



Swiss Biotech Report 2019

Jürg Zürcher
Swiss Biotech Day 2019
May 7, 2019

Steering Committee Swiss Biotech Report 2019



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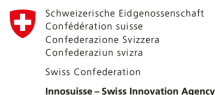
Jan Lucht



Christian Moser



Johanne Stettler



Laura Suter-Dick



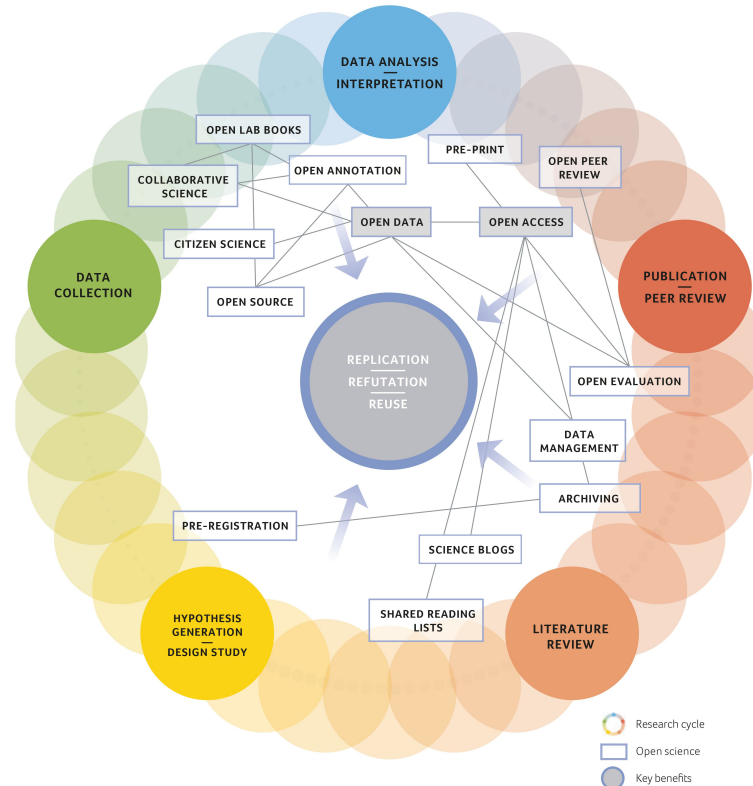
Sirpa Tsimal



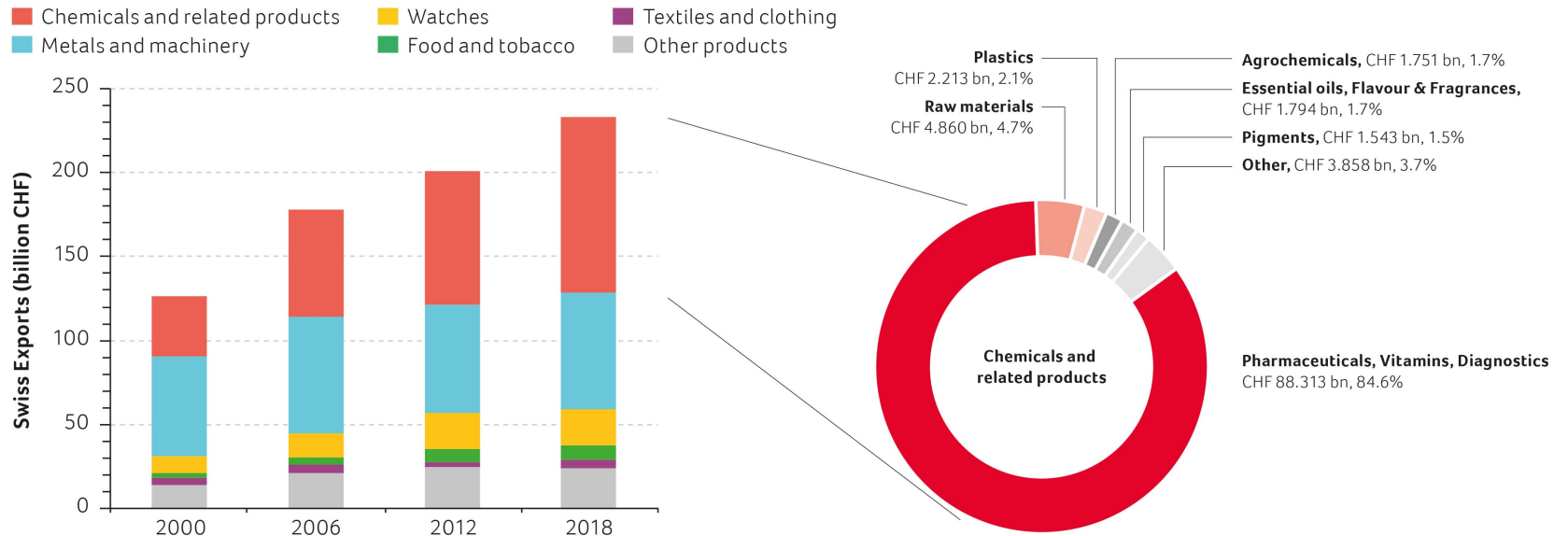
Jürg Zürcher



The elements of open science: Grassroots movements have created a plethora of new concepts

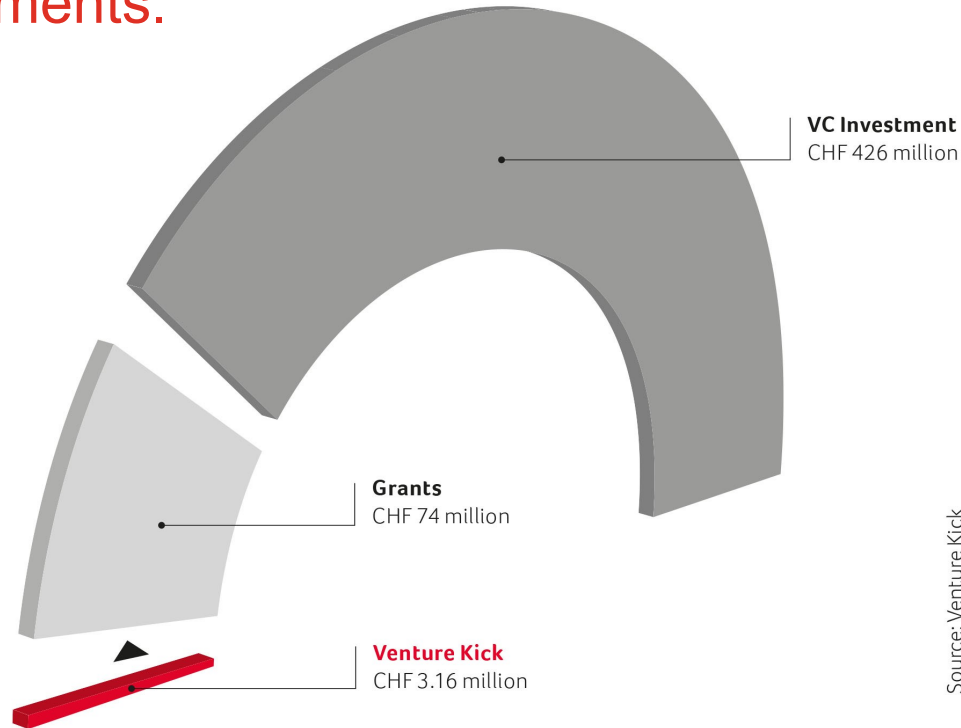


Swiss export statistics according to industry sector demonstrate the lead of the chemistry, pharma and biotech industry



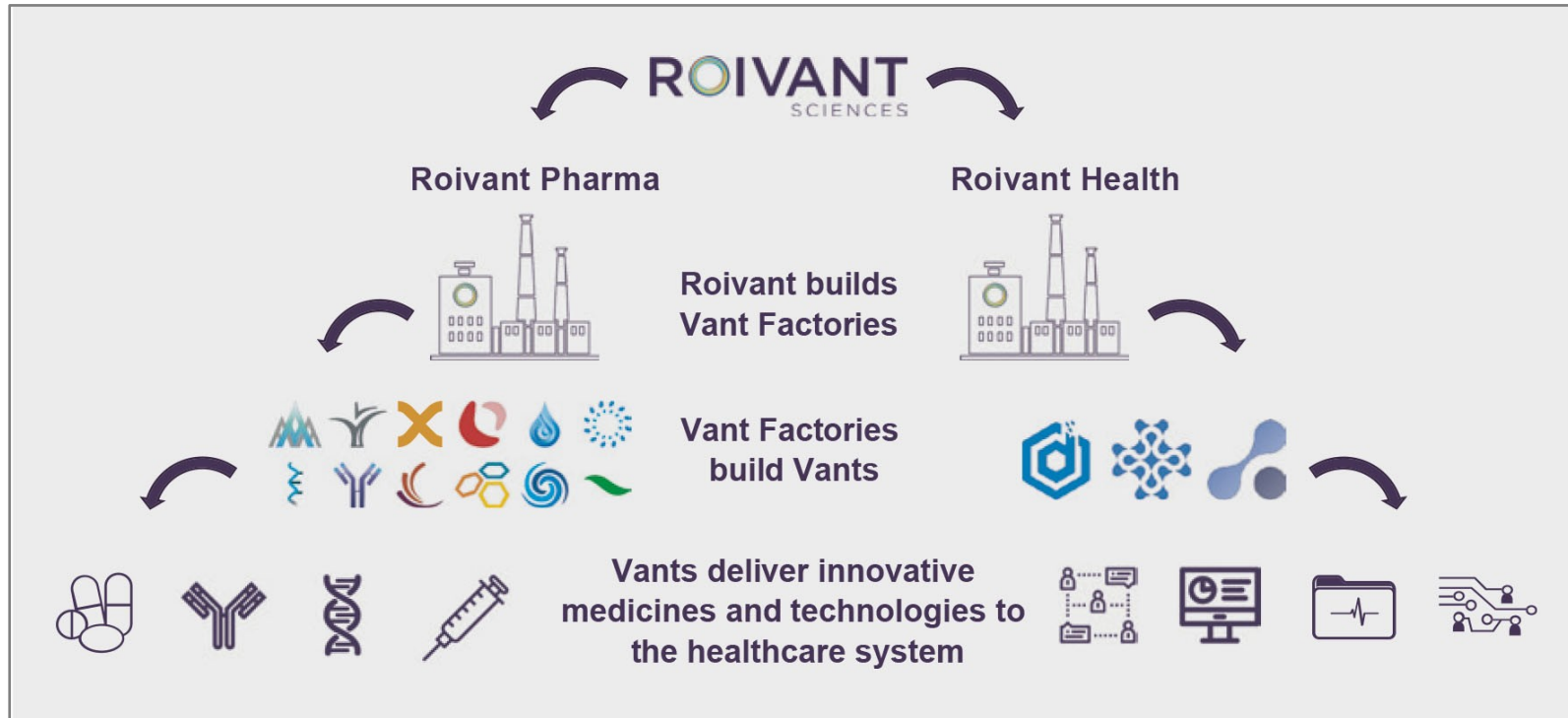
Source: scienceindustries/Federal Customs Administration 2019

Since 2007 Venture Kick invested CHF 3.16 million in 48 Swiss biotech startups. This amount was amplified 159 fold by grants and VC investments.

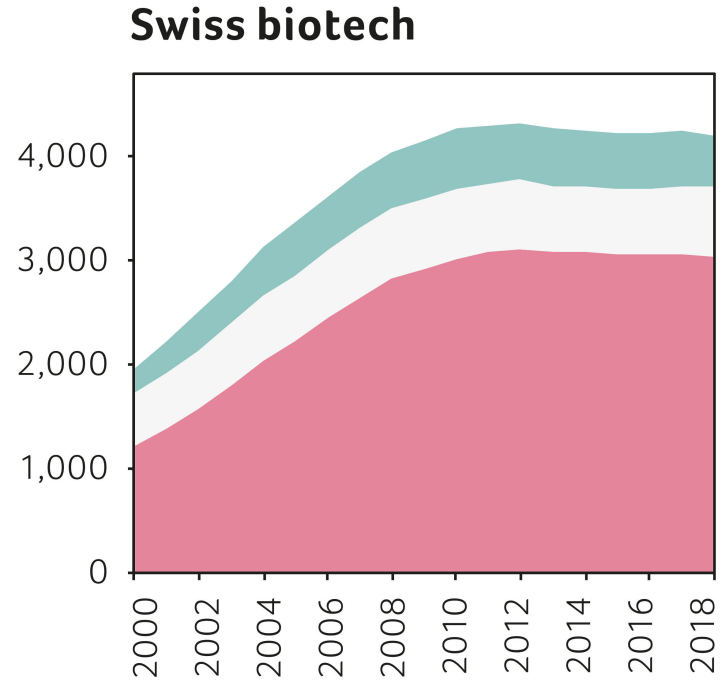
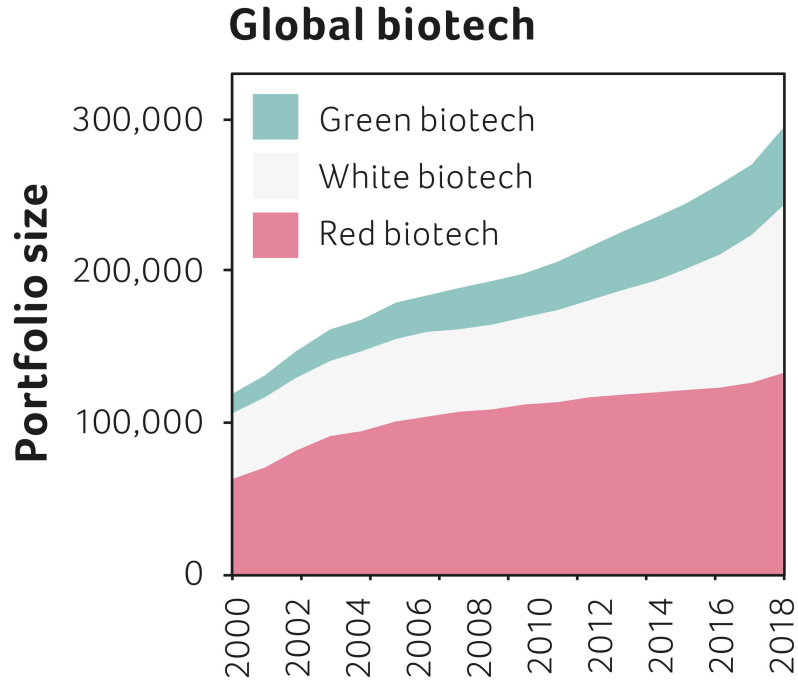


Source: Venture Kick

Roivant's new model

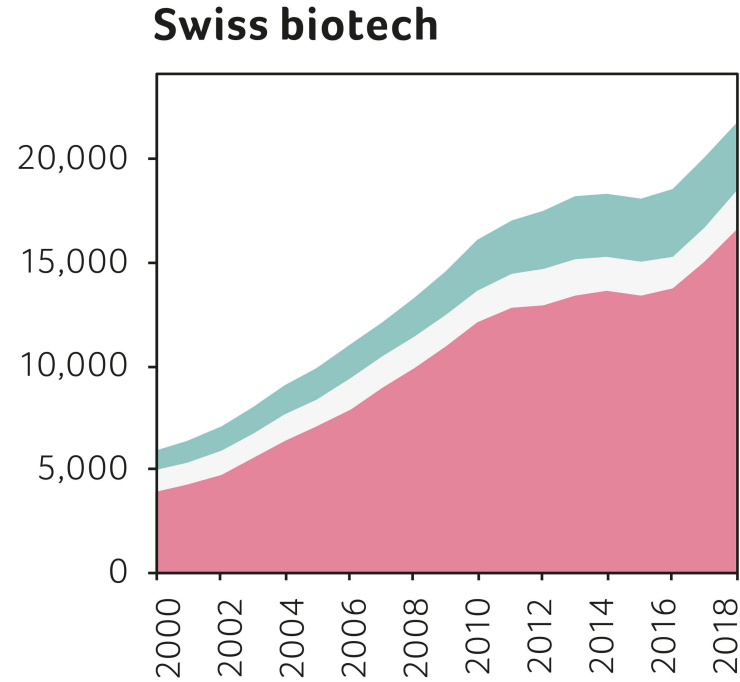
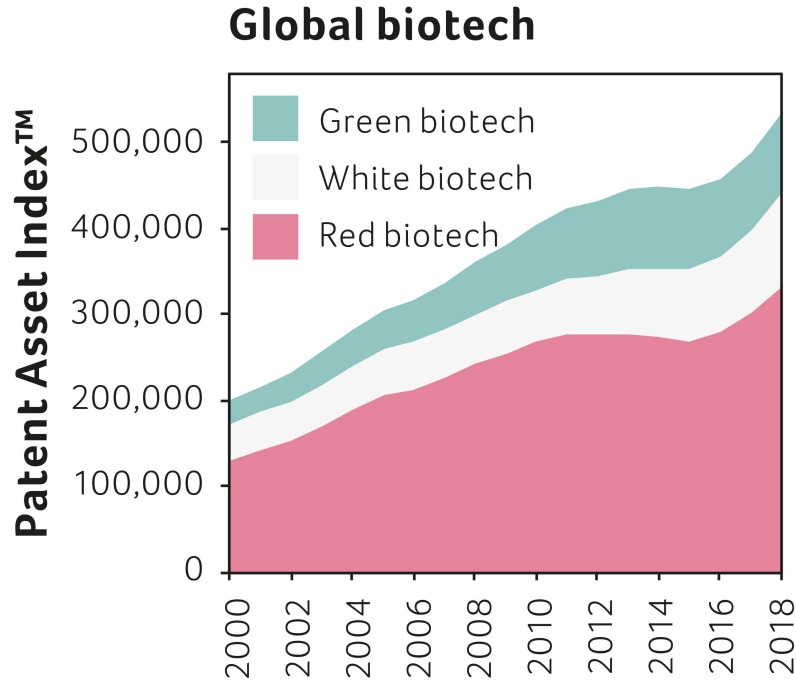


Patent portfolio size from 2000 to 2018



Source: IPI

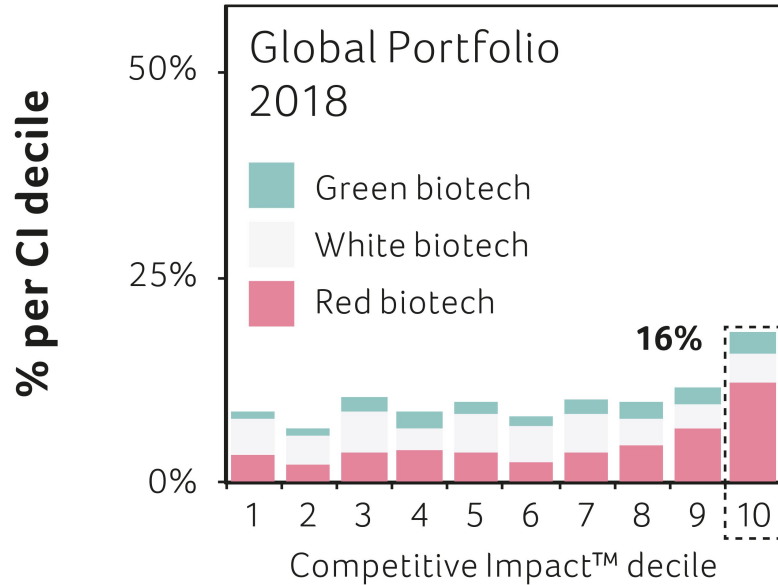
Patent Asset Index™ from 2000 to 2018



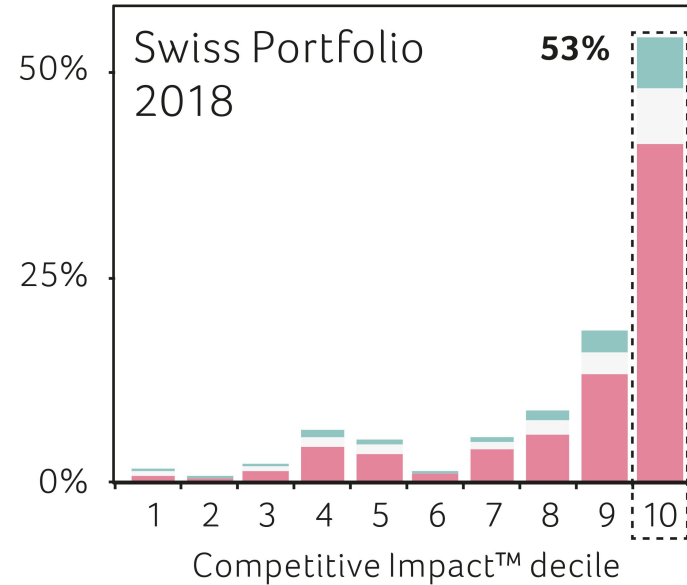
Source: IPI

Competitive Impact™ profiles

Global biotech

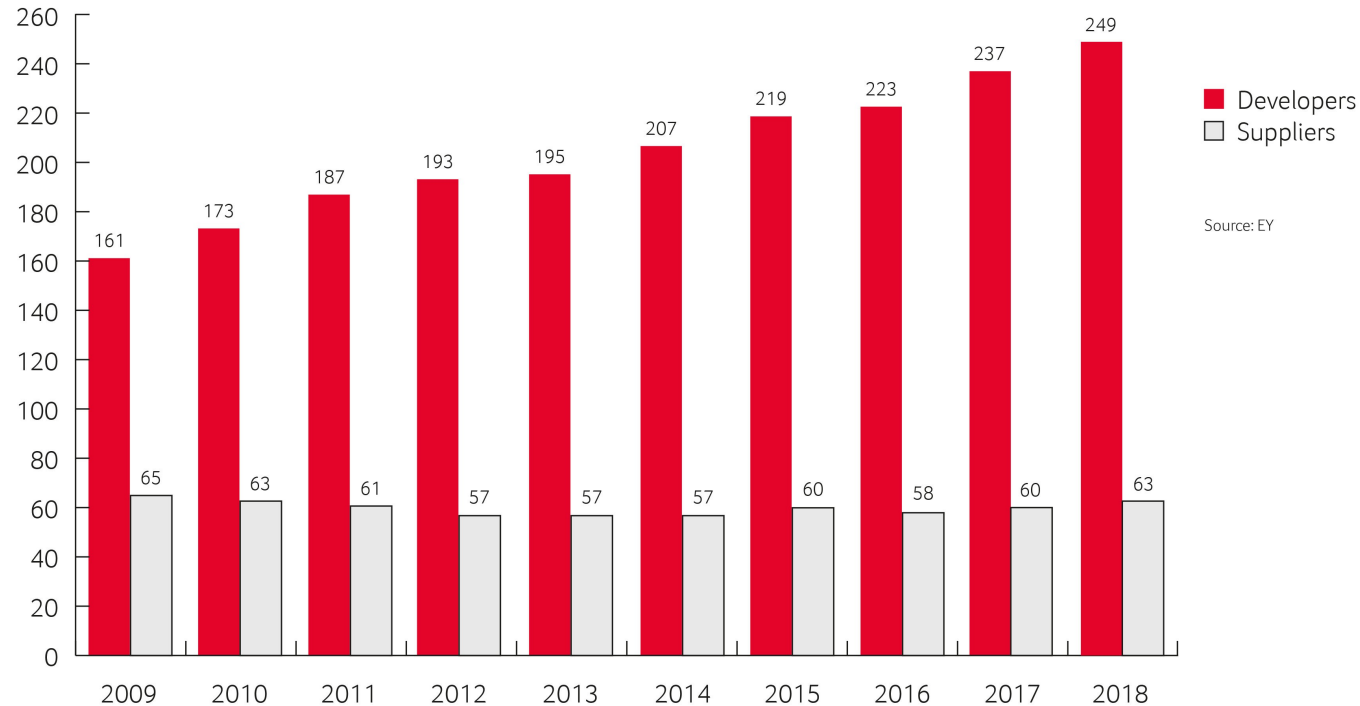


Swiss biotech

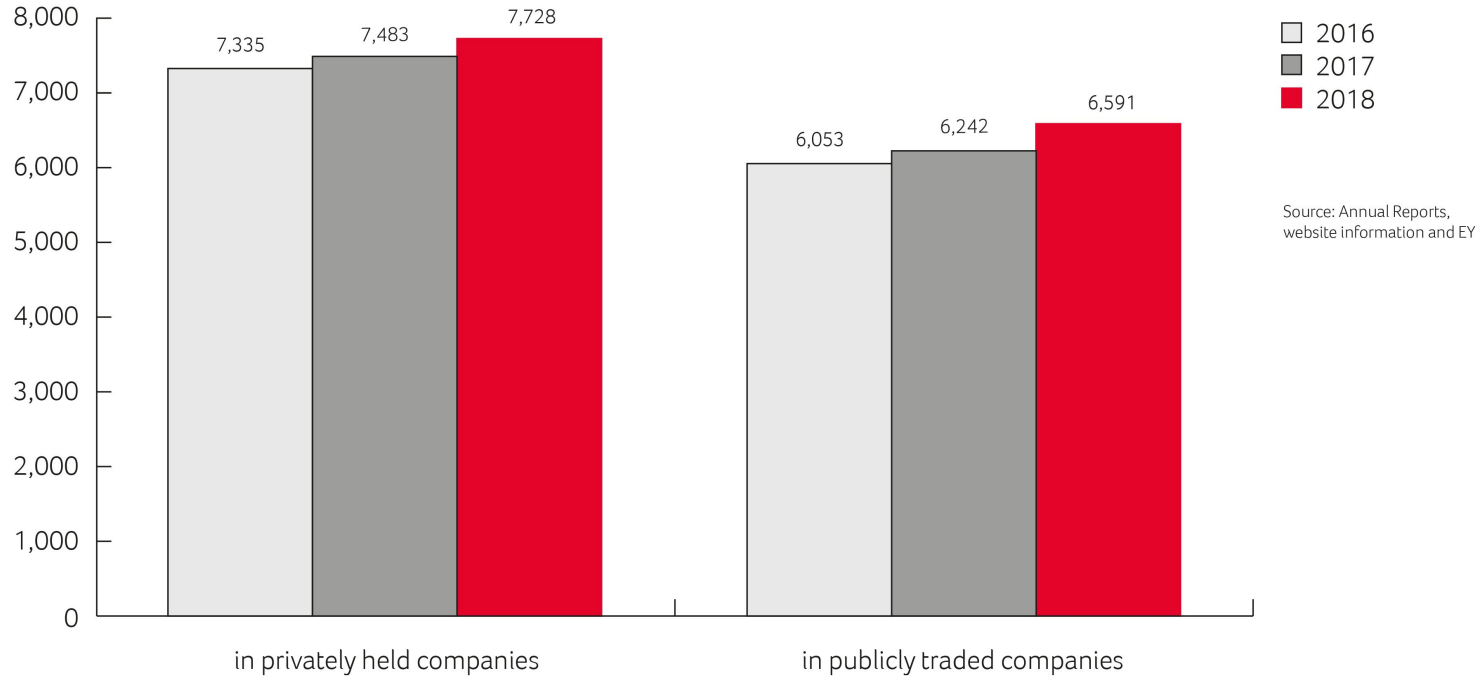


Source: IPI

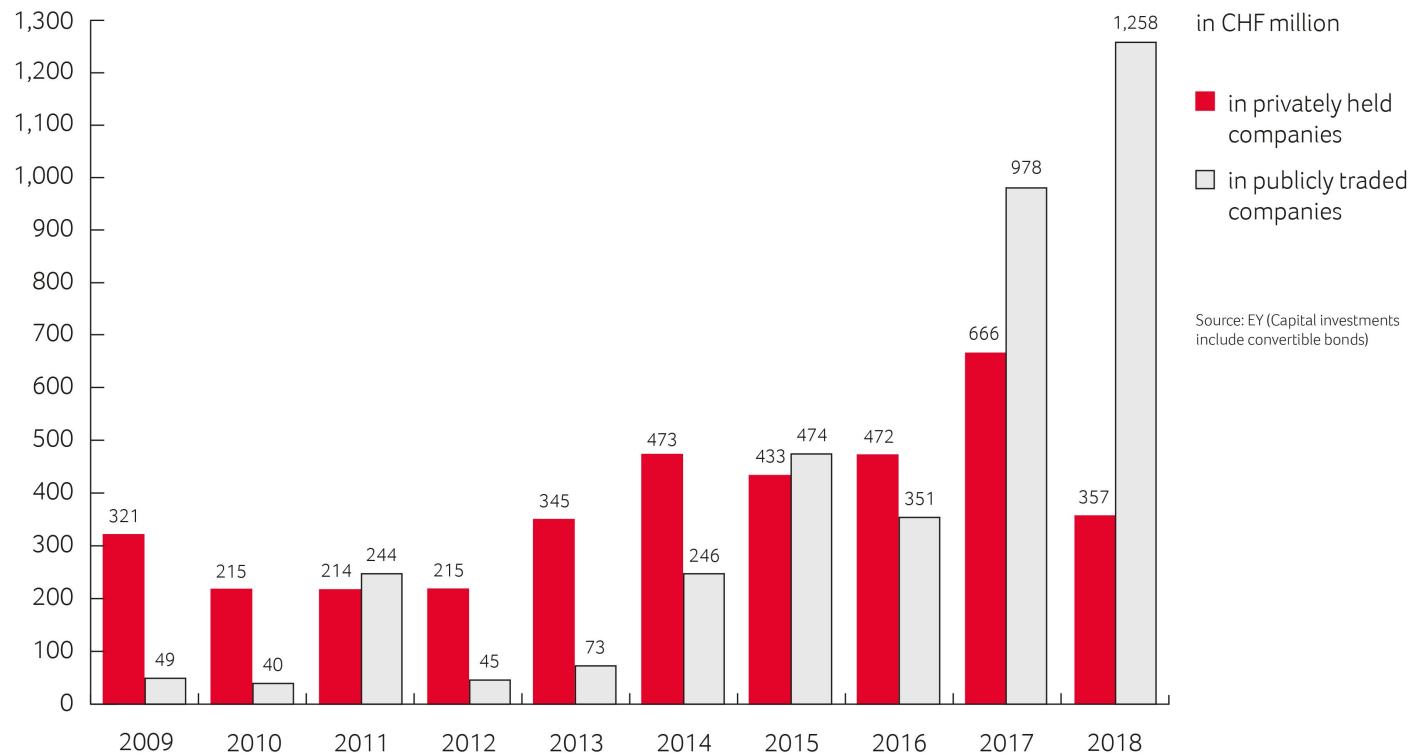
Number of biotech companies in Switzerland



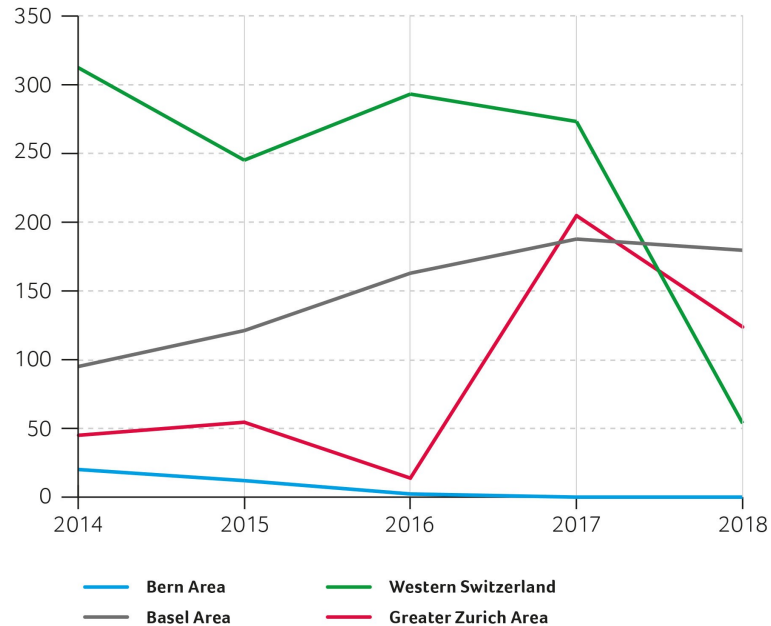
Number of employees



Capital investment in Swiss biotech companies

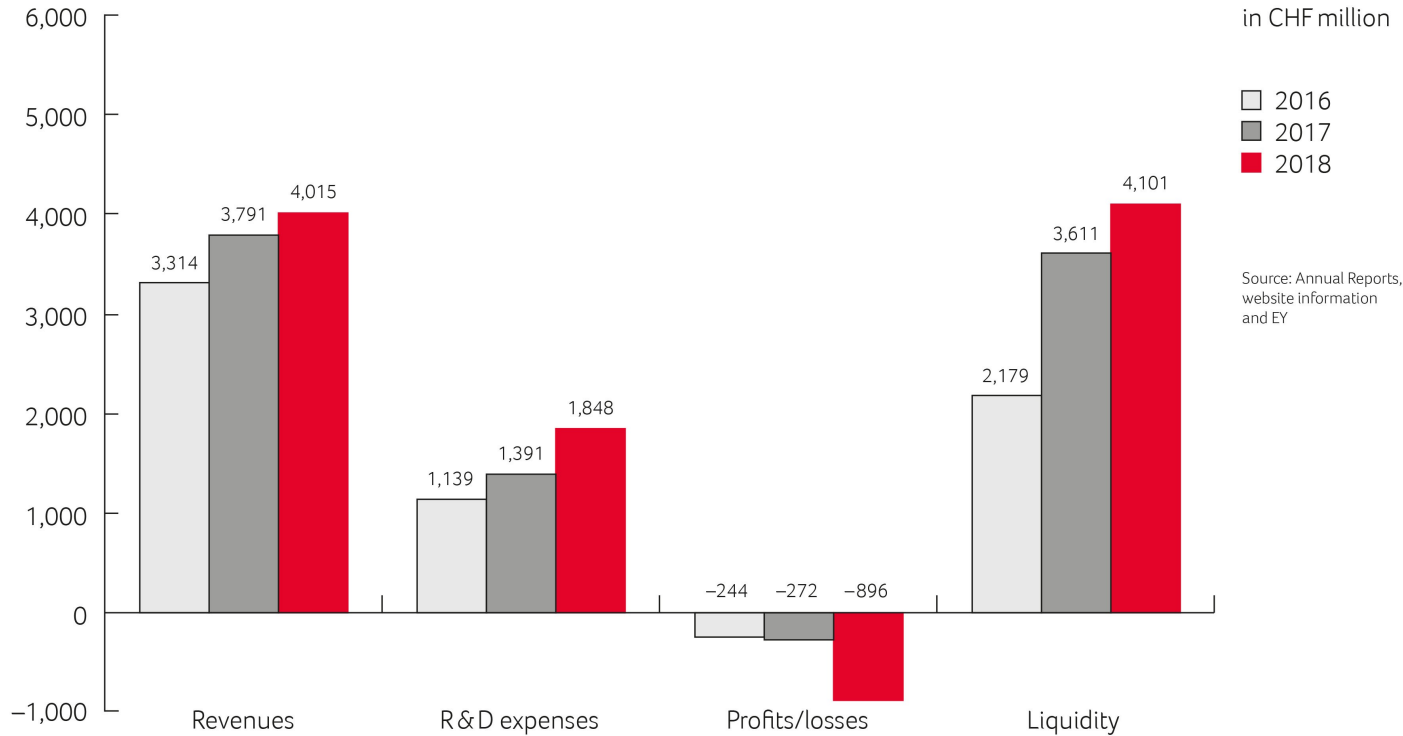


Distribution of private and public capital investments in the different Swiss regions (in CHF million)

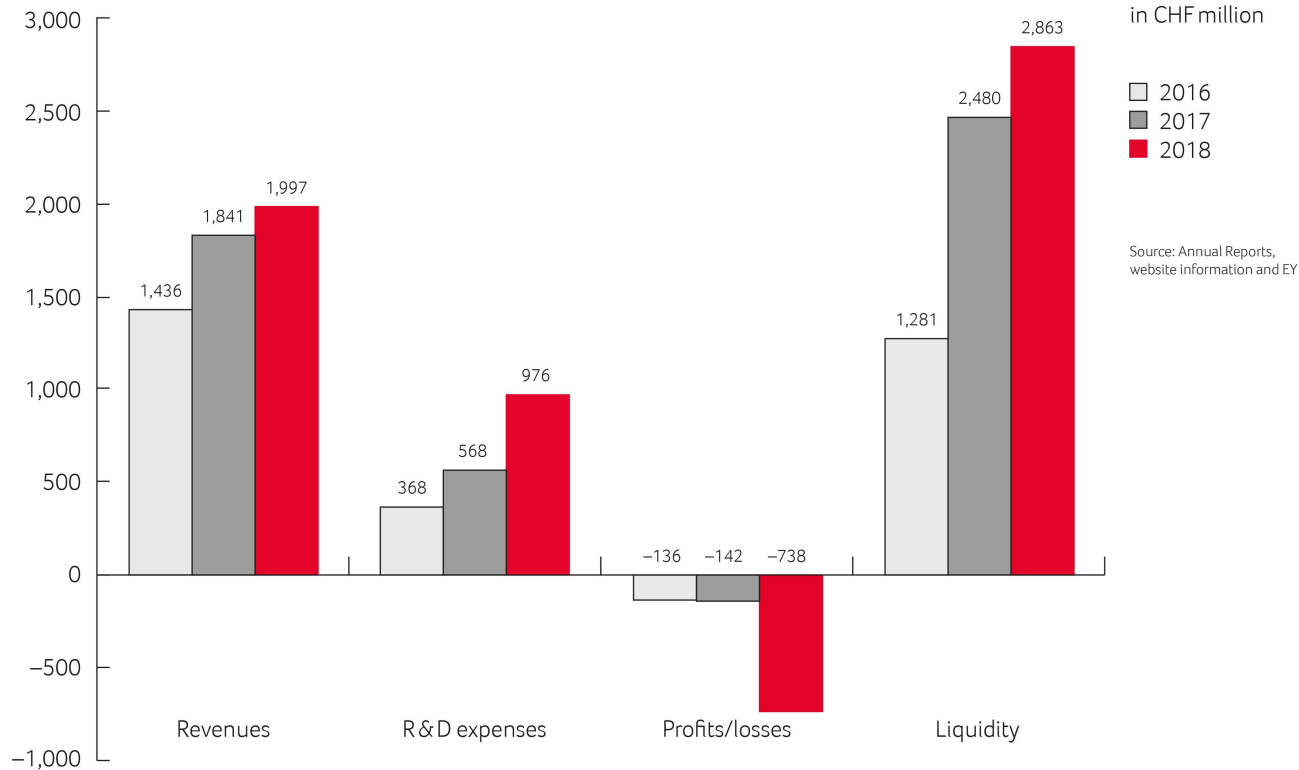


Source: EY

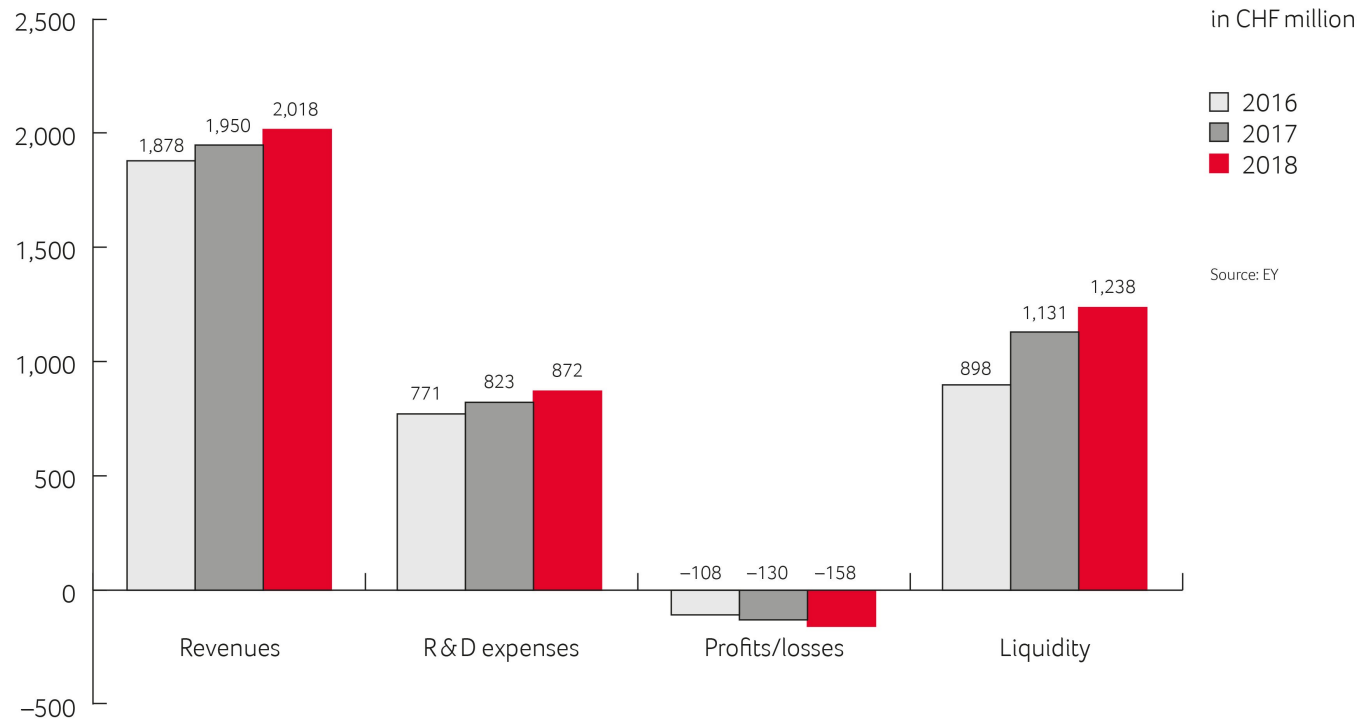
Total Swiss biotech companies



Publicly traded Swiss biotech companies



Privately held Swiss biotech companies





Follow-up Slides - IPI

Exemplary portfolio growth profiles



The overall picture in biotech: exponential growth at global scale Swiss portfolio constant since 2010

Consequence: Swiss share of global portfolio is decreasing

Established technology field, Growth of Swiss portfolio exceeds global rate

Consequence: Swiss share is increasing

Emerging technology field with Swiss participation

Consequence: Swiss share remains stable

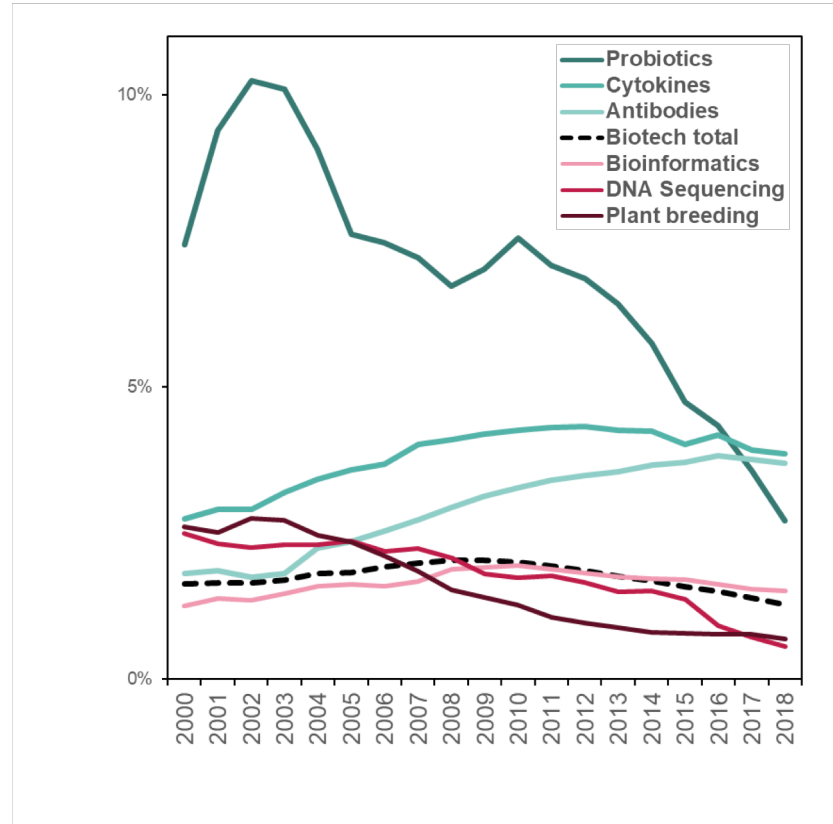
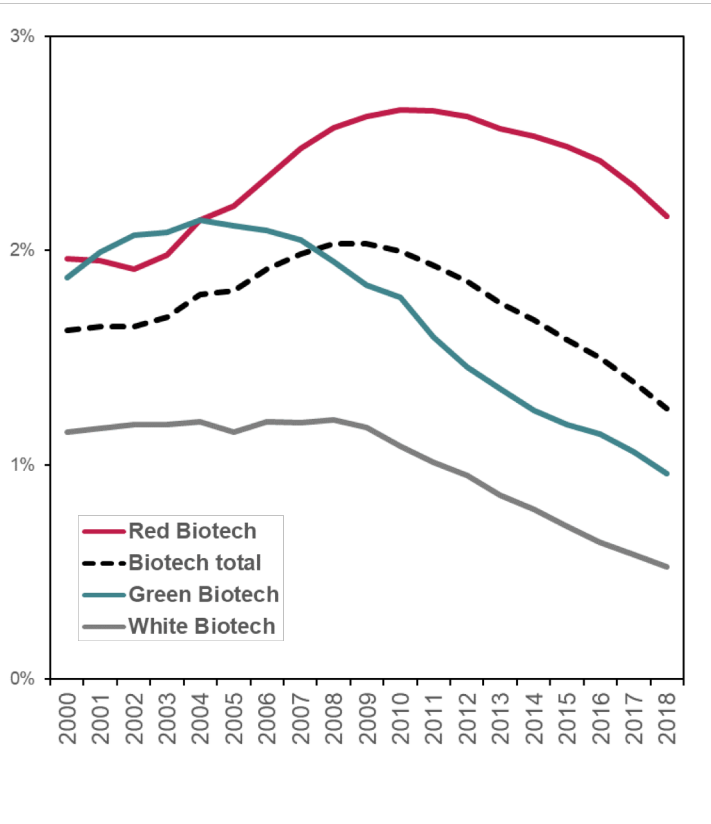
Emerging technology field with little Swiss participation

Consequence: Swiss share shrinking rapidly

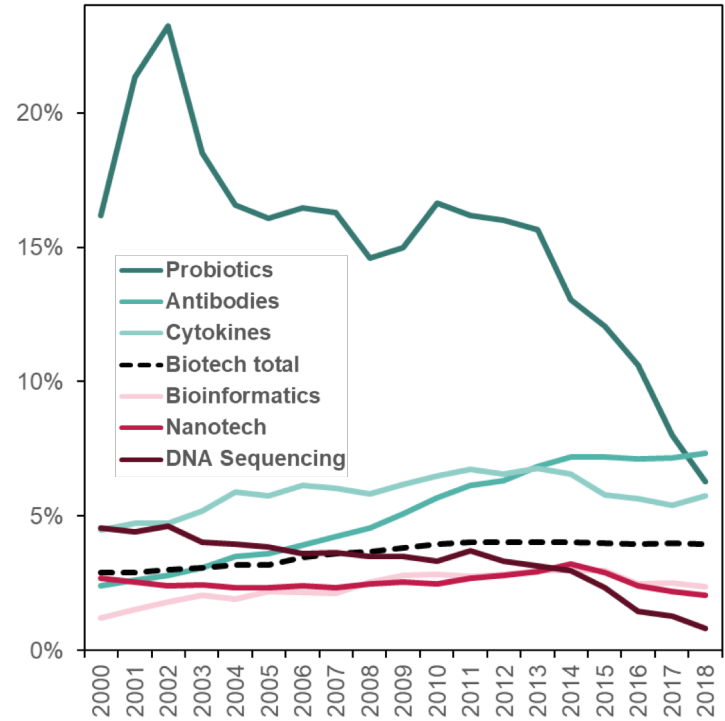
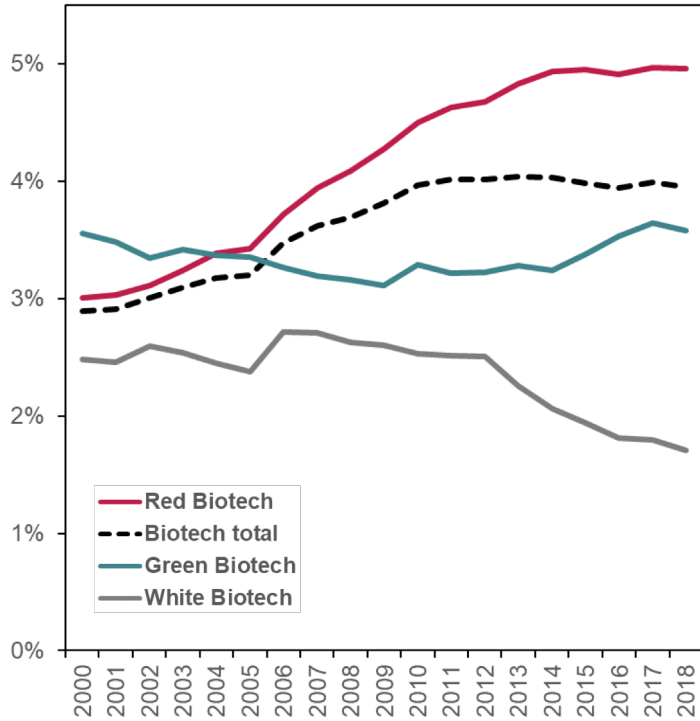
Swiss portfolio size

Source: IPI

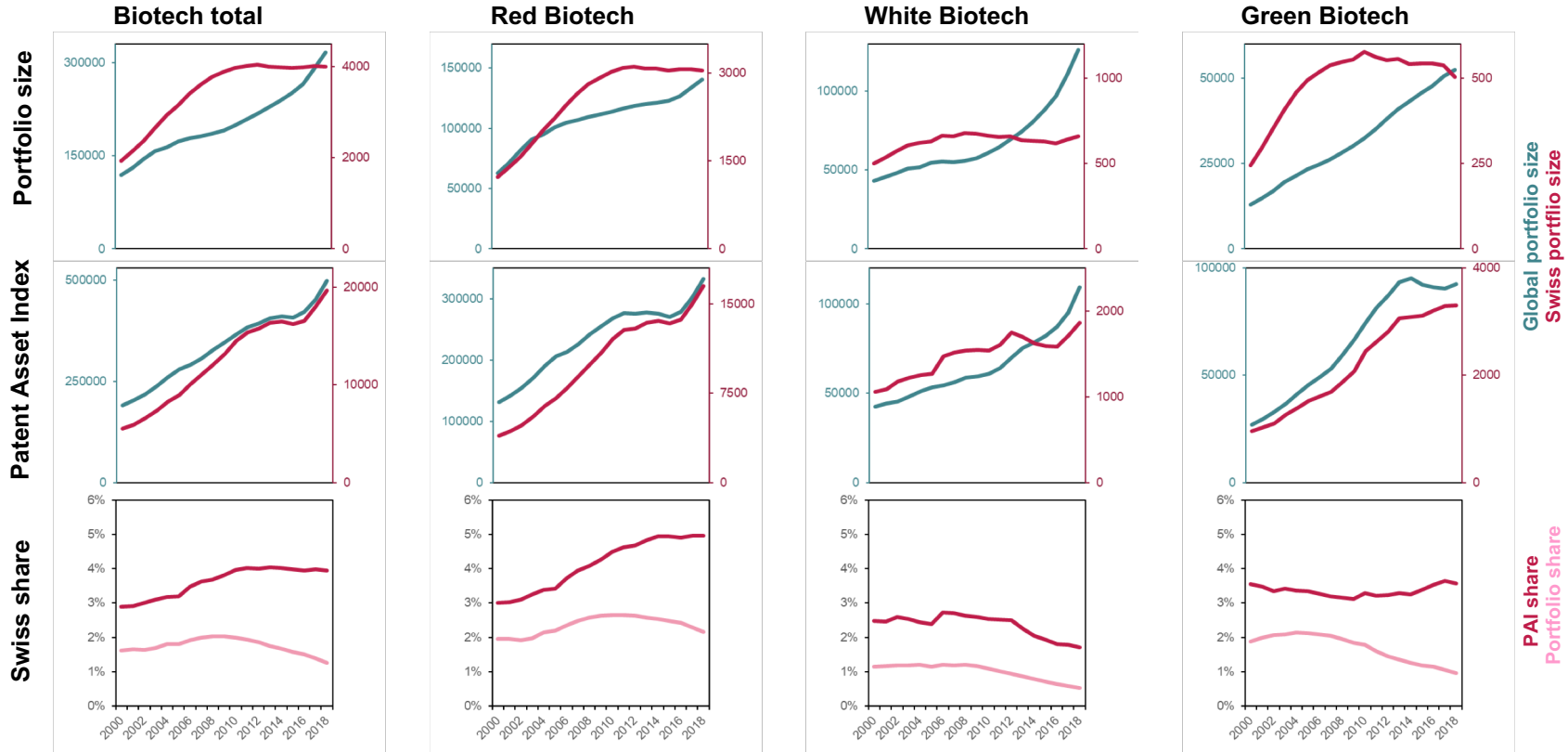
Swiss share of global portfolio sizes



Swiss share of global portfolio values by Patent Asset Index™

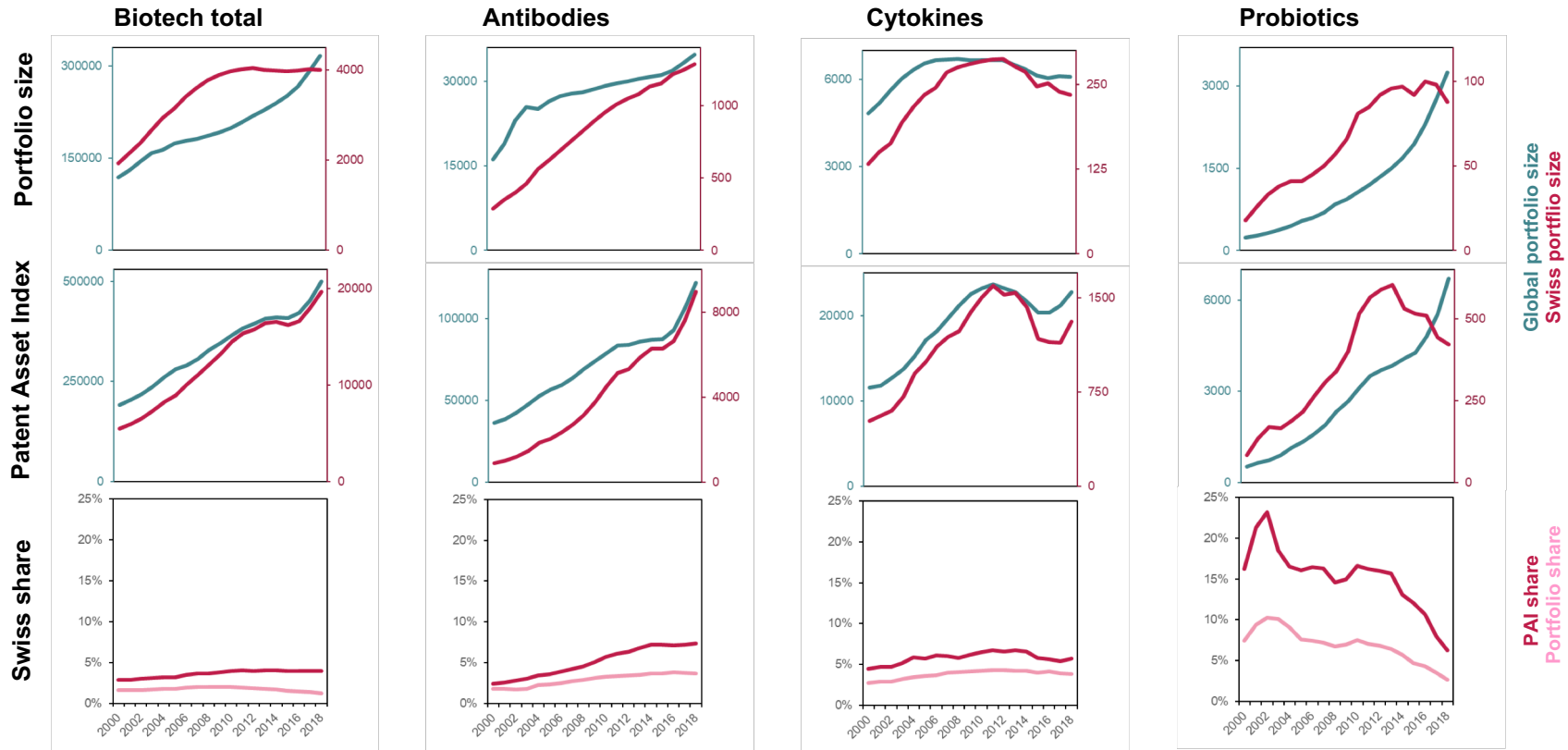


Overview on portfolio development in biotech areas



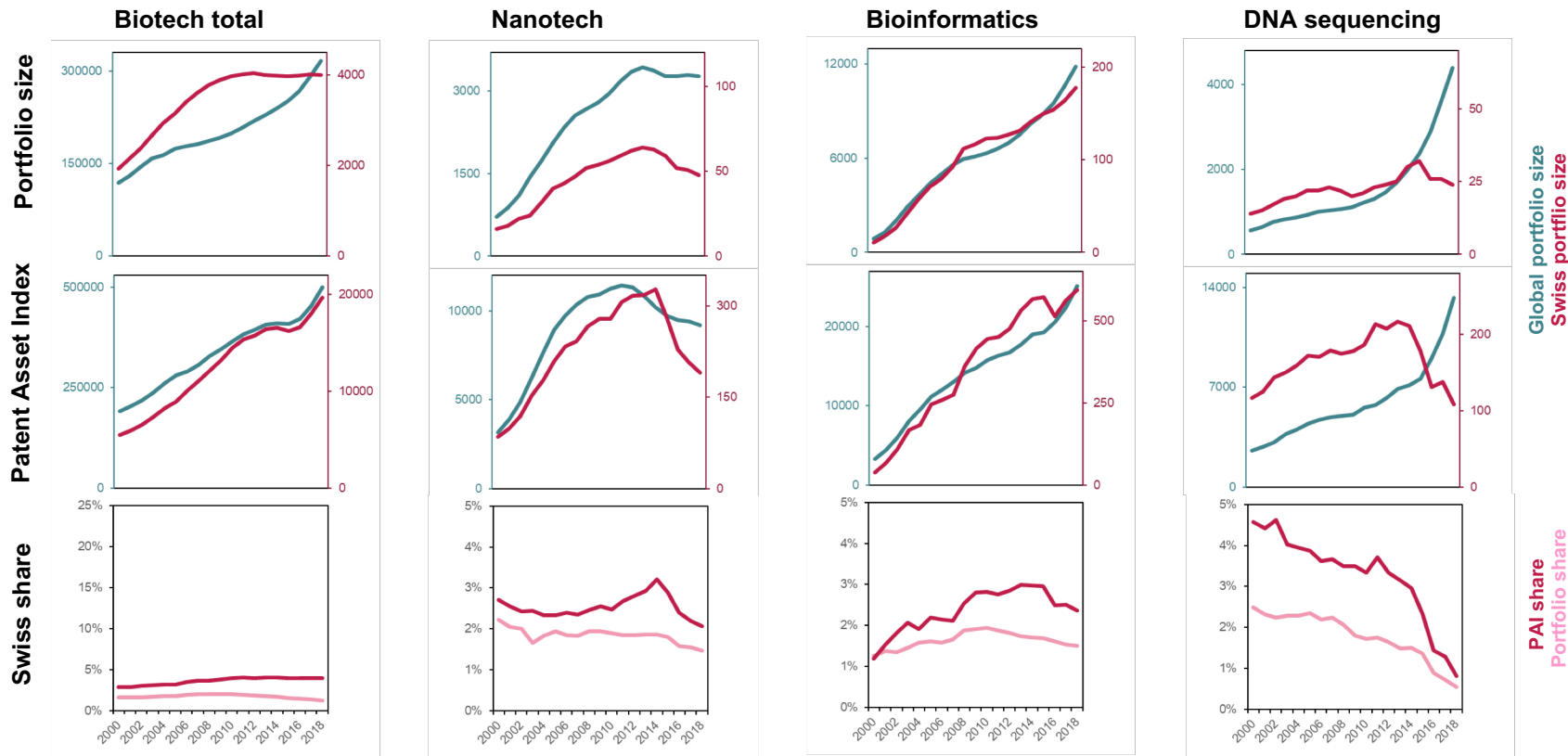
Source: IPI

Overview on portfolios in specific biotech areas - 1



Source: IPI

Overview on portfolios in specific biotech areas - 2



Source: IPI