

SWISS BIOTECH DAY 2024





SWISS BIOTECH DAY 2024

Media conference

April 22, 2024, Congress Center Basel, Room Rio



Swiss Biotech Report 2024

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April 22, 2024

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April 22, 2024



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Swiss biotech strongly engaged in international alliances

Record revenues - capital investments increased by more than 50%

- Record revenues of CHF 7.3 billion (USD 8.1 billion)
- Capital investments increase by more than 50% to CHF 2.0 billion – CHF 1.4 billion by public companies, CHF 0.6 billion by privately financed companies
- Significant licensing and M&A activity: VectivBio, T3, CRISPR Therapeutics, Santhera
- R&D investments of publicly traded biotech companies decreased in line with global markets, whereas privately financed companies increased both R&D investments & liquidity reserves
- Record number of product approvals by Swissmedic, EMA and FDA – including world's first CRISPR gene editing therapy
- Swiss Biotech Day increases international presence, presenting the Global Village, the partnering platform for international delegations





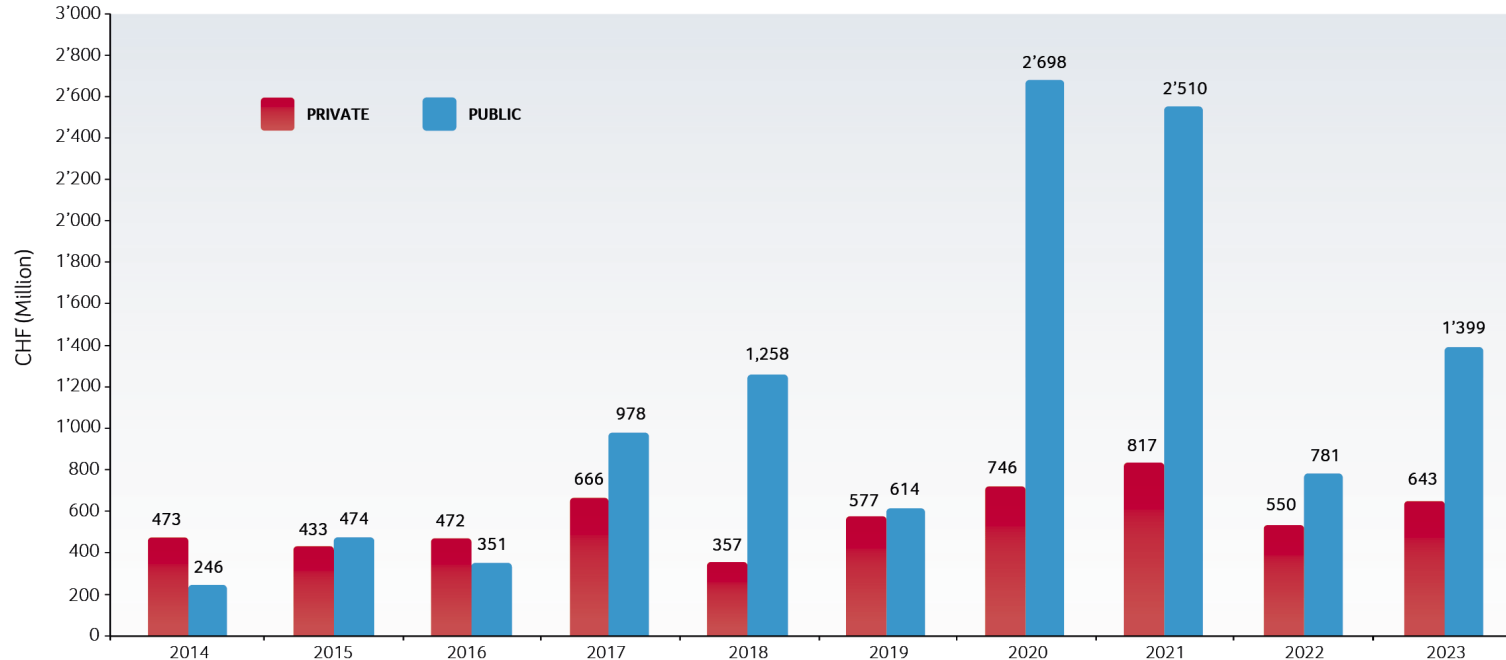
The year in figures



The data in the presented tables is based on information that was available up until March 31, 2024. At this time, some of the companies had not yet disclosed their financial figures for 2023. Therefore, some figures were carefully extrapolated on the basis of the latest interim data publicly available (i.e., Q2 or Q3 2023).

Capital investments in Swiss biotech companies 2014-2023

Private and public Swiss biotech companies



Source: EY (Capital investments include convertible bonds)

Swiss biotech companies raised a total of CHF 2.0 bn in 2023

Largest public and private financing rounds

2023 public financing rounds

PUBLIC COMPANIES	CHF MILLION
MoonLake Immunotherapeutics	415
Lonza	150
Oculus	134
Bachem	108
Idorsia	75
Total	882

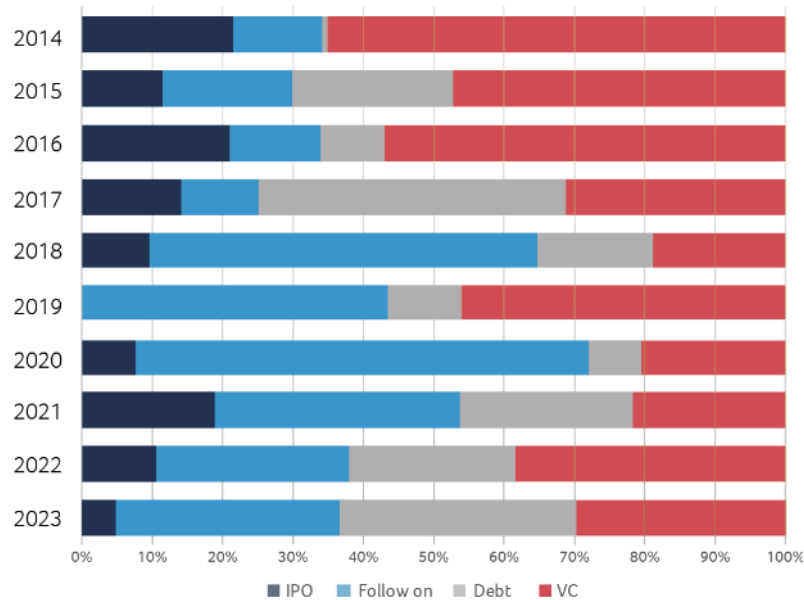
2023 private financing rounds

PRIVATE COMPANIES	CHF MILLION
Noema Pharma	103
Alentis Therapeutics	94
Rejuveron	67
Nouscom	65
NewBiologix	45
Total	374

Source: Annual Reports, website information, EY

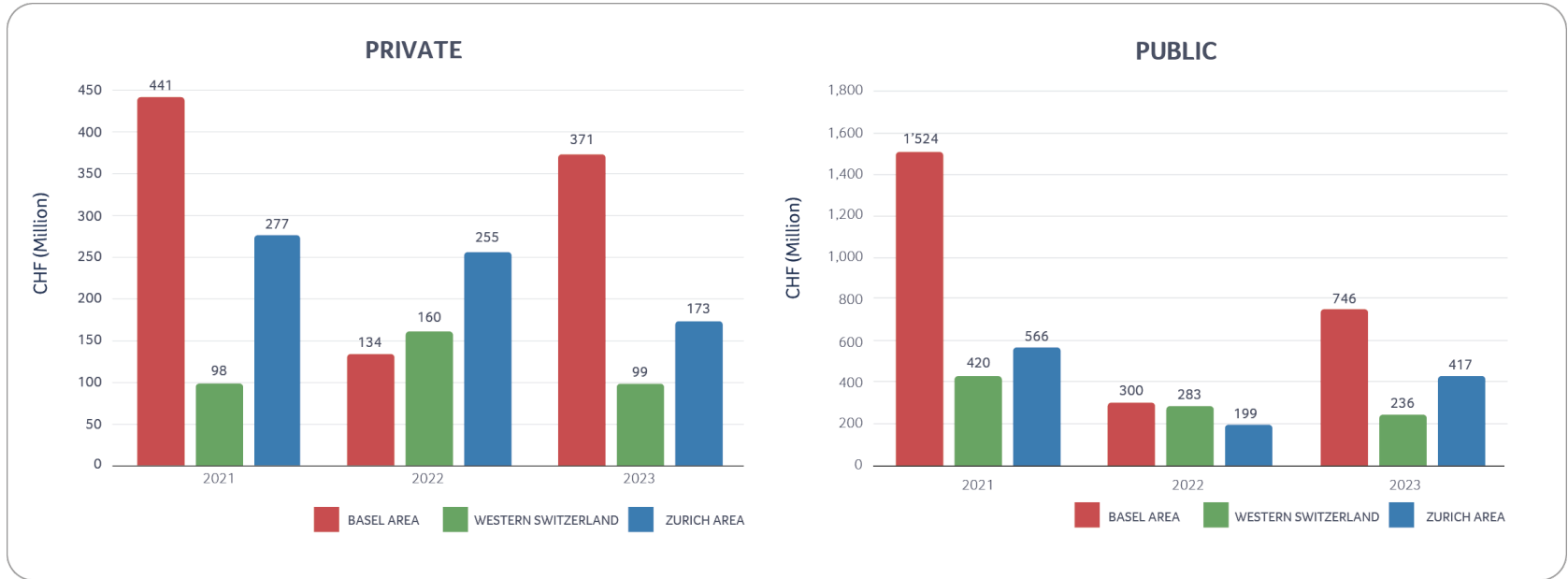
Biotech financing categories in Switzerland 2014-2023

History of financing categories in Switzerland



Source: Annual Reports, website information, EY

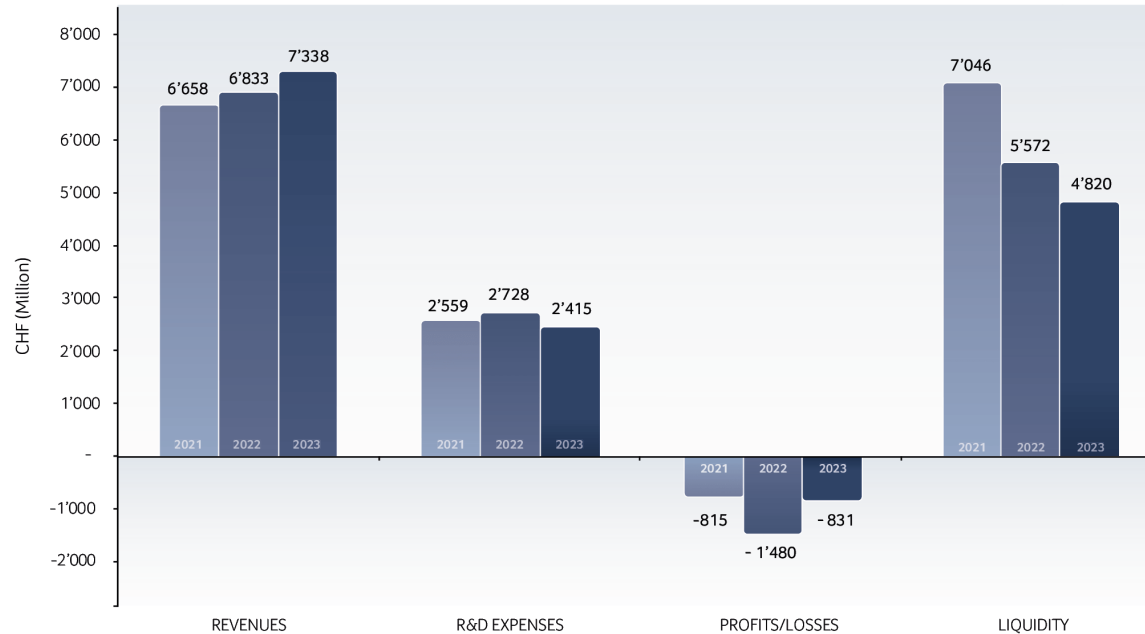
Public and private Swiss regional financing 2021-2023



Source: Annual Reports, website information, EY

Revenues, R&D expenses, profit/loss, liquidity 2021-2023

Total Swiss biotech companies

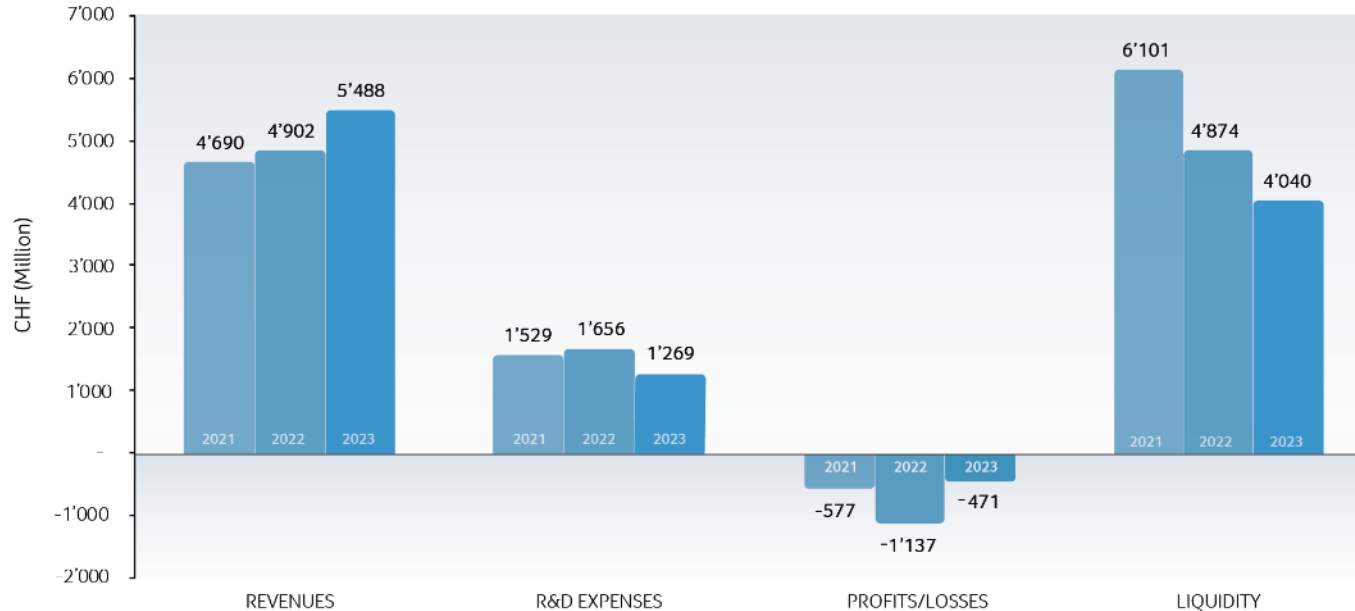


Source: Annual Reports, website information, EY

Note: The 2023 data in above tables is based on information that was available up until March 31, 2024. At this time, some of the companies had not yet disclosed their financial figures for 2023. Therefore, some figures were carefully extrapolated on the basis of the latest interim data publicly available (i.e., Q2 or Q3 2023).

Revenues, R&D expenses, profit/loss, liquidity 2021-2023

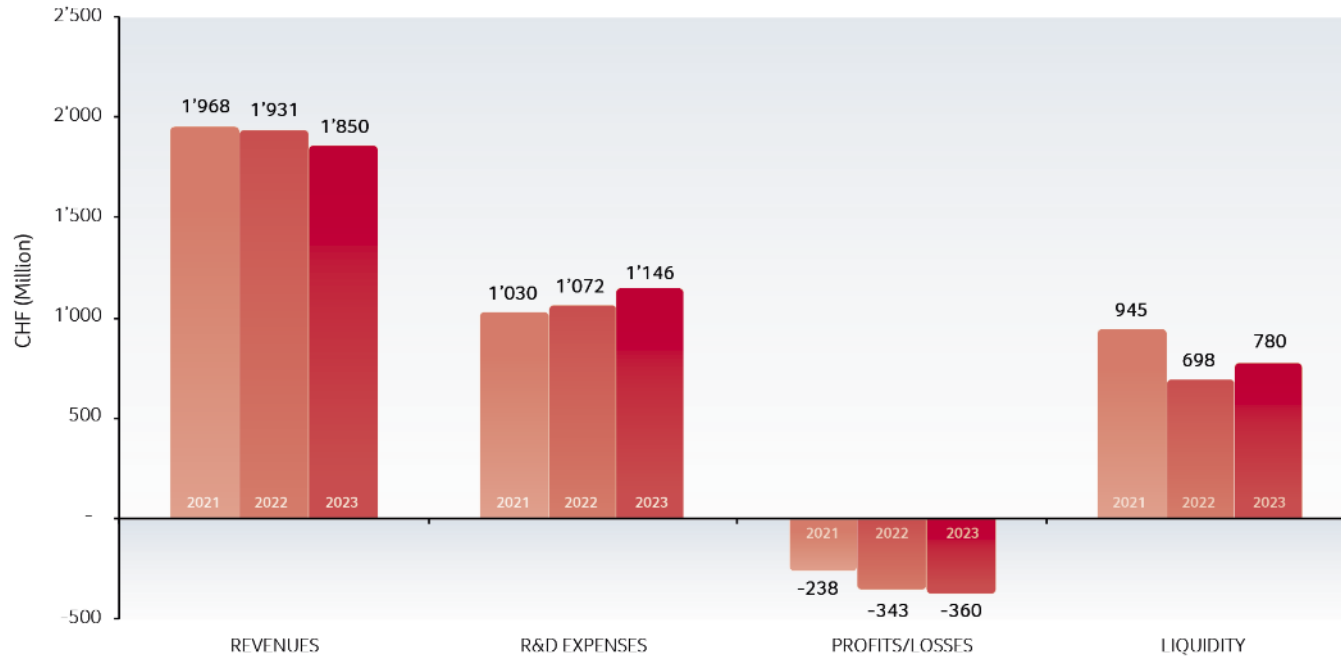
Public Swiss biotech companies



Source: Annual Reports, website information and EY

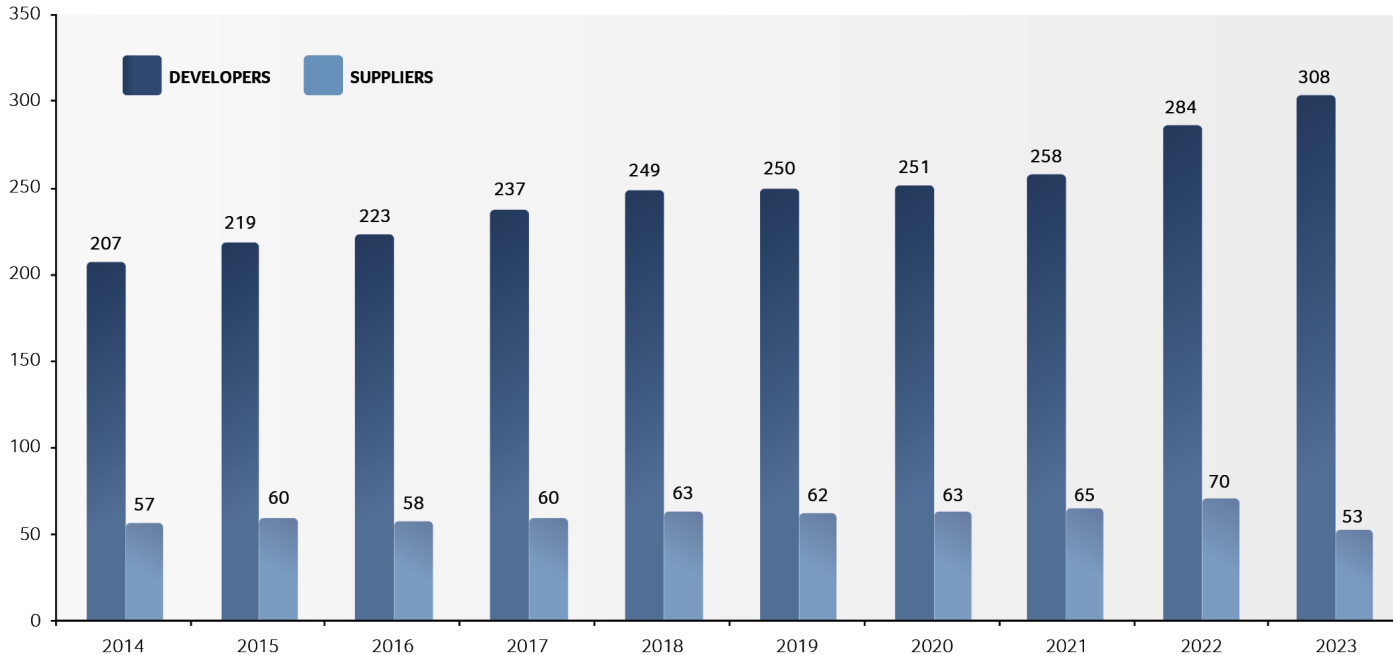
Revenues, R&D expenses, profit/loss, liquidity 2021-2023

Private Swiss biotech companies



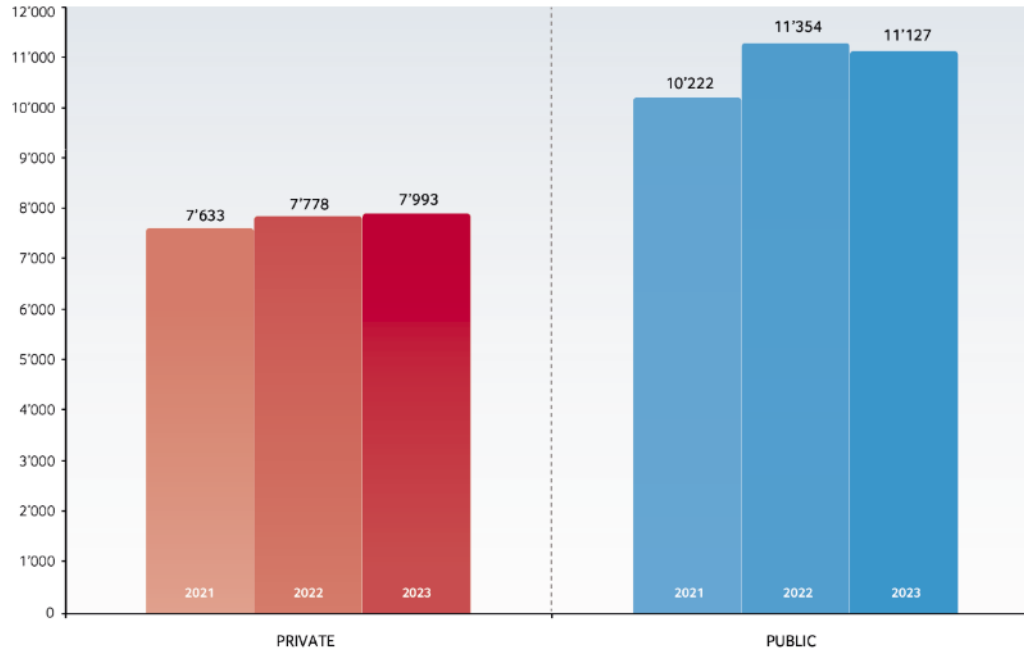
Source: Swiss Biotech Association, EY (incl. estimates and extrapolations based on prior year figures)

Number of biotech companies in Switzerland 2014-2023



Source: Swiss Biotech Association, website information and EY

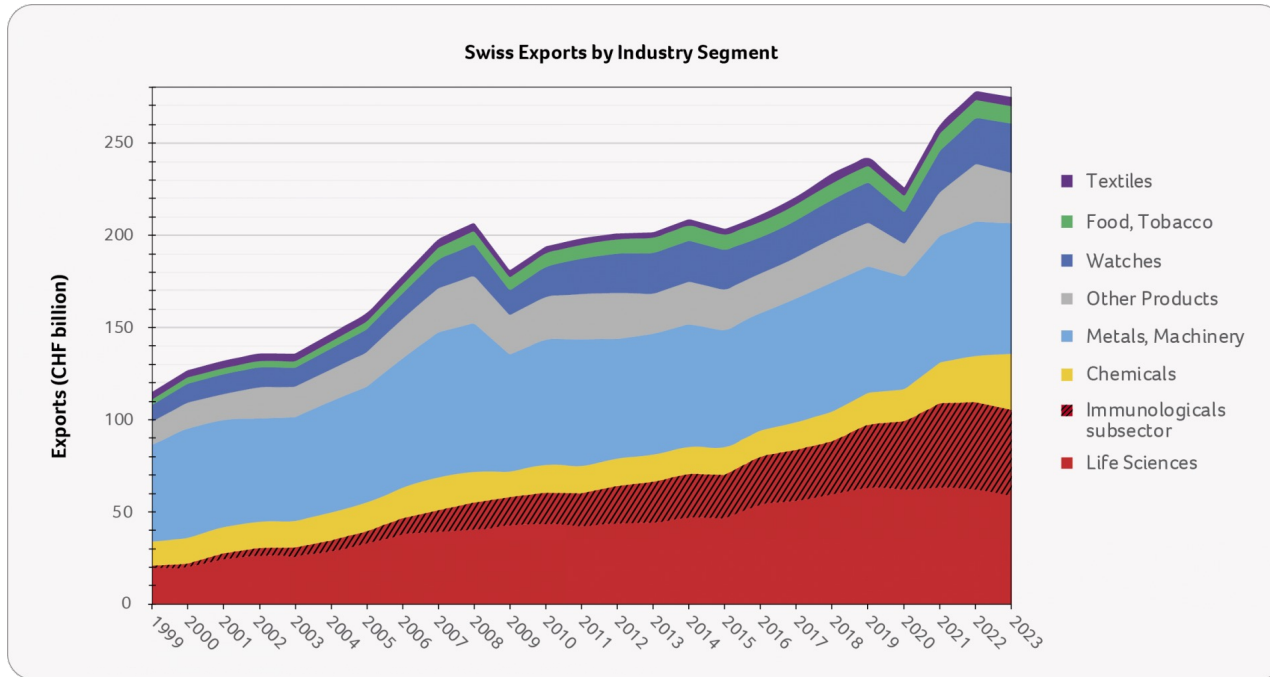
Number of employees in Swiss R&D biotech companies 2021-2023



Source: Annual Reports, website information and EY

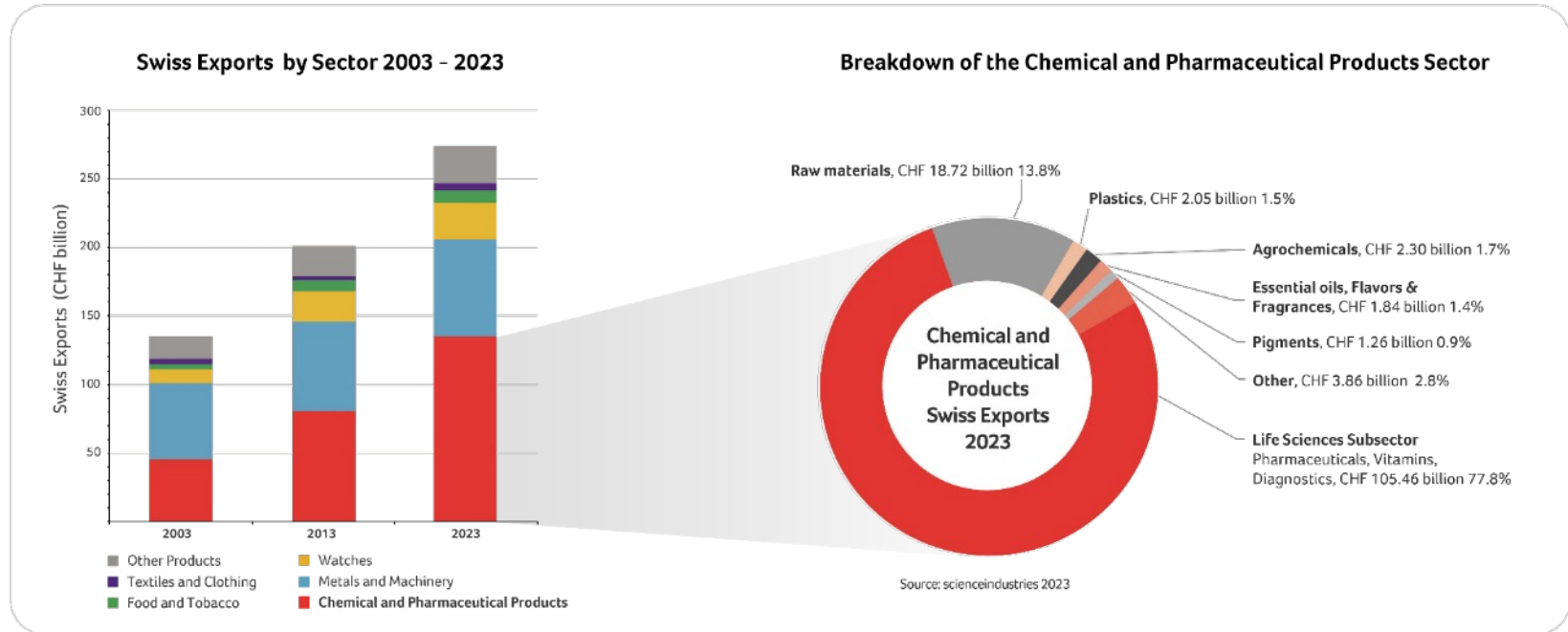
Life sciences exports amounted to CHF 105 bn in 2023

Pharma and biotech represent 38.5% of Swiss exports



Since 2013, the life sciences sector is the strongest contributor to Swiss exports

Life science exports: Steady growth across two decades pharma and biotech exports increased almost three-fold over the last 20 years



Life science sector's contribution to exports has grown by >250% since 2003, making it the strongest single driver of Swiss export growth



Main theme of the Swiss Biotech Report 2024
Reliable partners beyond borders

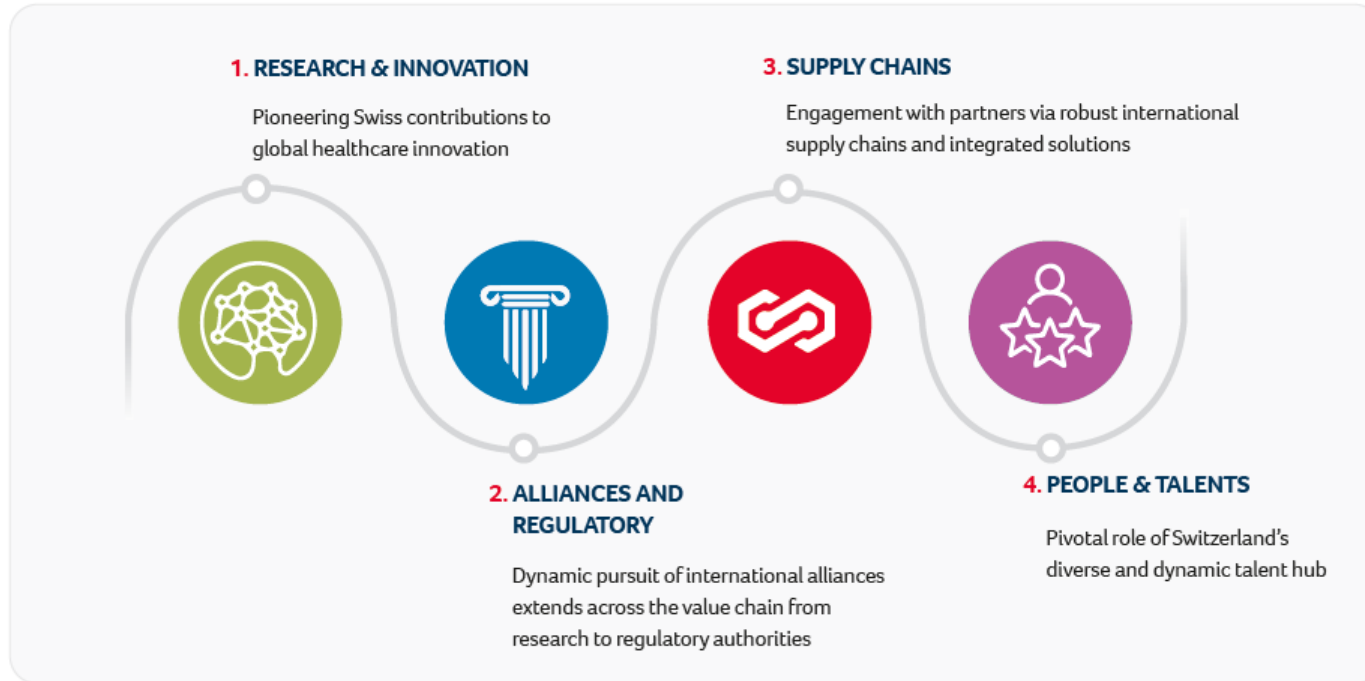


Swiss Biotech Report 2024

Reliable partners beyond borders

- Swiss biotech industry has always focused on global medical needs
- Depends on reliable international partners for alliances and supply chains
- Established a vast international collaboration network, together with Swiss universities, hospitals, CDMOs & pharma companies
- Benefits from a multinational talent pool that is collaborative by nature
- Stays top of Global Innovation Index through international collaborations
- Comprises companies that collaborate internationally from outset
- Forms regulatory alliances to improve global access for innovative products
- Offers Global Village platform to international delegations

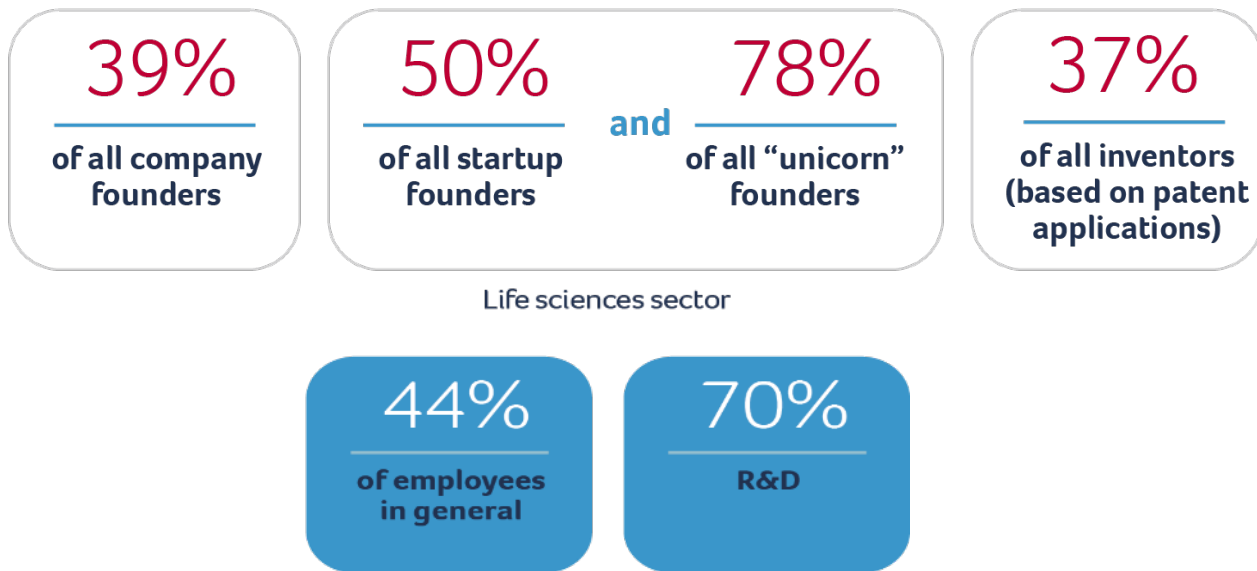
International alliances in support of global healthcare innovation



International alliances are formed all along the value chain from R&D to international supply chains

Multi-national talent pool effectively supports international collaboration

International talent and its role in the economy and the life sciences sector



Swiss basic research depends on international collaboration



“Switzerland is a very good country for collaboration”

Professor Effy Vayena, ETH, Zurich

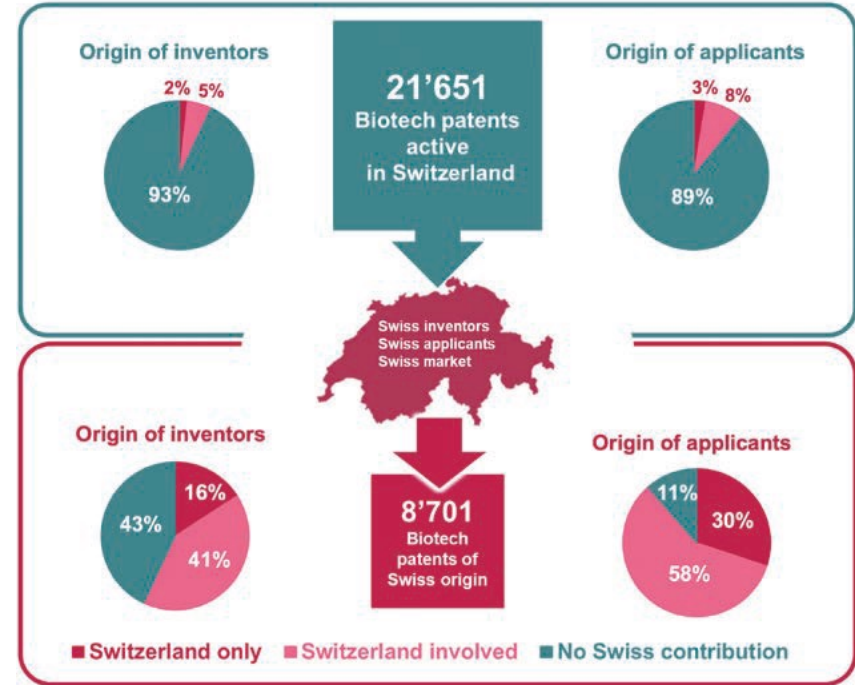


- SCNF Funding Schemes
- Scientific Exchanges
- COST Actions and Projects
- Mobility Grants
- Weave/Lead Agency
- SOR4D Consortia
- SPIRIT

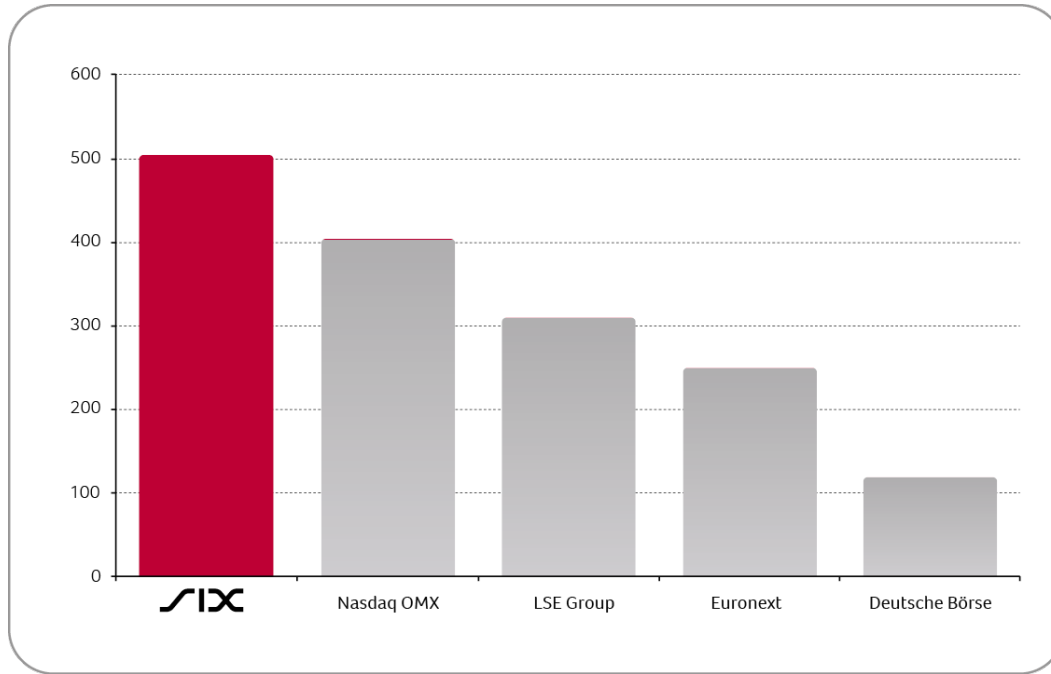
International collaborations make Switzerland a global hub for biotech innovation

The origin of biotech patents active in Switzerland is globally highly diversified in nature.

The vast majority of biotech patents active in Switzerland have been established in international collaboration or have been filed by international partners.



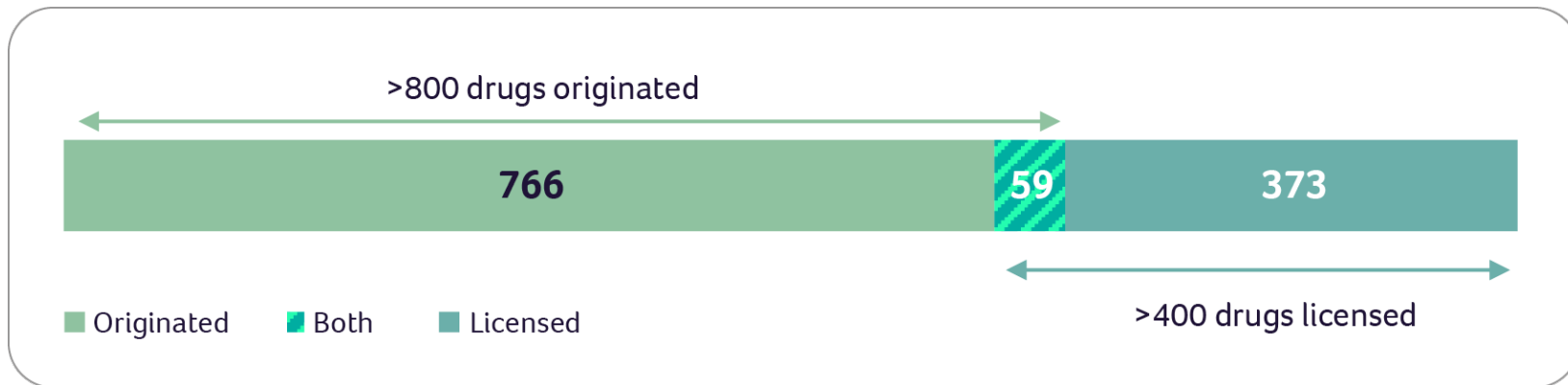
Free float market capitalization SIX Swiss Exchange



In comparison with its European peers, the SIX Swiss Exchanges had the highest free float market capitalization in the healthcare industry as per the end of 2023.

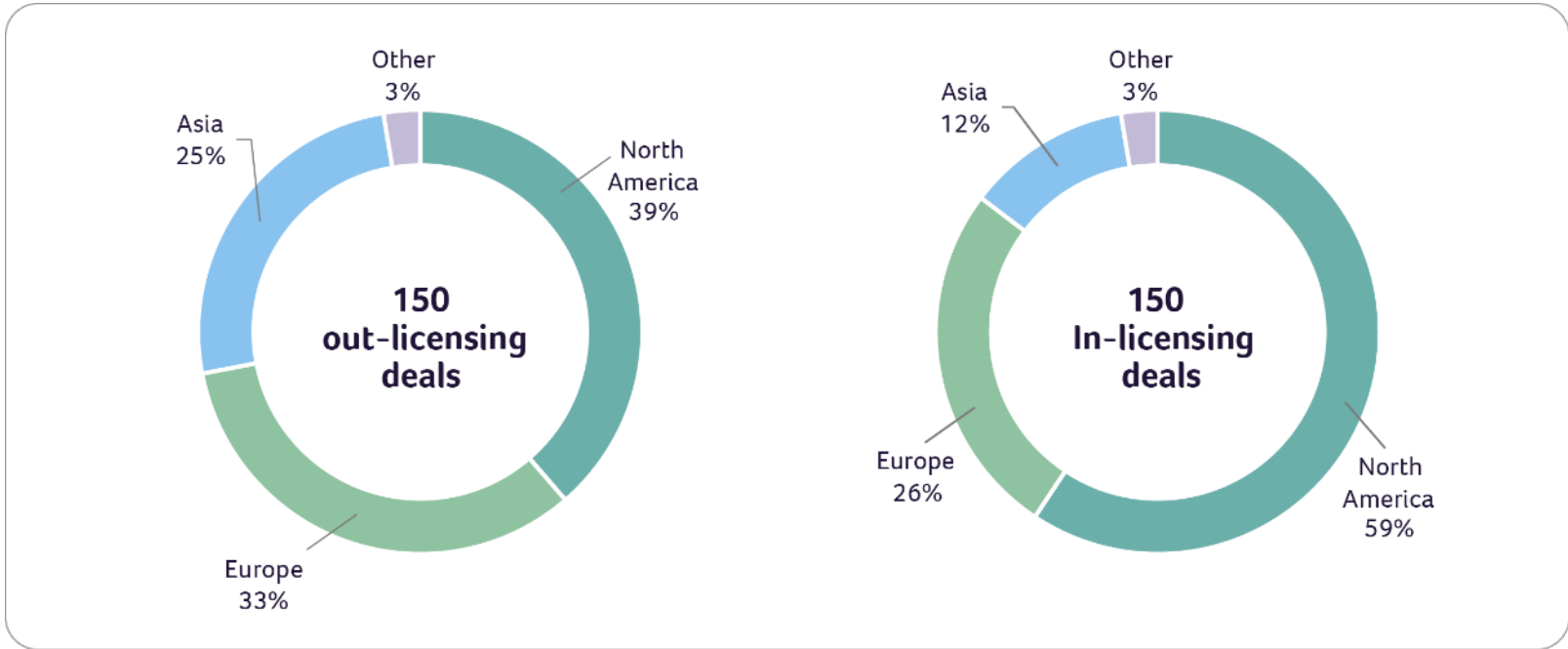
Source: IGE/IPI, SBA Annual Report, graph shows values in EUR billions

Swiss biopharma R&D pipeline at the end of 2023



Source: Citeline, Pharmaprojects, December 2023

Swiss biotech companies have a global partnership universe and collaborate internationally from the outset



Source: Citeline, Biomedtracker, December 2023

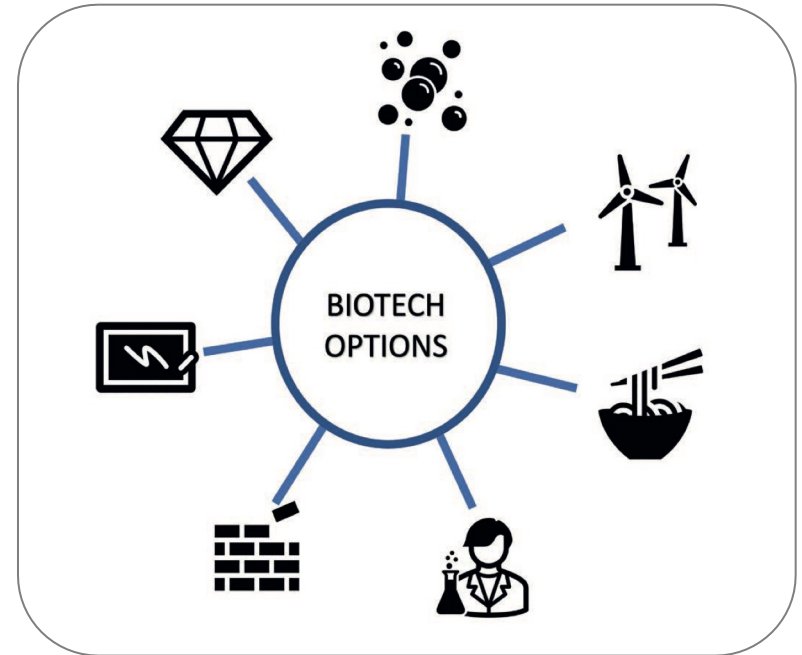
Swissmedic champions ACCESS Consortium and other alliances

- Swissmedic works to improve global access to Swiss-origin innovative medicines through international collaboration and harmonization
- The ACCESS consortium including the UK, Canada, Australia and Singapore is a great example of how alliances can deliver better results faster to a larger community



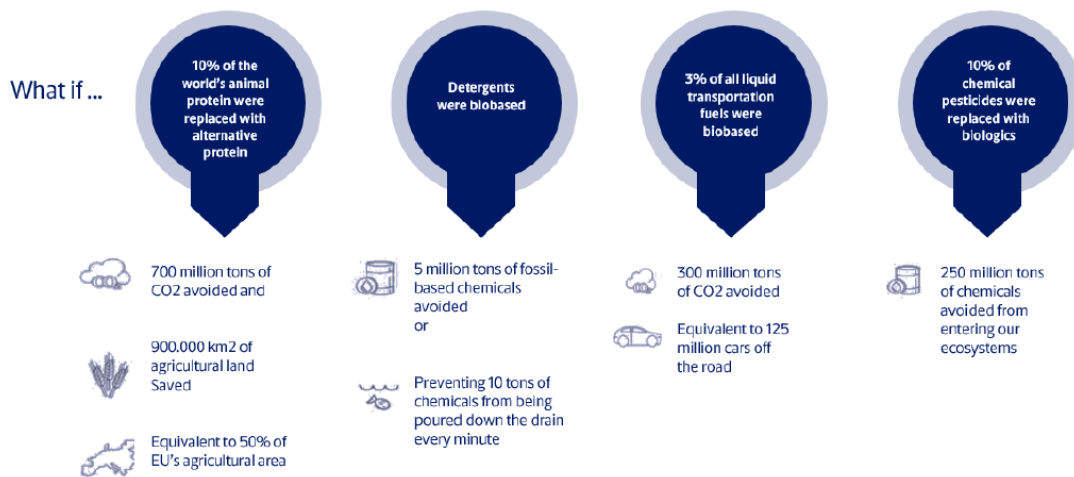
Biotechnology applications beyond healthcare also depend on collaborations

- Global sales of biotechnology sector amount to USD 500 billion, ca. 50% relate to healthcare applications
- There is a huge potential for biotechnology applications beyond health care
- The Swiss Biotech Association thus launched a 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



European Biosolutions Coalition

The green potential of biosolutions



- Strong focus on sustainability
- Climate change / CO₂ emission
- Alternative proteins, cultured meat
- Biobased raw materials
- Bio-based fuels
- "Biologicals" for plant protection
- Optimization of industrial processes through enzymes
- Carbon capture for food production

Global Village is our commitment to international collaboration



SWISS BIOTECH SUCCESS STORIES

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SWISS BIOTECH SUCCESS STORIES

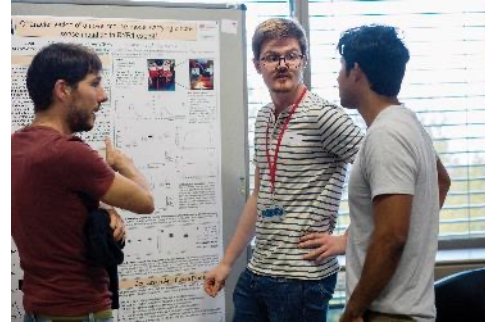
Celebrating and honoring major achievement

- The Swiss Biotech Association is launching Swiss Biotech Success Stories to 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
- Swiss Biotech Success Stories accentuate past industry highlights and act as motivator for future achievements

Success Stories Award winners 2024



Dr. Hans-Peter Strebel,
founder of Fumapharm AF

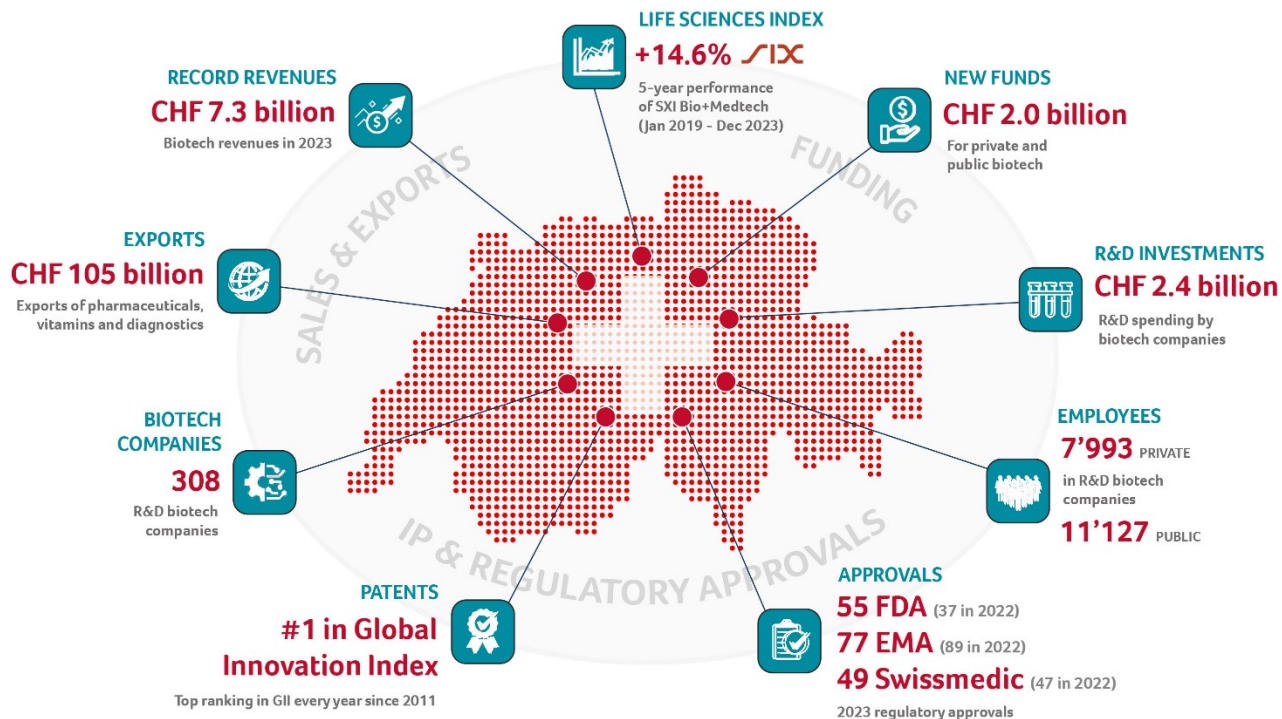


FSRMM – Swiss foundation supporting
neuromuscular disease R&D

**SWISS BIOTECH
SUCCESS STORIES**

Celebrating and honoring
major achievements

Swiss Biotech Report 2024 - key figures 2023 at a glance



Save the date

SWISS BIOTECH DAY 2025

May 5-6, 2025 · Congress Center Basel