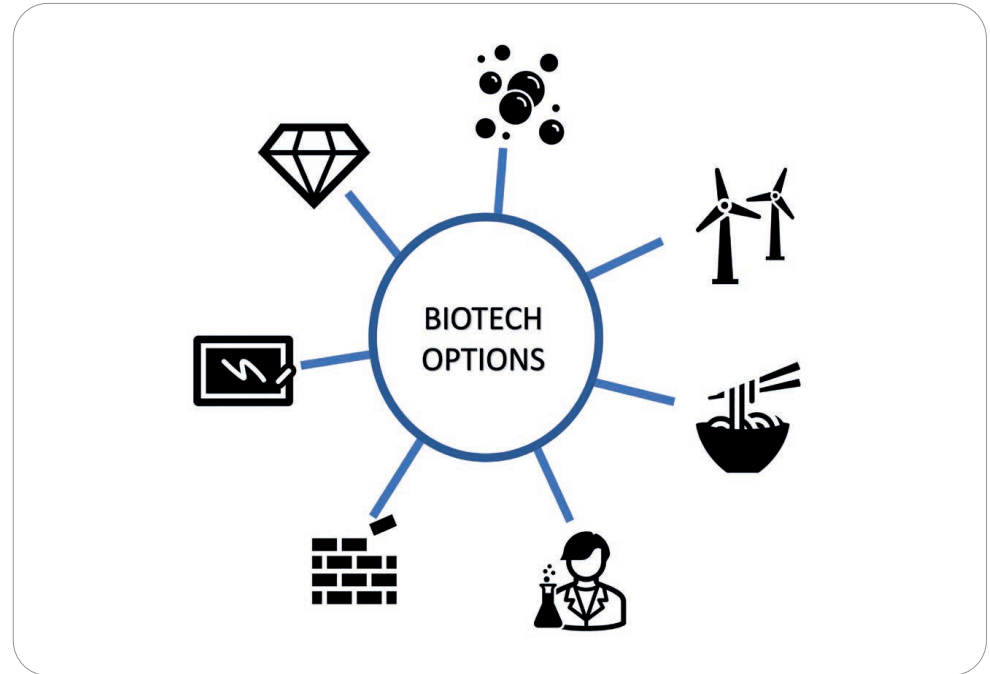


Modality and therapeutic area hotspots in Europe



Biotechnology applications beyond healthcare

- Global sales of biotechnology sector amount to USD 500B, ~50% relate to healthcare applications
- Huge potential for biotechnology applications beyond healthcare
- The Swiss Biotech Association launches separate chapter to develop an industrial biotech cluster in Switzerland
- Biotechnology is an innovation driver in major industries such as mining, construction, recycling and energy

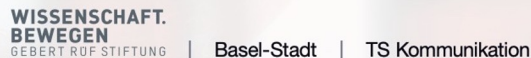


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SWISS BIOTECH SUCCESS STORIES

Celebrating and honoring major achievement

- The Swiss Biotech Association's Swiss Biotech Success Stories celebrate those who have made significant contributions to the industry
- Dedicated to scientists, pioneers, entrepreneurs, innovators and supporters who led the way, opened the horizon and prepared the ground for lasting achievements
- Awarded annually, the Swiss Biotech Success Stories accentuate past industry highlights and act as motivator for future achievements

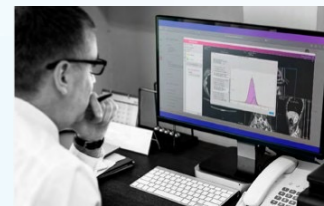
Swiss Biotech Success Stories award winners 2023



HUMABS BioMed
a subsidiary of Vir Biotechnology



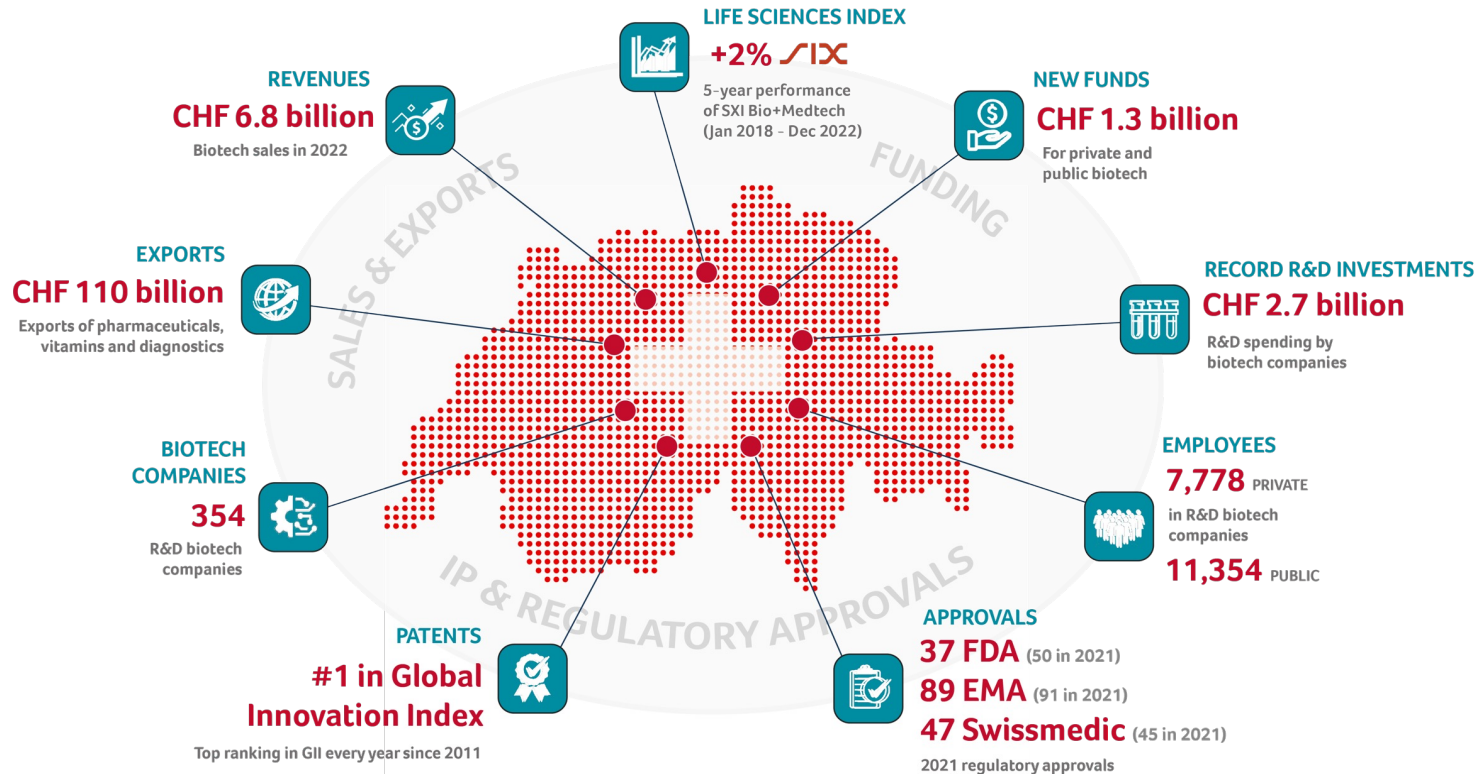
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SWISS BIOTECH SUCCESS STORIES

Celebrating and honoring
major achievements

Swiss Biotech Report 2023 - key figures 2022 at a glance



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SWISS BIOTECH DAY 2024

April 22-23, 2024 · Congress Center Basel