

# LIFE SCIENCE TREND ANALYSIS

NETHERLANDS | 2022



MAY 2022



# 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](http://www.biotechgate.com)



The Dutch Life Sciences Database is a part of the global Biotechgate and is brought to you in partnership with **HollandBIO**.

[www.dutchbiotech.com](http://www.dutchbiotech.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](http://www.venturevaluation.com)

# OUR PARTNER

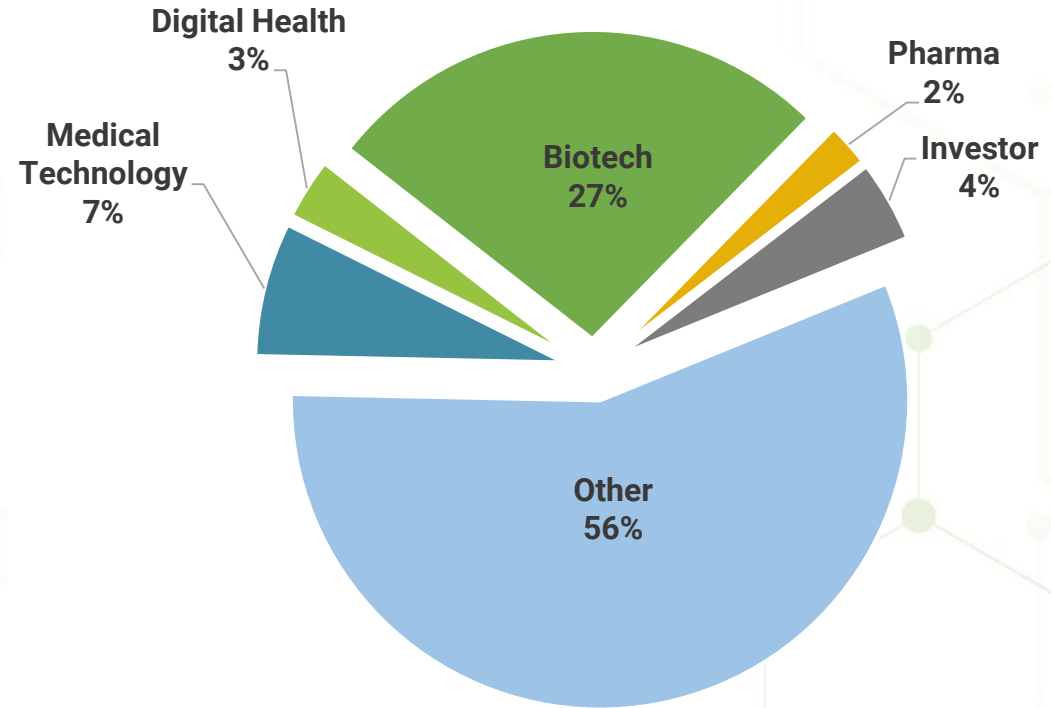


HollandBIO connects, supports, and represents over 250 medical, agro-food, and industrial biotech companies. Their members are active in all phases of research and development and include all company sizes: start-ups, SMEs, listed companies and multinationals.

Together, they strive for a society taking full advantage of the power of biotechnology in health, food and sustainability.

# OVERVIEW OF THE LIFE SCIENCE INDUSTRY

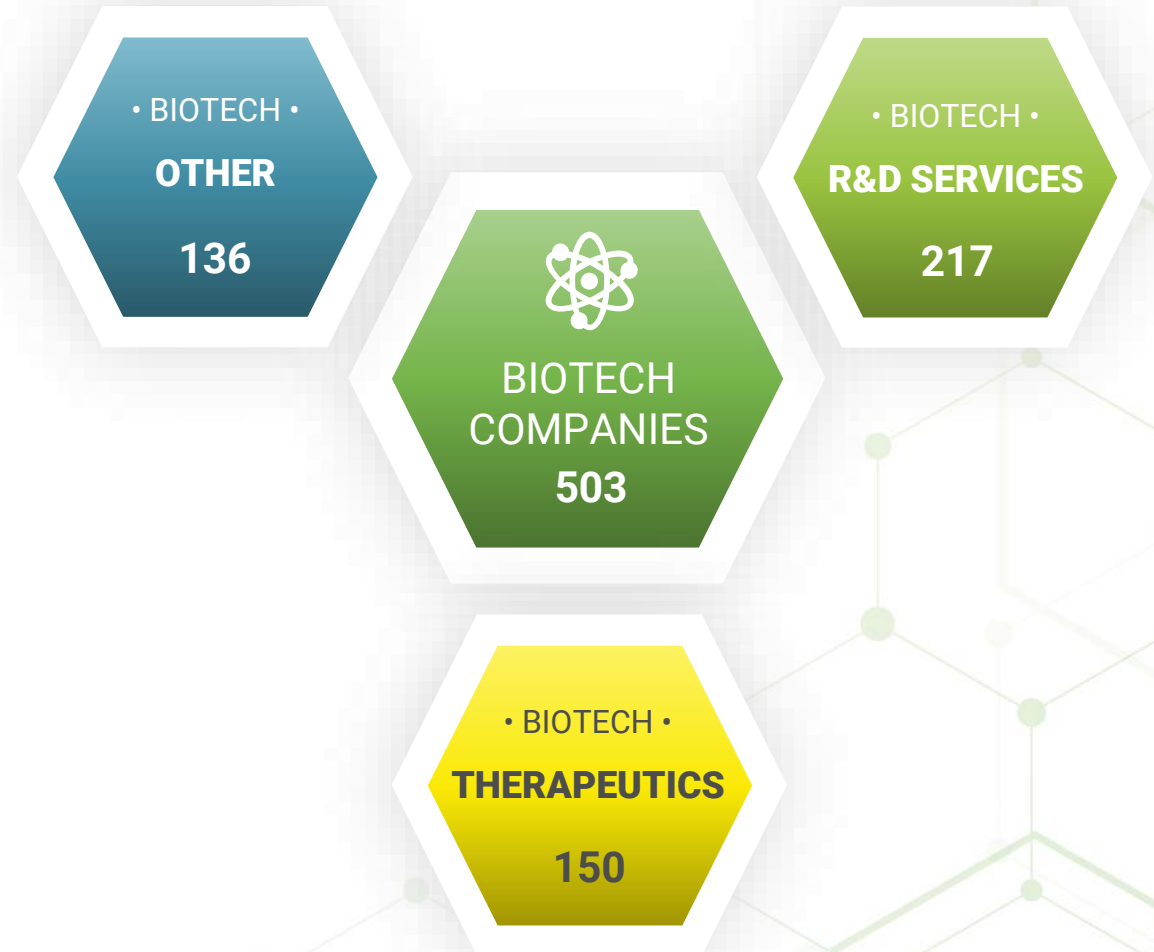
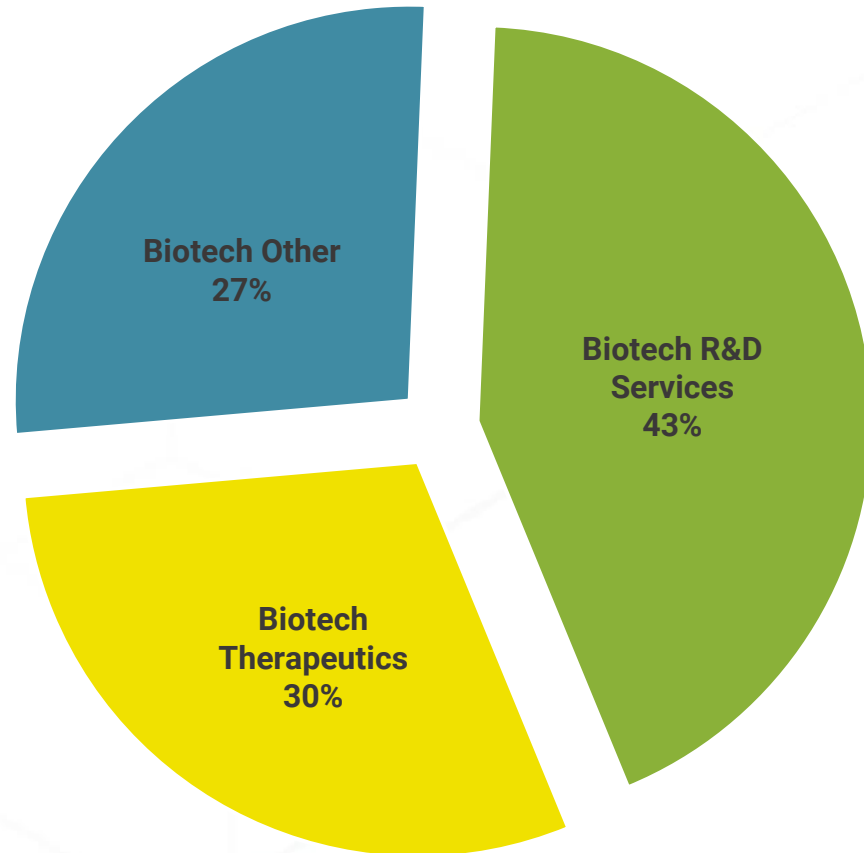
## NUMBER OF COMPANIES BY SECTOR



For the definition of categories please visit [www.biotechgate.com/web/cms/index.php/covered\\_industry\\_sectors.html](http://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 – Other. Percentage value is expressed as % of total number of companies. Information displayed may alter as new information is received continuously.

# OVERVIEW OF BIOTECH COMPANIES

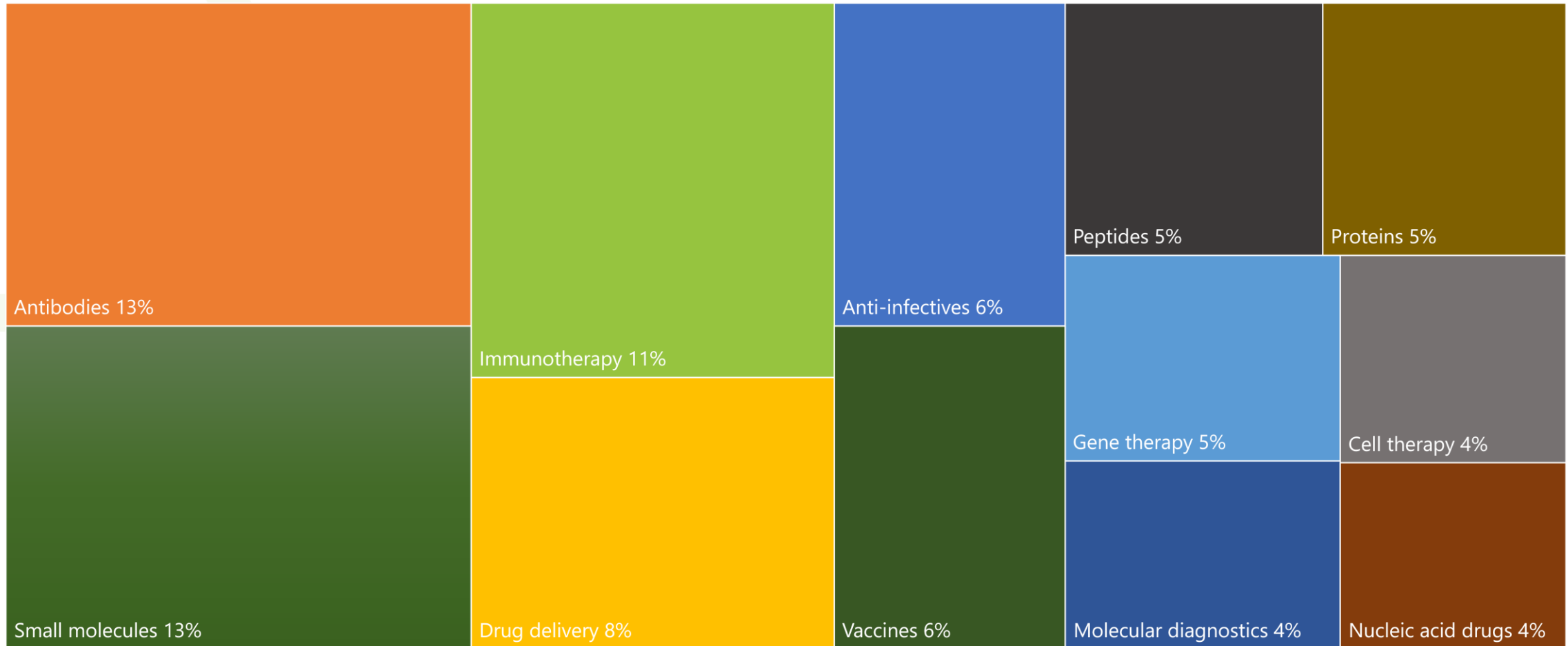
## NUMBER OF COMPANIES BY SECTOR



For the definition of categories please visit [www.biotechgate.com/web/cms/index.php/covered\\_industry\\_sectors.html](http://www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html). Biotech Therapeutics category equals to Biotechnology – 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

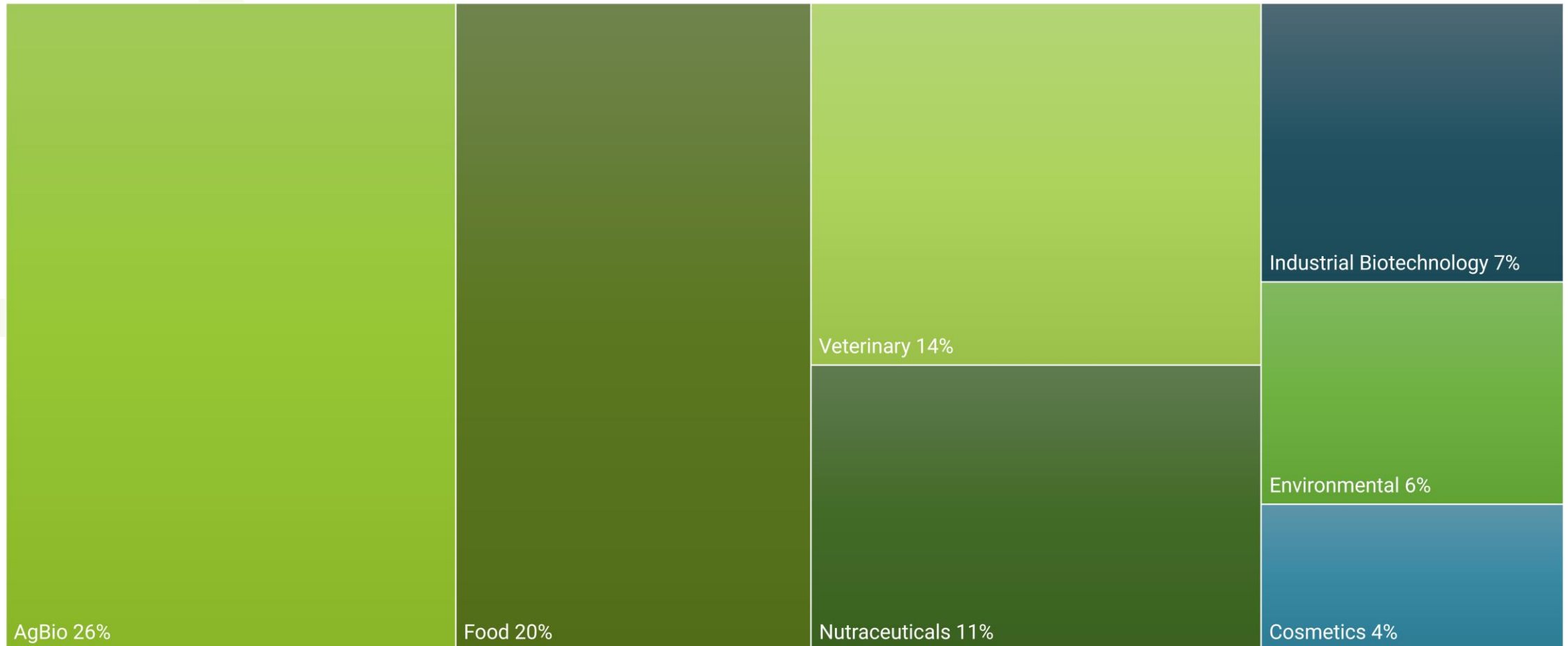
AS PERCENTAGE OF TOTAL NUMBER OF BIOTECH – THERAPEUTICS COMPANIES



For 150 Biotech Therapeutics companies there were 257 subsectors (key activity areas) assigned (one biotech company can be active in multiple areas). The graph displays 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](http://www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html). Information displayed may alter as new information is received continuously.

# BIOTECH – OTHER COMPANIES BY KEY ACTIVITIES

AS PERCENTAGE OF TOTAL NUMBER OF BIOTECH – OTHER COMPANIES

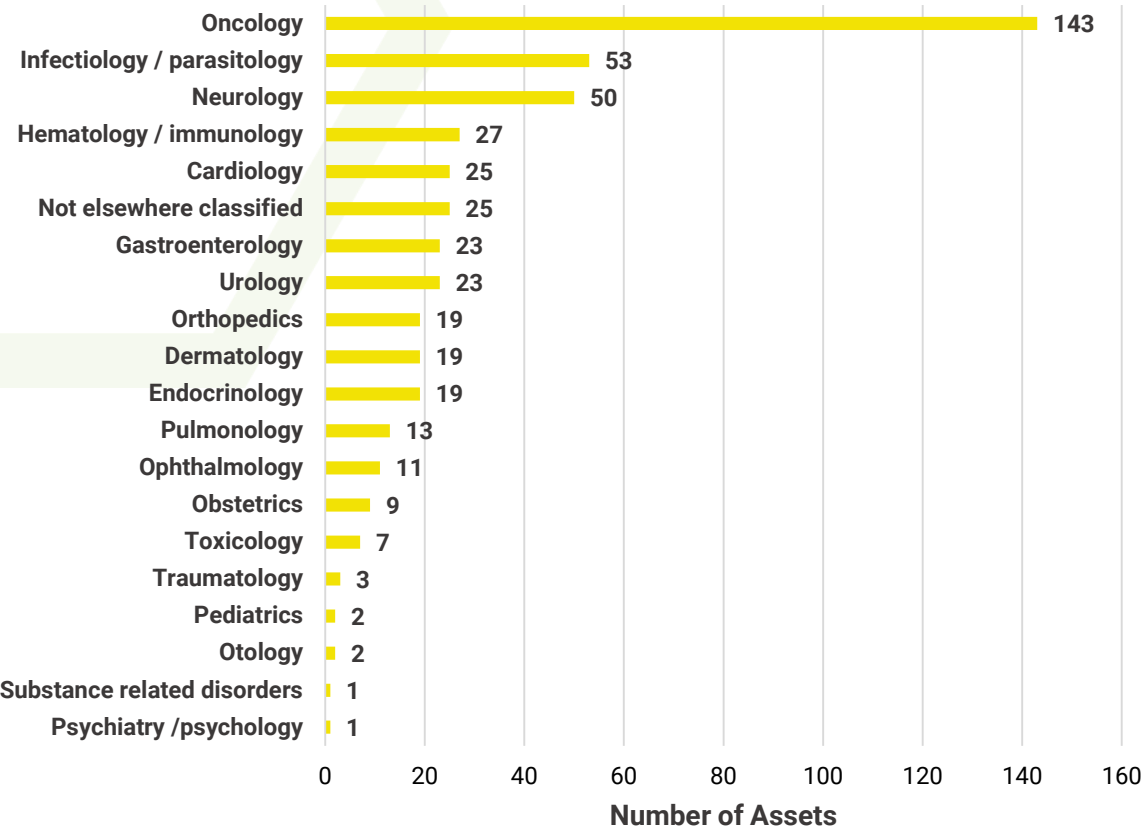


For 134 Biotech Other companies there were 203 subsectors (key activity areas) assigned (one biotech company can be active in multiple areas). The graph displays subsectors as the percentage of the total number of Biotech – Other subsectors with exclusion of the category Others. The company subsectors 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](http://www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html). Information displayed may alter as new information is received continuously.

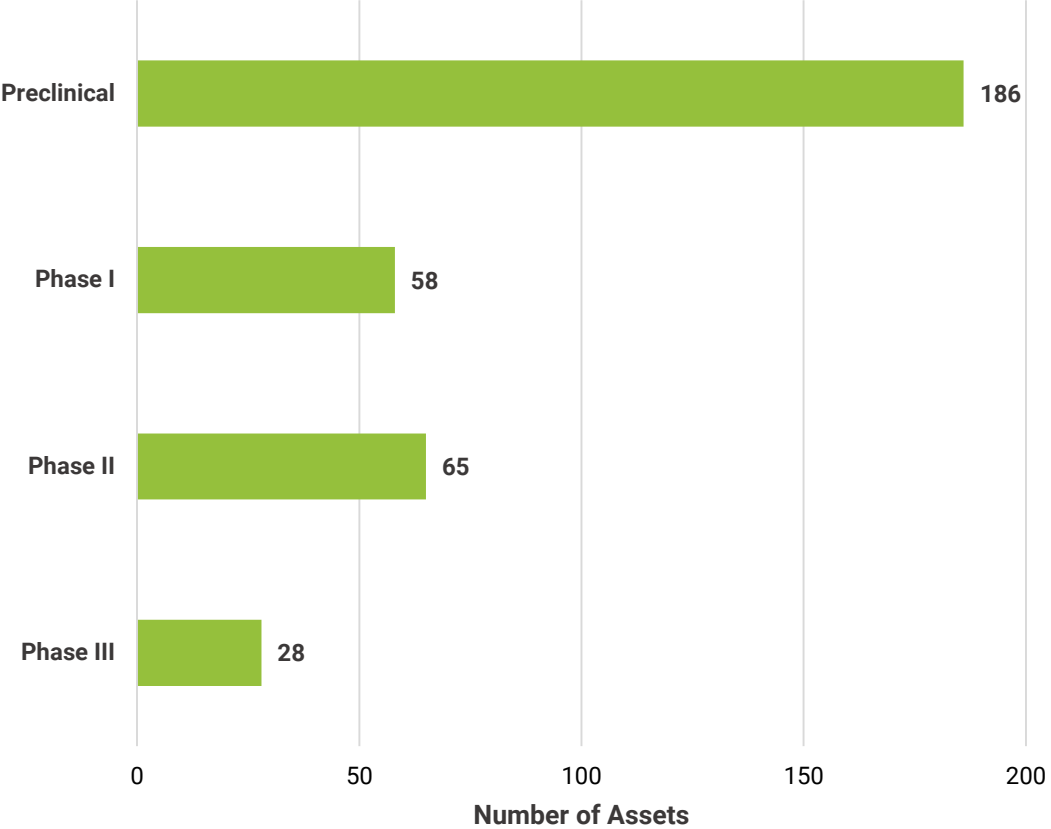
# BIOTECH ASSETS IN CLINICAL DEVELOPMENT

BY INDICATION AND DEVELOPMENT PHASE

## BREAKDOWN BY INDICATION



## BREAKDOWN BY DEVELOPMENT PHASE



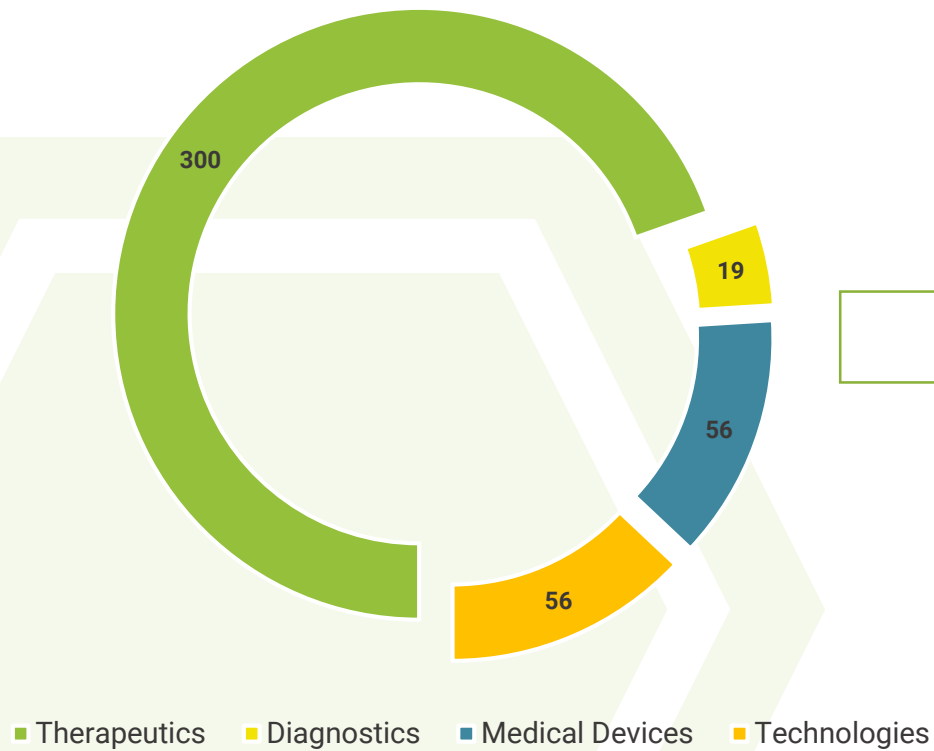
Both graphs contain the number of assets of Biotech – Therapeutics and Diagnostics companies (excl. of Pharma or Biotech – Others or Biotech R&D Services companies). Products in Discovery and Lead Optimization Phase are merged into Preclinical; Development Phase I/II trials are merged into Phase II and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



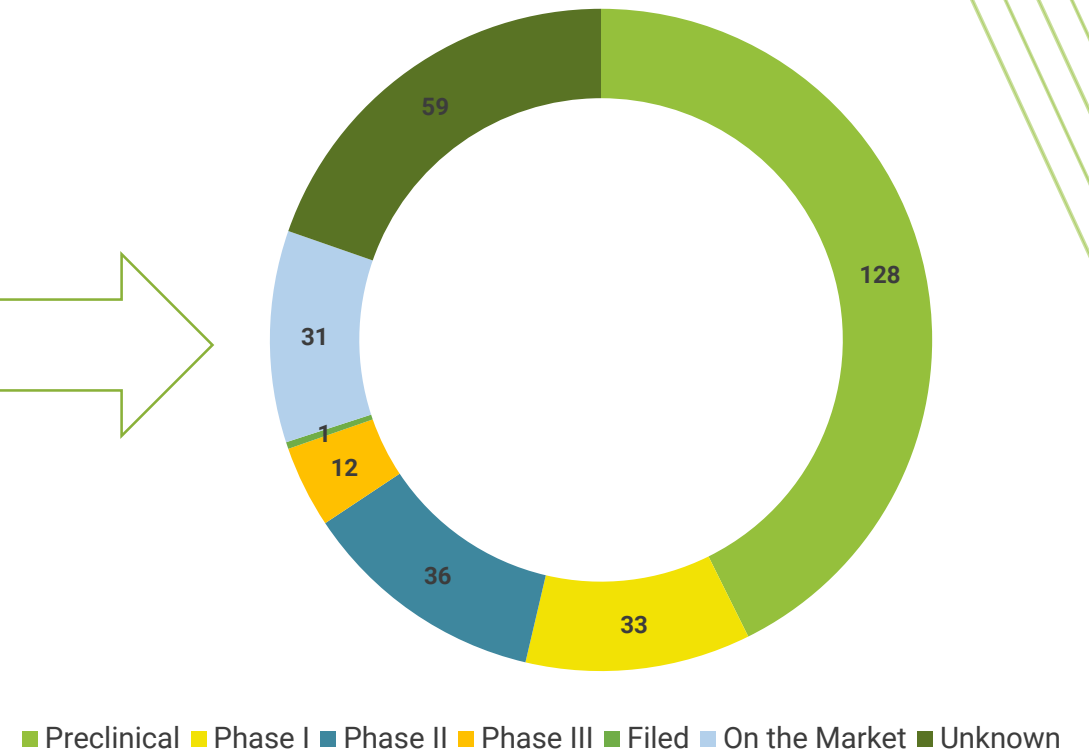
# ASSETS AVAILABLE FOR OUT-LICENSING

## NUMBER OF ASSETS

### BY ASSET CLASS



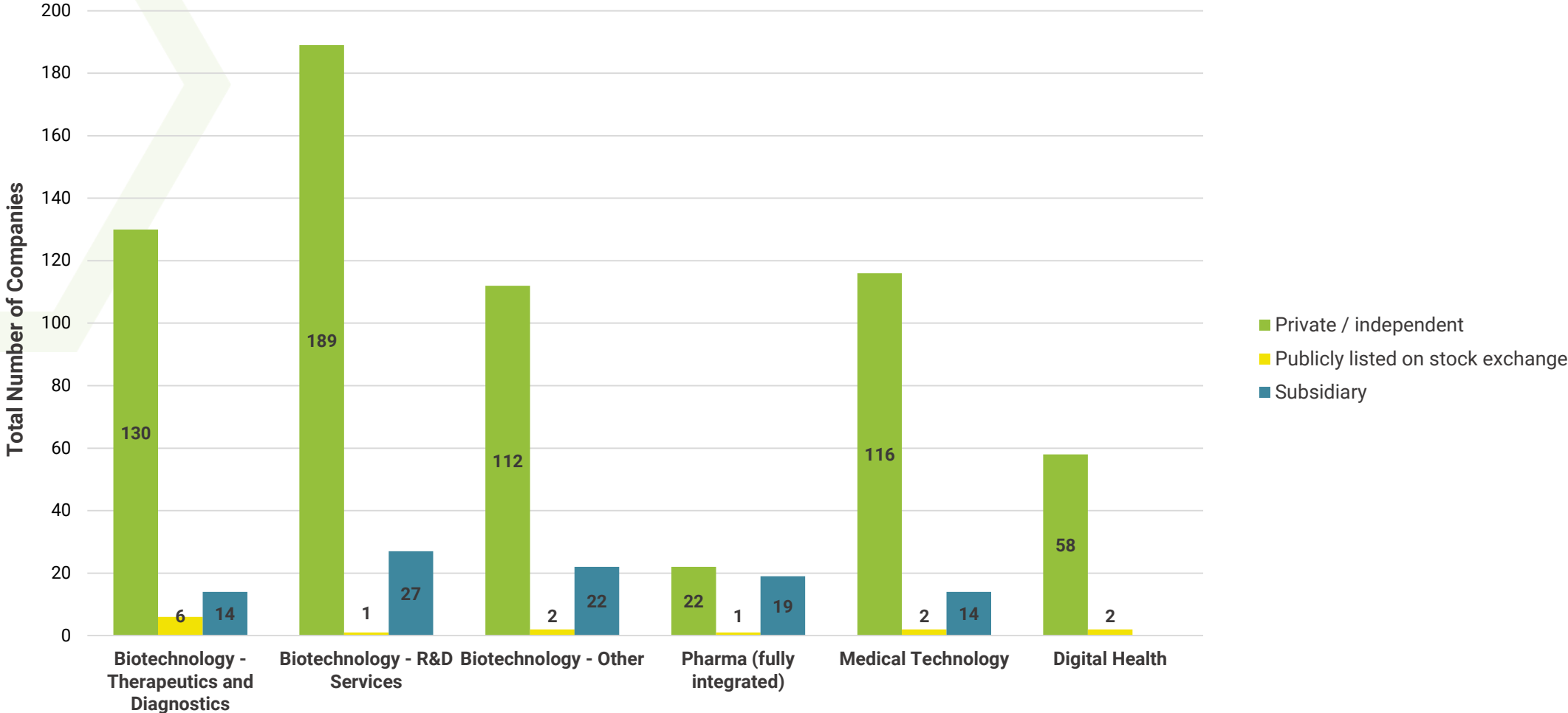
### THERAPEUTICS BY DEVELOPMENT PHASE



The graph titled Therapeutics in Development by Development Phase displays a subset of the asset class Therapeutics. Products in Discovery and Lead Optimization Phase are merged into Preclinical; Development Phase I/II trials are merged into Phase II and Phase II/III trials are merged into Phase III category.

# OVERVIEW OF OWNERSHIP

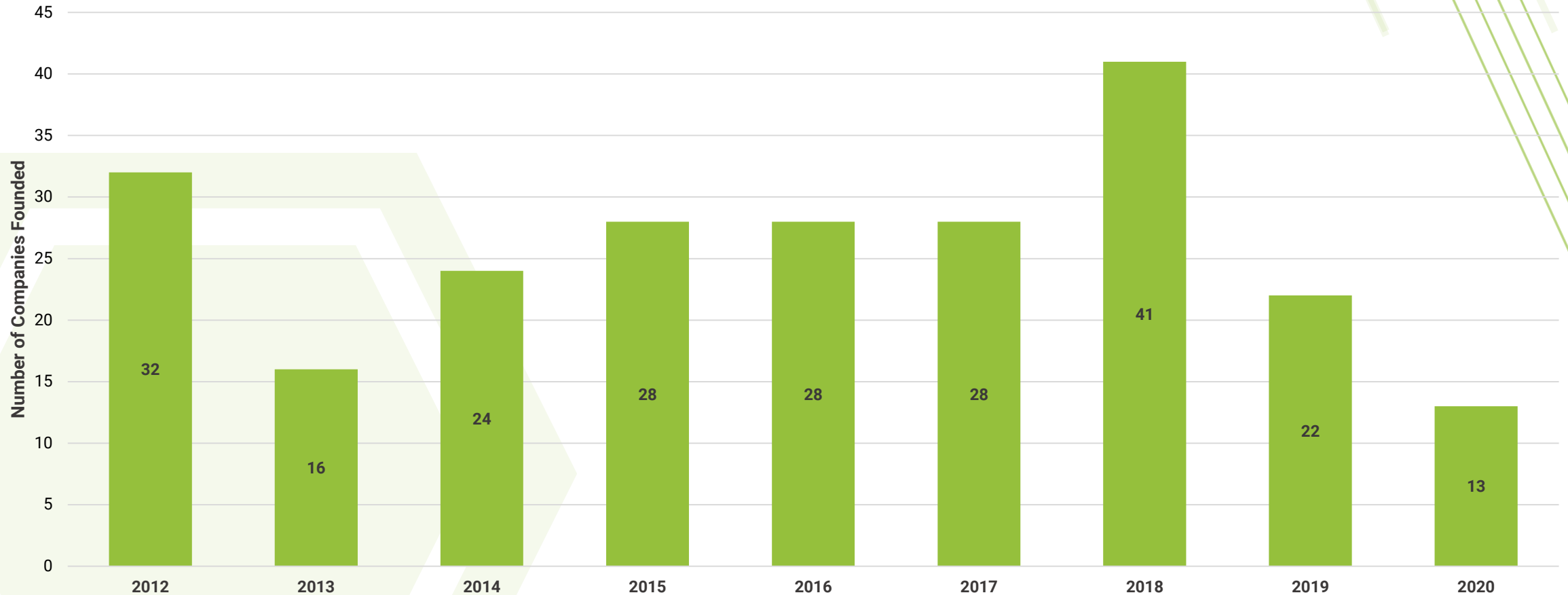
## TOTAL NUMBER OF COMPANIES BY OWNERSHIP AND SECTOR



For the definition of categories please visit [www.biotechgate.com/web/cms/index.php/covered\\_industry\\_sectors.html](http://www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html). Information displayed may alter as new information is received continuously.

# COMPANY FOUNDATION TIMELINE

NUMBER OF LIFE SCIENCE COMPANIES FOUNDED BY YEAR | 2012-2020

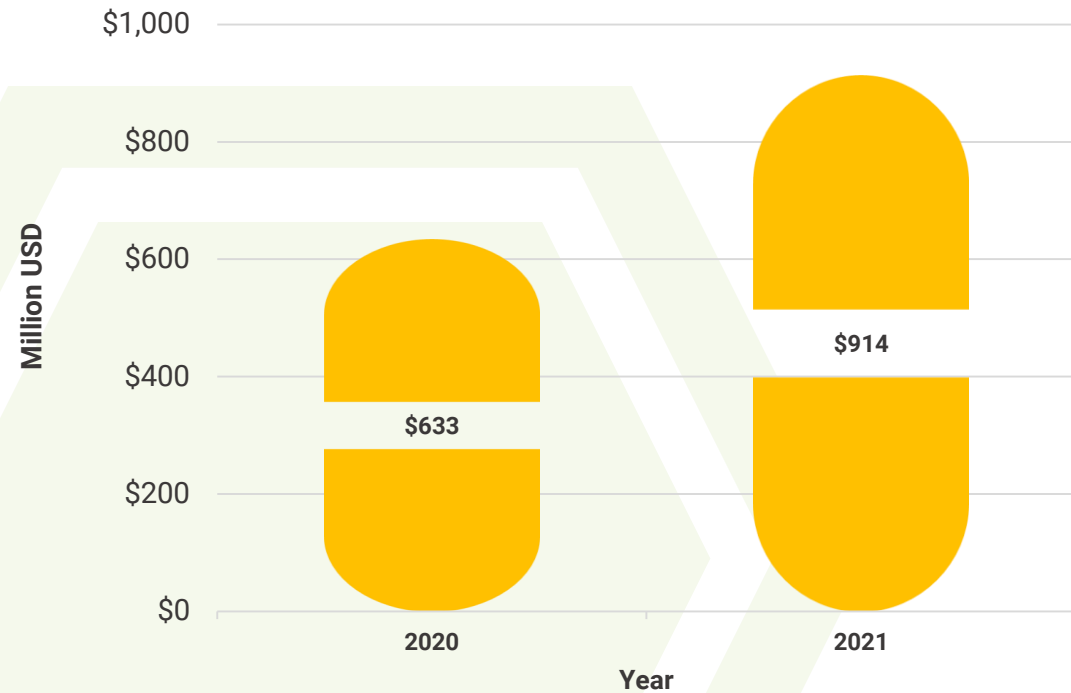


The graph contains the number of privately owned or publicly listed (no subsidiaries) life science companies founded by year including Biotech – Therapeutics and Diagnostics, Biotech – R&D Services, Biotech – Others, Pharma, Medical Technology and Digital Health companies. **Companies founded in 2021 were excluded** since newly founded companies often remain under the radar until their first financing round. Information displayed in the chart may alter as new information is received continuously.

# VENTURE FINANCING OF LIFE SCIENCE COMPANIES

## PRIVATE EQUITY ROUNDS | 2020-2021

### LIFE SCIENCE COMPANIES



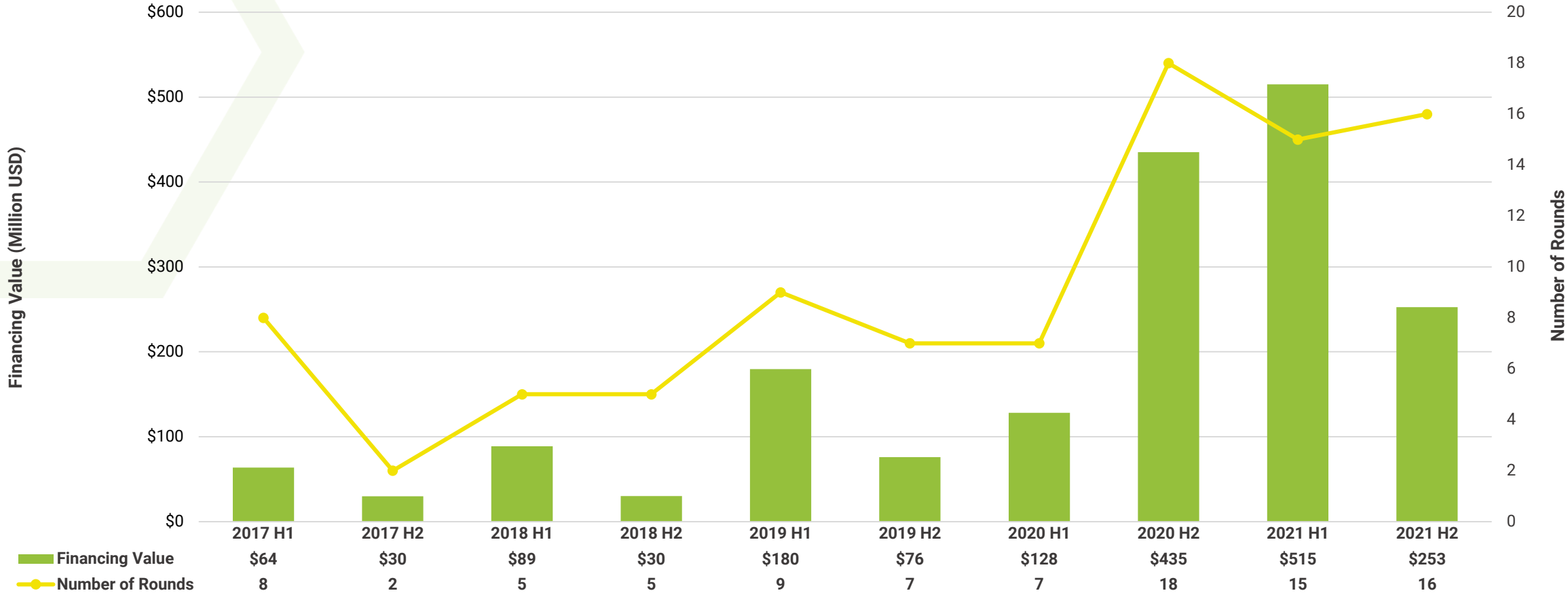
### BIOTECH COMPANIES



Life Science companies include Biotech – Therapeutics and Diagnostics, 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 includes private equity rounds (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



Biotech companies are a subset of Life Science companies and include: Biotech – Therapeutics and Diagnostics, Biotech – R&D Services, Biotech – Others. Financing data only includes private equity rounds (excl. private placements in public companies) of biotech companies (incl. therapeutic and diagnostic, R&D services and others). Data may alter as new information is continuously received and/or new tranches to existing financing rounds are added.

# MAJOR BIOTECH VENTURE FINANCING ROUNDS (2021)

## TOP 5 PRIVATE EQUITY FINANCING ROUNDS | 2021

Company	Sector	Type of Round	USD M
NewAmsterdam Pharma B.V.	Biotech - Therapeutics	Series A	\$196
Leyden Laboratories B.V.	Biotech - Therapeutics	Series B	\$140
Neogene Therapeutics, Inc.	Biotech - Therapeutics	Series A	\$110
LUMICKS	Biotech – R&D Services	Series D	\$93
Lava Therapeutics N.V.	Biotech - Therapeutics	Series C	\$83

The table shows the five biggest private equity financing rounds (excl. IPOs, research grants, loans) of private and independent biotech companies in 2021. 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 60,000 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 20,000 **licensing deals** and a **clinical trial database** containing over 750,000 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](http://www.biotechgate.com).

# BIOTECHGATE DIGITAL PARTNERING

Virtual business development & licensing event  
Aug 29 – Sep 2, 2022



**BIOTECH  
GATE**  
DIGITAL PARTNERING



[www.digitalpartnering.com](http://www.digitalpartnering.com)





# TERMS OF USE

The Life Sciences Trend Analysis is based on data entered in the Biotechgate Database available at [www.biotechgate.com](http://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](http://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](http://www.venturevaluation.com)