

LIFE SCIENCE TREND ANALYSIS

CANADA | 2020



17/07/2020

ABOUT US



The following statistical information has been obtained from Biotechgate. Biotechgate is a global, comprehensive, Life Sciences database encompassing the Biotechnology, Pharmaceutical and Medical Device industries.
www.biotechgate.com



The Canadian Life Sciences Database is a part of the global Biotechgate and is brought to you in partnership with BIOTECCanada, BioAlberta, and Montréal InVivo.
www.canadianlifesciences.com

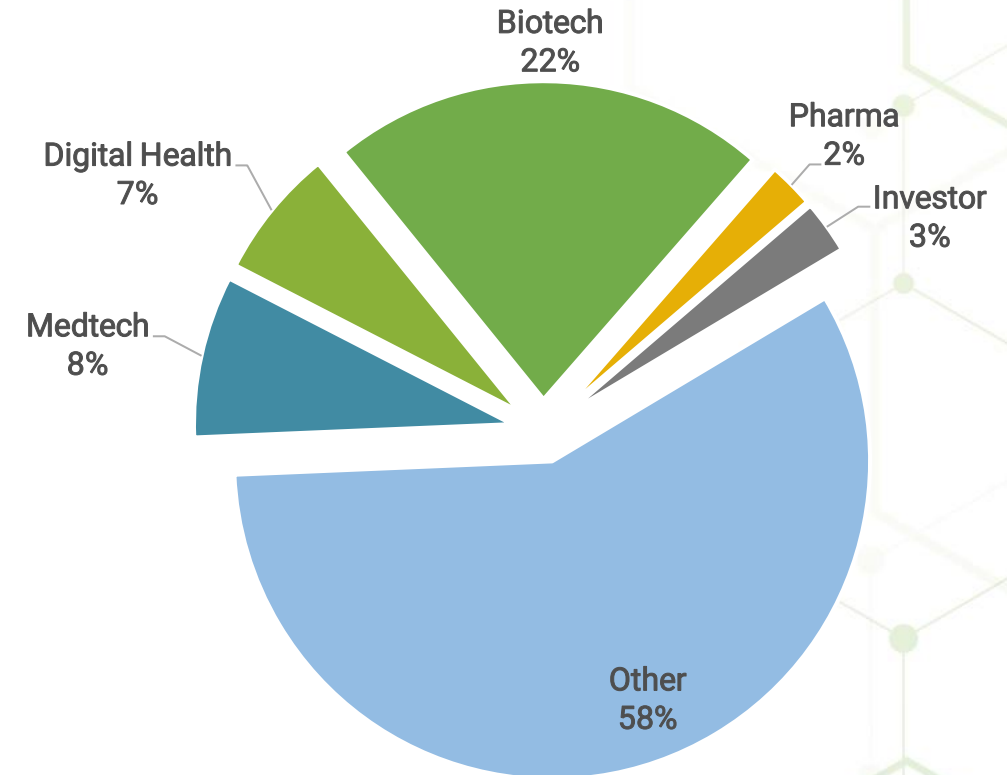


Biotechgate is owned and operated by Venture Valuation AG, a Zurich based company specializing in independent assessment and valuation of technology-driven companies in high growth industries, such as the Life Sciences (Biotech, Pharma, Medtech), ICT, high-tech, Nanotech, Cleantech and Renewable energy.
www.venturevaluation.com



OVERVIEW OF THE LIFE SCIENCE INDUSTRY

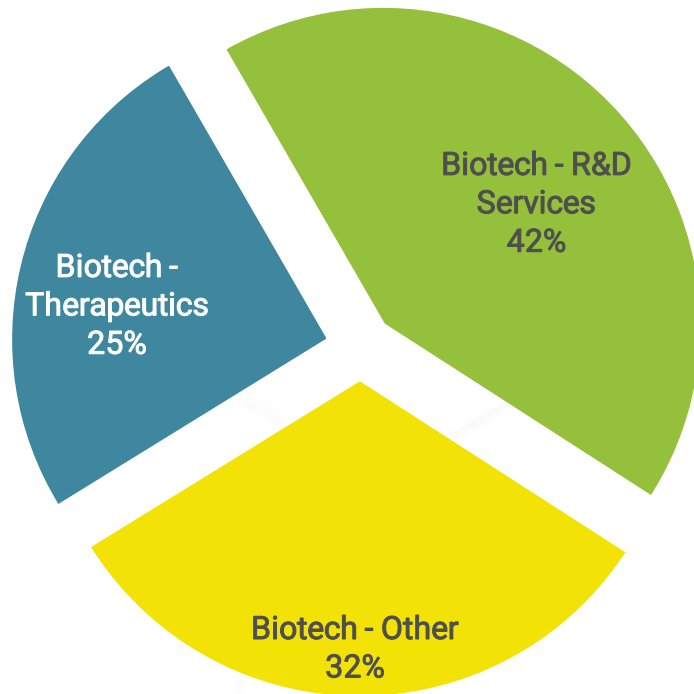
NUMBER OF COMPANIES BY SECTOR



For the definition of categories please visit www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html. Biotech Companies include the following categories: Biotechnology – Therapeutics and Diagnostics; Biotechnology – R&D; Biotechnology – Others. Percentage value is expressed as % of total number of companies. Information displayed may alter as new information is received continuously.

OVERVIEW OF BIOTECH COMPANIES

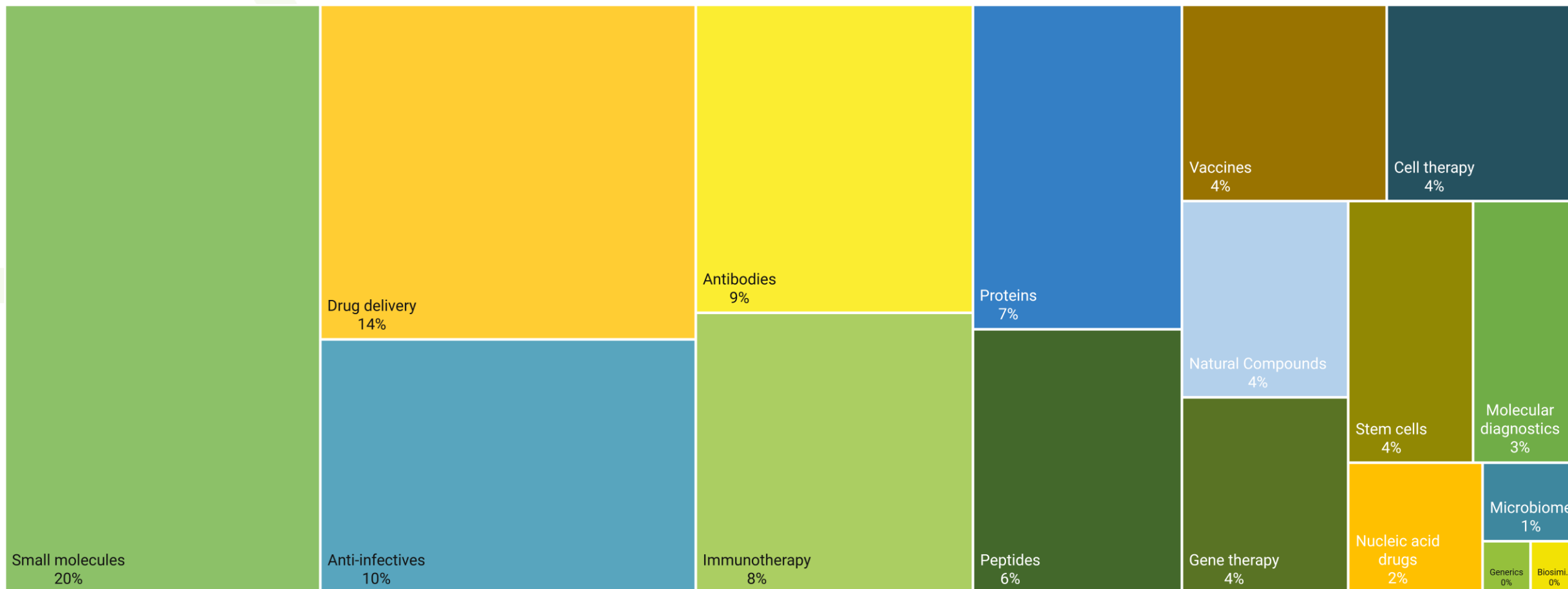
NUMBER OF COMPANIES BY SECTOR



For the definition of categories please visit www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html. Biotech Therapeutics category equals to Biotech Therapeutics and Diagnostics. Percentage value is expressed as % of total number of biotechnology companies including Biotech - Therapeutics and Diagnostics, Biotech - R&D Services and Biotech - Others. Information displayed may alter as new information is received continuously.

BIOTECH - THERAPEUTICS COMPANIES BY KEY ACTIVITIES

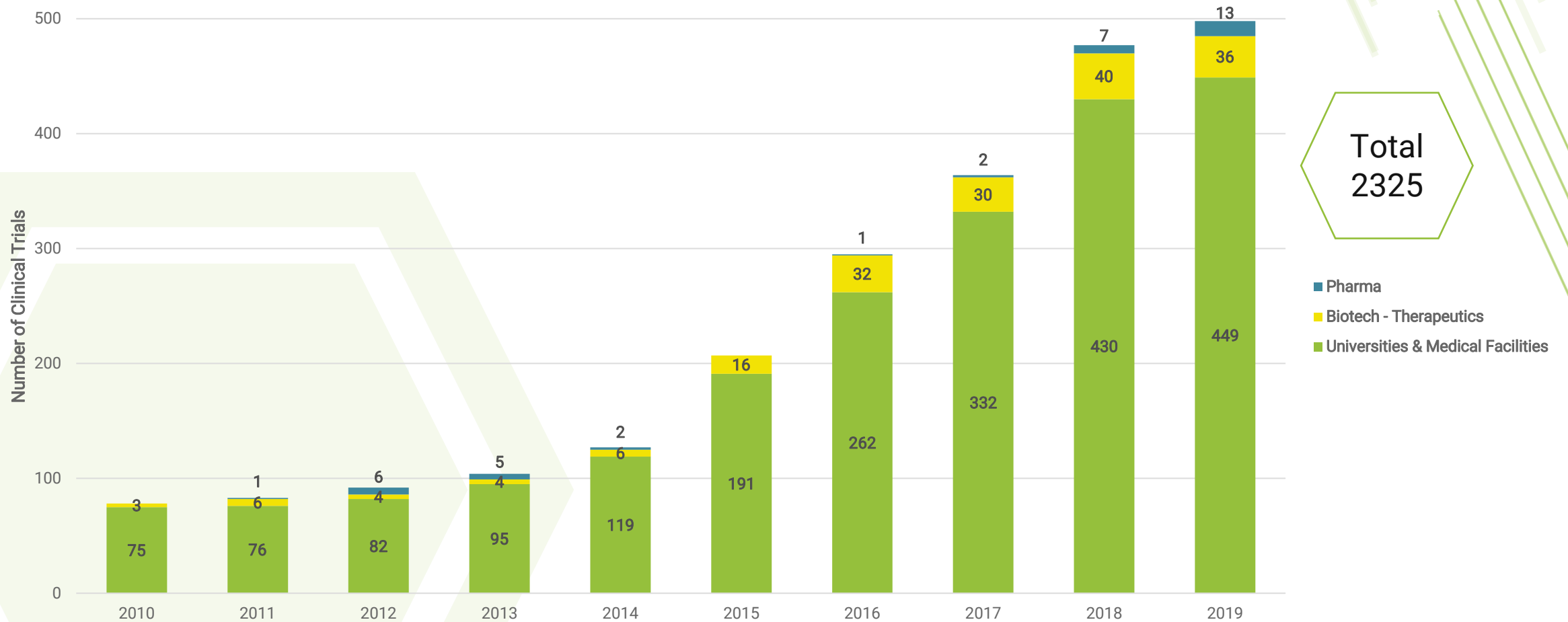
AS PERCENTAGE OF TOTAL NUMBER OF BIOTECH - THERAPEUTICS COMPANIES



For 261 Biotech Therapeutics companies there were 369 subsectors (key activity areas) assigned (one biotech company can be active in multiple areas). The graph displays Biotech – Therapeutics and Diagnostics subsectors as the percentage of the total number of Biotech – Therapeutics and Diagnostics subsectors with exclusion of the category Others. The company subsectors are regarded as the key activities of a company. For the definition of subsectors please visit www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html. Information displayed may alter as new information is received continuously.

CLINICAL TRIAL TIMELINE BY CANADIAN ORGANIZATIONS

NUMBER OF CLINICAL TRIALS REGISTERED BY SECTOR AND BY YEAR | 2010-2019

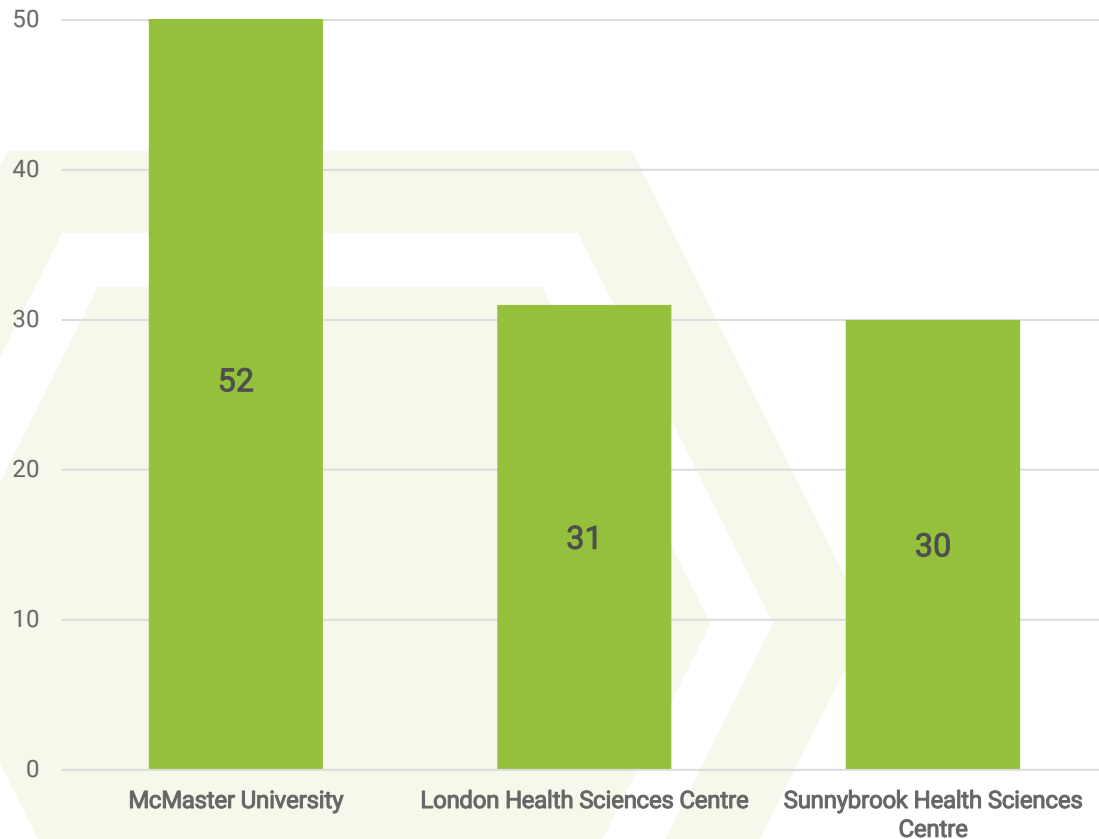


The charts include clinical trials conducted by companies categorized as Biotechnology – Therapeutics and Diagnostics, Pharma and Public / Non-profit organizations / Medical Facilities, which were sponsored by Canadian organizations. The category of Universities & Medical facilities is equivalent to the category of Public / Non-profit organizations / Medical Facilities and the category of Biotech – Therapeutics is equivalent to the Biotech – Therapeutics and Diagnostics.

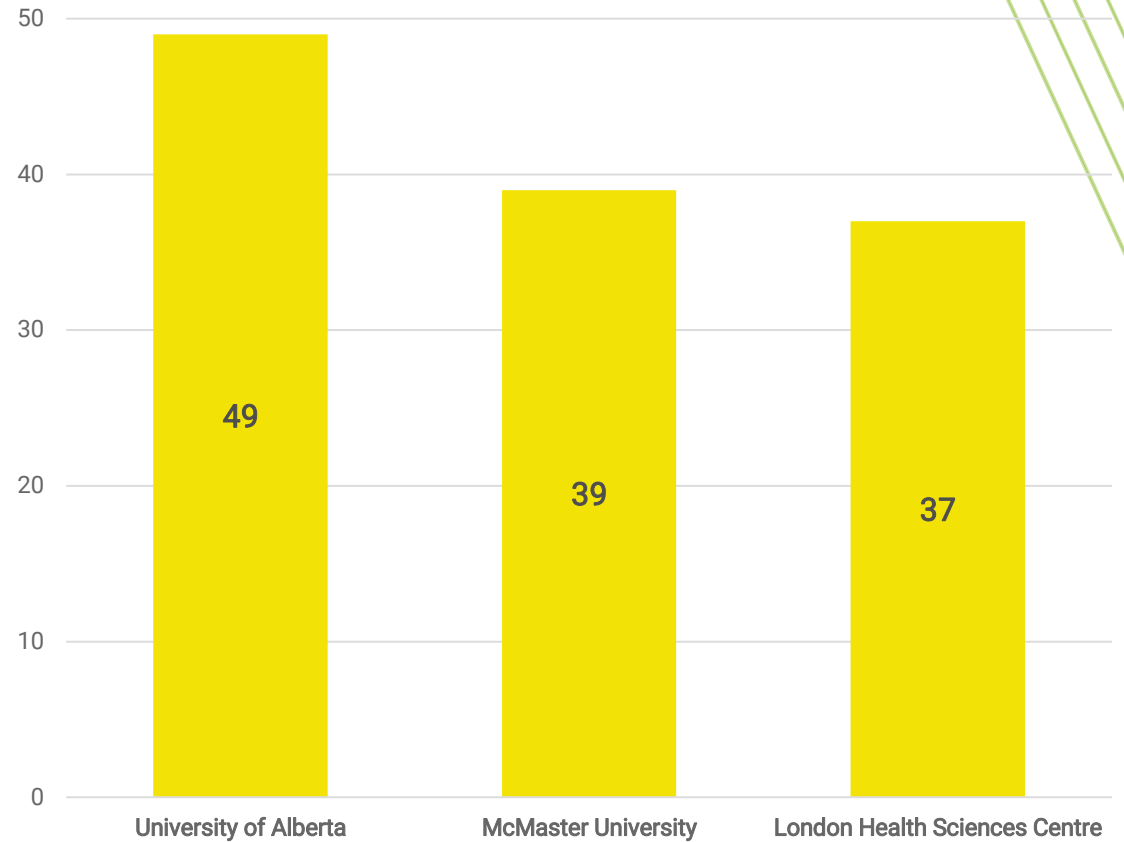
MAJOR SPONSORS OF CLINICAL TRIALS

BY NUMBER OF CLINICAL TRIALS SPONSORED BY CANADIAN ORGANIZATIONS | 2018-2019

TOP 3 SPONSORS IN 2018



TOP 3 SPONSORS IN 2019

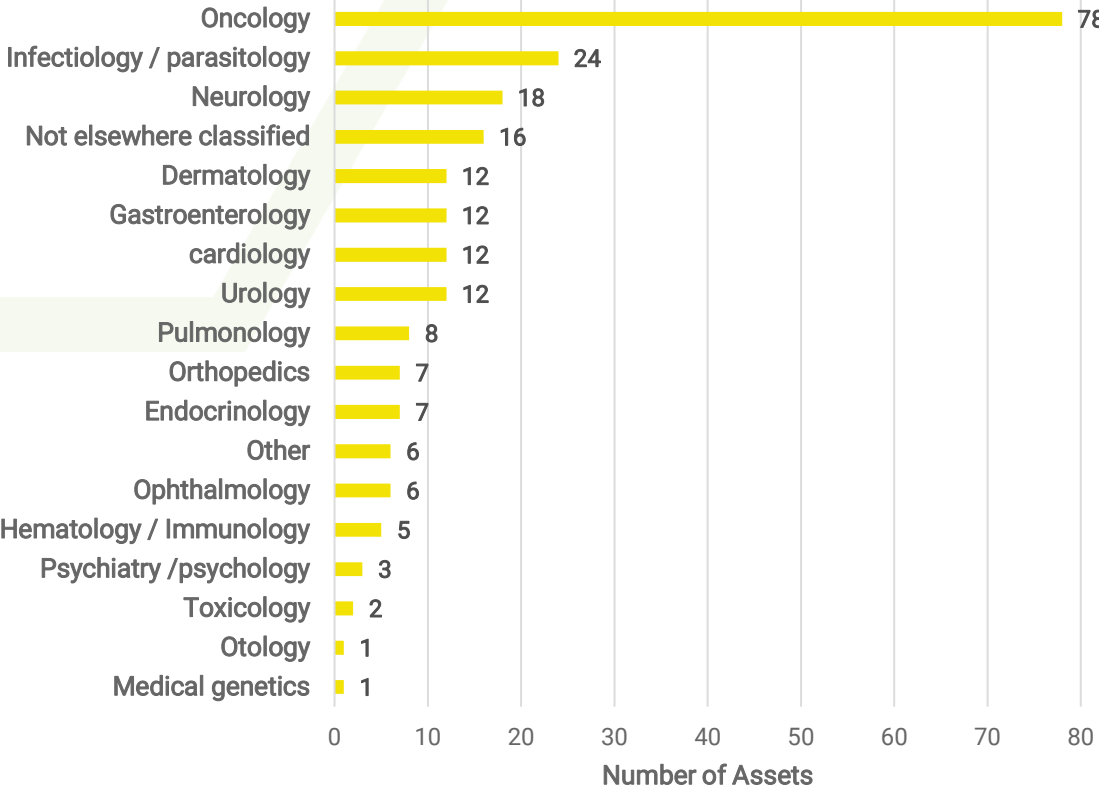


The charts display the top 3 Canadian organizations based on the number of trials registered in 2018 and 2019. This analysis regarded companies categorized either as Biotechnology – Therapeutics and Diagnostics, Pharma or Public / Non-profit organizations / Medical Facilities. Information displayed in the chart may alter as new information is received continuously.

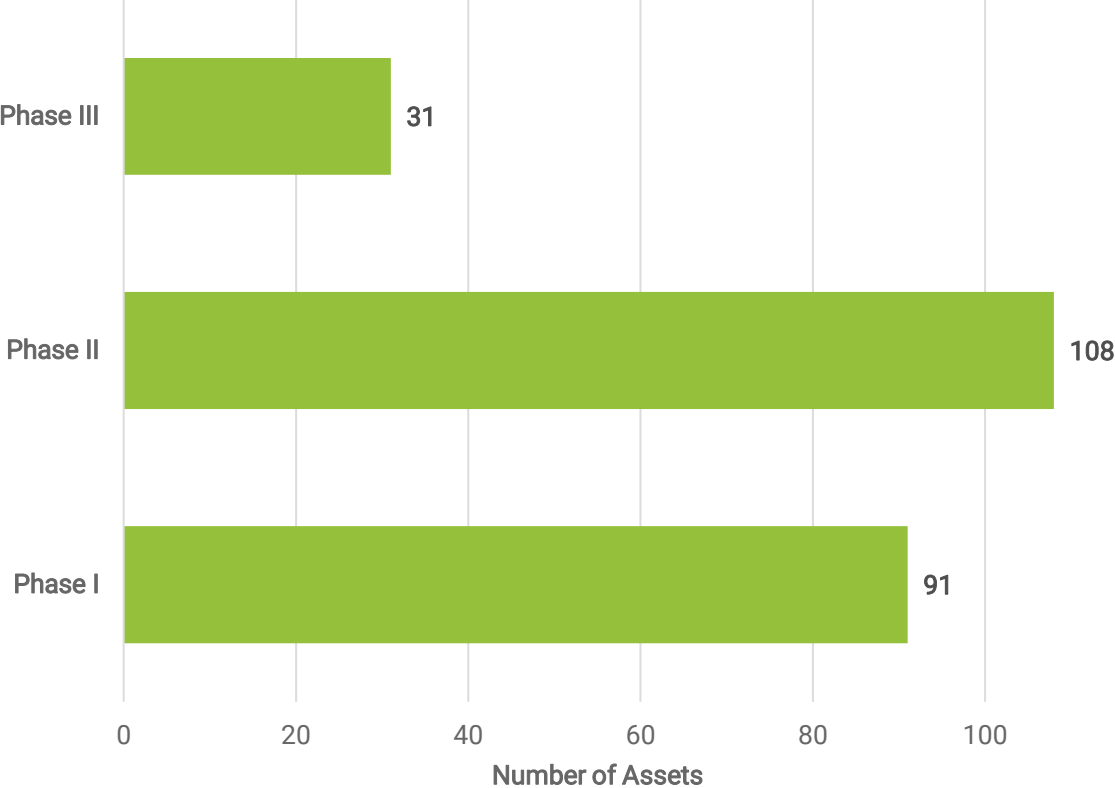
BIOTECH ASSETS IN CLINICAL DEVELOPMENT

BY INDICATION AND DEVELOPMENT PHASE

BREAKDOWN BY INDICATION



BREAKDOWN BY DEVELOPMENT PHASE

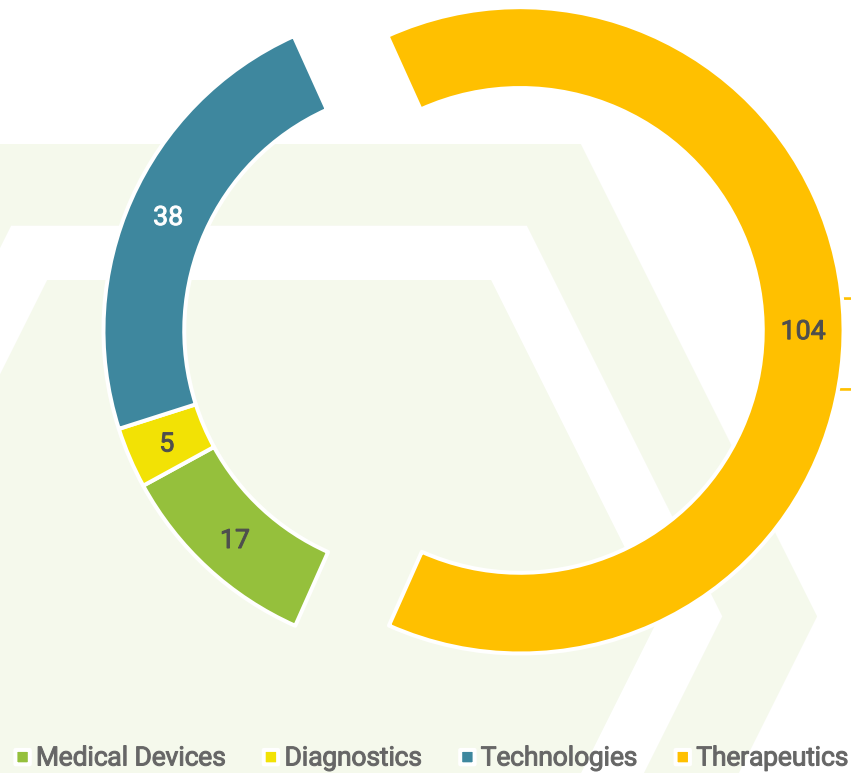


Both graphs contain the number assets of Biotech – Therapeutics and Diagnostics companies (excl. of Pharma or Biotech – Others or Biotech R&D Services companies). Phase I/II trials are merged into Phase II and Phase II/III trials are merged into Phase III category. Information displayed in the chart may alter as new information is received continuously

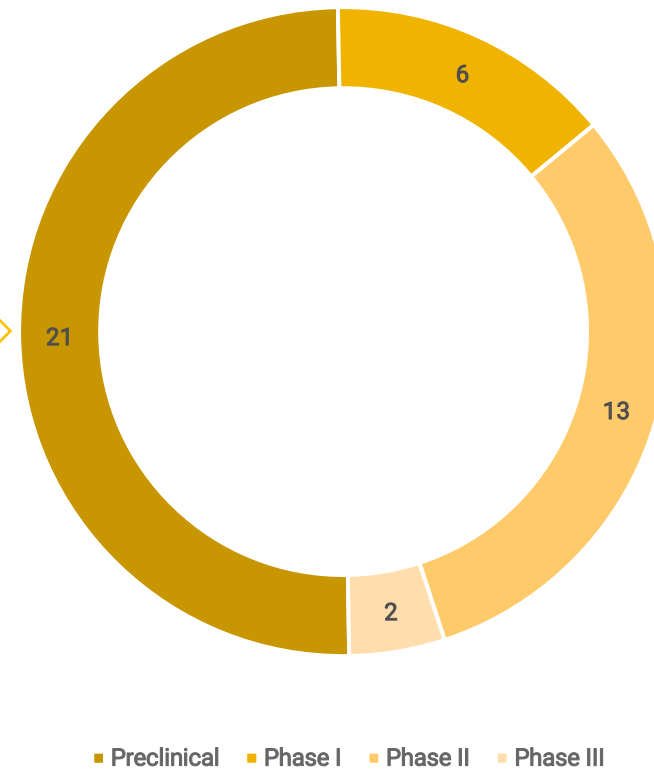
ASSETS AVAILABLE FOR OUT-LICENSING

NUMBER OF ASSETS

BY ASSET CLASS



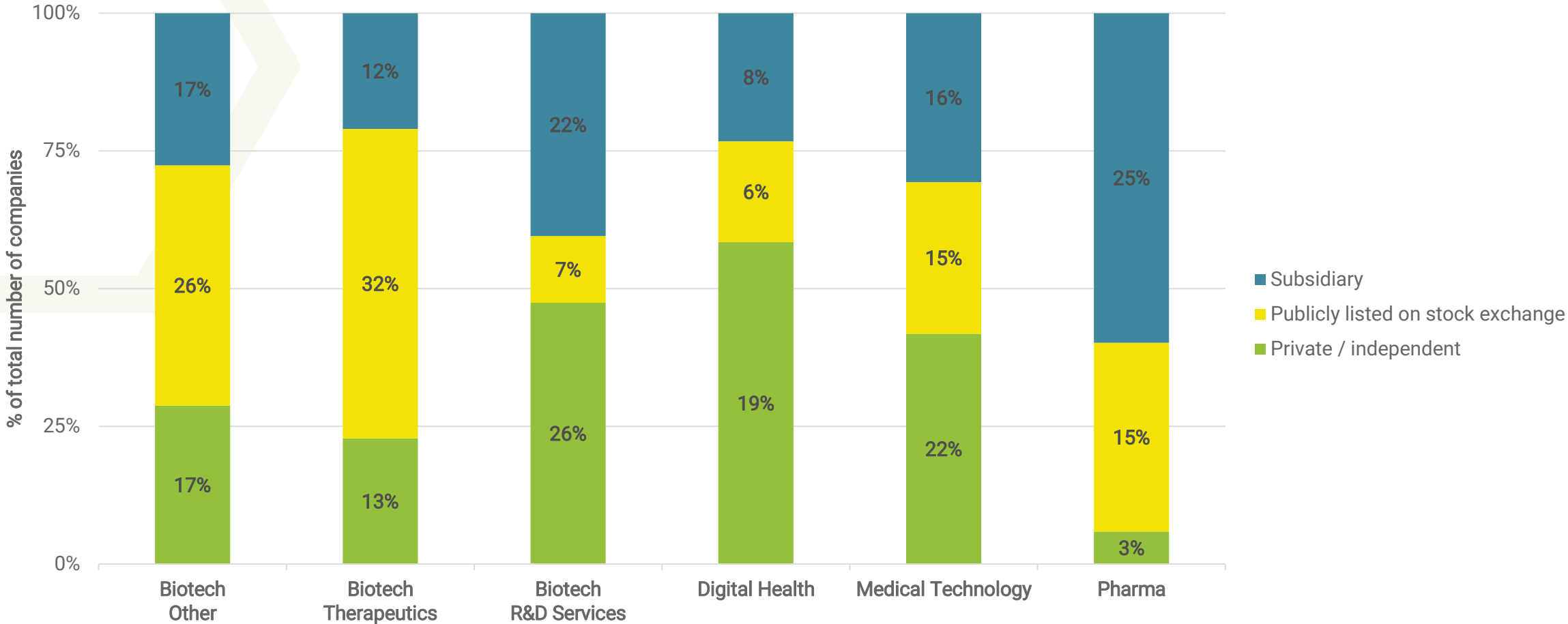
THERAPEUTICS IN DEVELOPMENT BY DEVELOPMENT PHASE



The graph titled Therapeutics in Development by Development Phase displays a subset of the asset class Therapeutics and excludes Therapeutics which are: on the market, filed, pre-filed, lead optimization, discovery or in unknown development phase. Information displayed in the chart may alter as new information is received continuously.

OVERVIEW OF OWNERSHIP

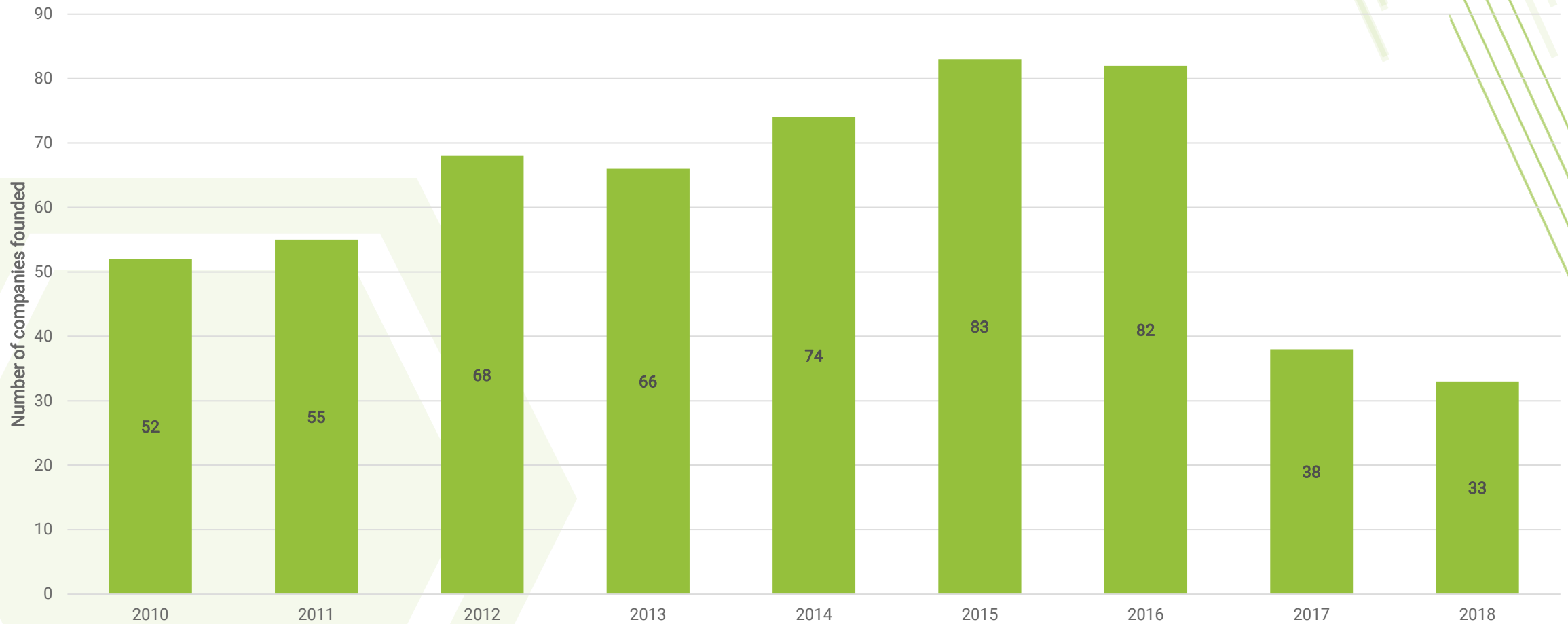
PERCENTAGE OF TOTAL NUMBER OF COMPANIES BY OWNERSHIP AND SECTOR



For the definition of categories please visit www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html. Biotech Therapeutics category corresponds to Biotech Therapeutics and Diagnostics. Percentage value is expressed as % of total number of biotechnology companies. Information displayed may alter as new information is received continuously.

COMPANY FOUNDATION TIMELINE

NUMBER OF LIFE SCIENCE COMPANIES FOUNDED BY YEAR | 2010-2018

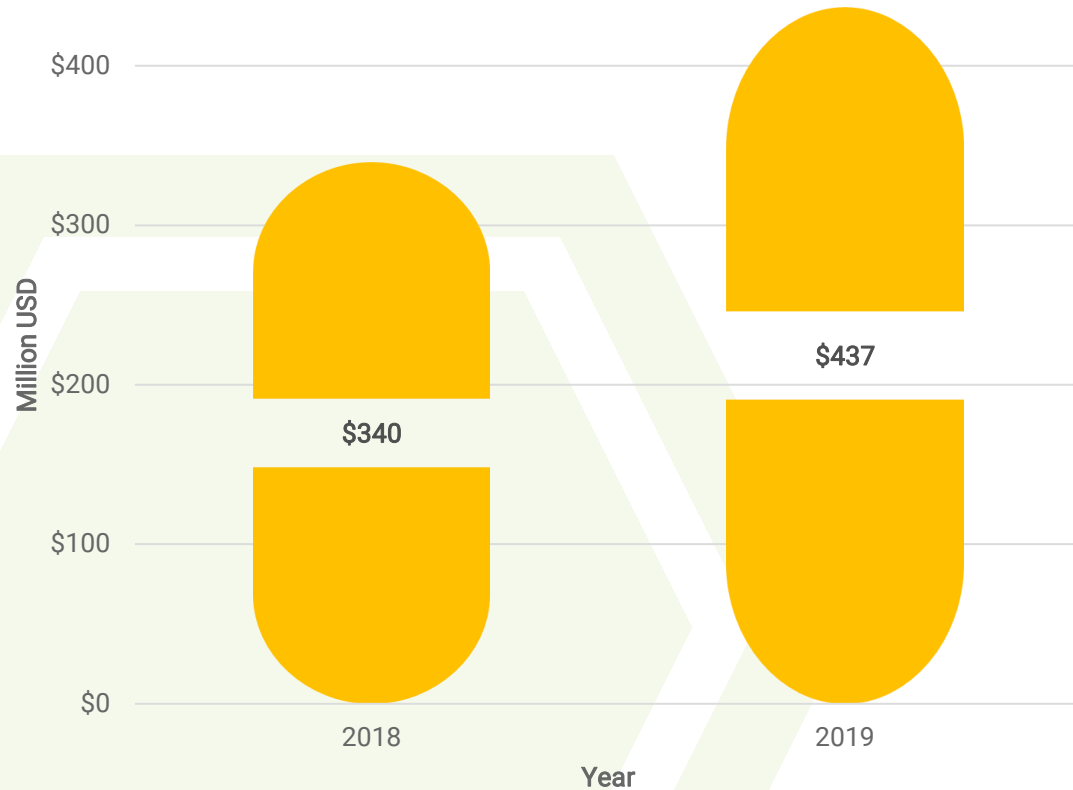


The graph contains data of the number of privately owned or publicly listed (no subsidiaries) life science companies founded by year including Biotech - Therapeutic and Diagnostic, Biotech - R&D Services, Biotech - Others, Pharma, Medical Technology and Digital Health companies. Companies founded in 2019 were excluded, since newly founded companies often remain under the radar until their first financing round, it is possible that the number of companies founded in most recent years might alter significantly. Information displayed in the chart may alter as new information is received continuously.

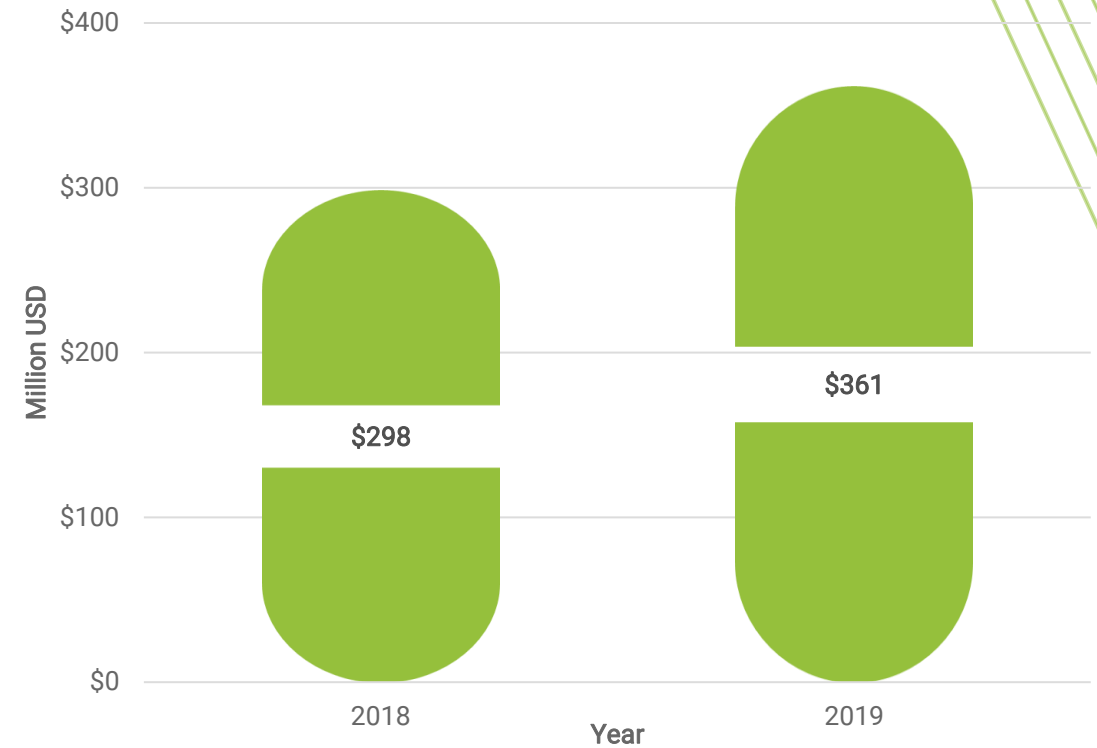
VENTURE FINANCING OF LIFE SCIENCE COMPANIES

PRIVATE EQUITY ROUNDS | 2018-2019

LIFE SCIENCE COMPANIES



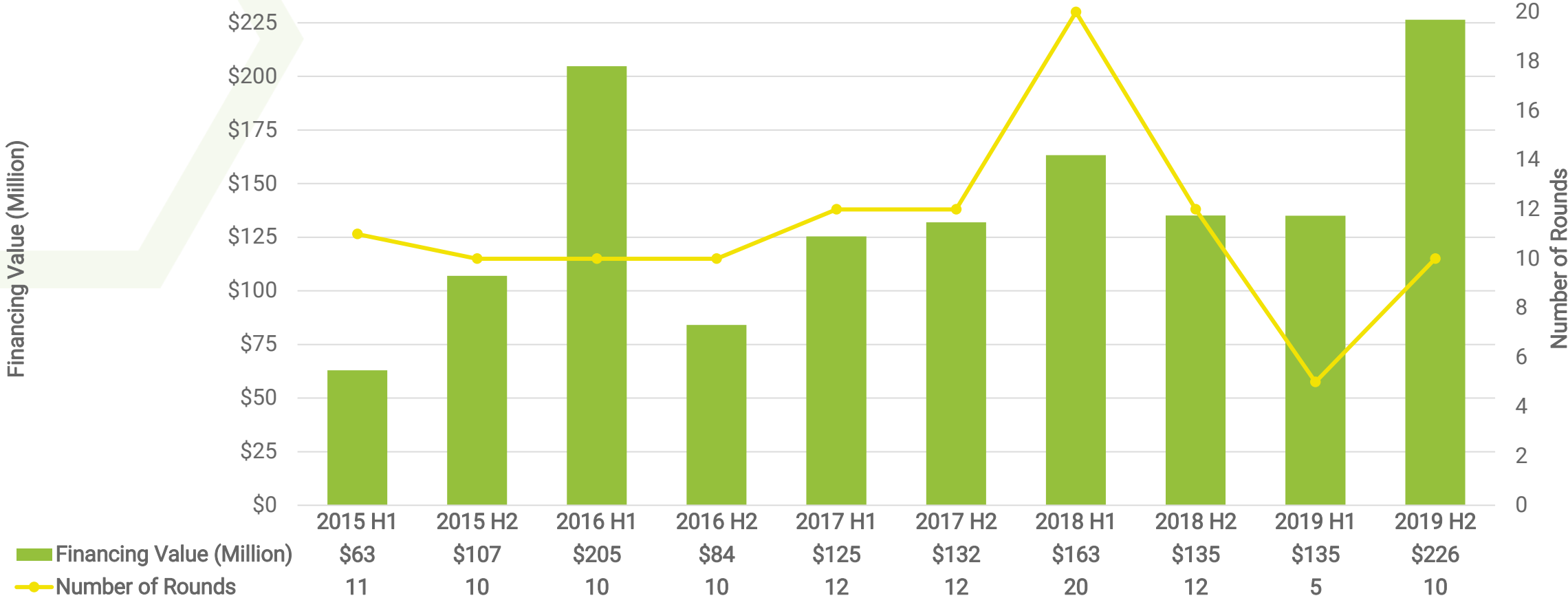
BIOTECH COMPANIES



Life science companies include Biotech - Therapeutic and Diagnostic, Biotech - R&D Services, Biotech - Others, Pharma, Medical Technology and Digital Health companies. Biotech companies are a subset of Life Science companies and include: Biotech - Therapeutic and Diagnostic, Biotech - R&D Services, Biotech - Others. Financing data only incl. private equity rounds of private companies at financing (excl. private placements in public companies). Data may alter as new information is continuously received and/or new tranches to existing financing rounds are added.

BIOTECH VENTURE FINANCING

PRIVATE EQUITY ROUNDS – 5 YEAR REPORT



The graph contains only private equity financing rounds (excl. IPOs, research grants, loans) of biotech companies (incl. therapeutic and diagnostic, R&D services and others). Financing amounts and number of rounds from previous months may alter as new information on financing rounds is received and/or new tranches to existing financing rounds are added.

MAJOR BIOTECH VENTURE FINANCING ROUNDS (2019)

TOP 3 PRIVATE EQUITY FINANCING ROUNDS | 2019

Company	Sector	Type of Round	USD M
Fusion Pharmaceuticals, Inc.	Biotech - Therapeutics	Series B	\$105
Repare Therapeutics Inc.	Biotech - Therapeutics	Series B	\$83
Chinook Therapeutics, Inc.	Biotech - Therapeutics	Series A	\$65

The table shows the three biggest private equity financing rounds (excl. IPOs, research grants, loans) of private and independent biotech therapeutics and diagnostics companies in 2019. Information displayed in the table may alter as new information is continuously received and/or new tranches to existing financing rounds are added.

ABOUT BIOTECHGATE



Biotechgate is a **business development database** that contains over 55,000 high quality profiles of life science companies which include company description, contact information, product pipeline information, financing rounds and management details. Profiles are regularly updated by the companies themselves, as well as by an experienced database team, to ensure the accuracy and relevance of the data. Biotechgate contains also a database of over 8,500 **licensing deals** and a **clinical trial database** containing over 600,000 records with registries from around the world.

To register for a free trial access or to learn more about the different subscription options, please visit www.biotechgate.com.

TERMS OF USE

The Life Sciences Trend Analysis is based on data entered in the Biotechgate Database available at www.biotechgate.com. The statistics and graphs in this presentation are based on figures and information entered in this database and we do not guarantee any accuracy hereof.

The use of the figures and graphs provided in this report is free of charge for any presentations as long as www.biotechgate.com is clearly cited as the source. For all other uses please contact us for terms and conditions.



BIOTECHGATE

c/o Venture Valuation VV AG

Kasernenstrasse 11

8004 Zurich

SWITZERLAND



+41 (43) 321 86 60



www.venturevaluation.com