

# LIFE SCIENCE TREND ANALYSIS

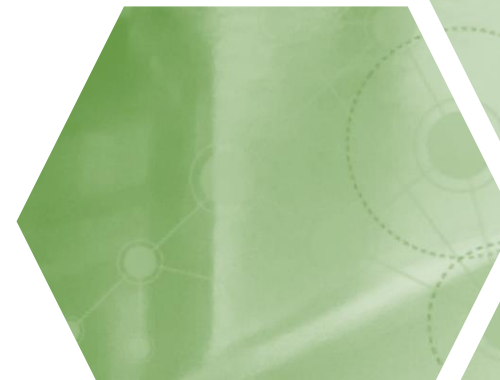
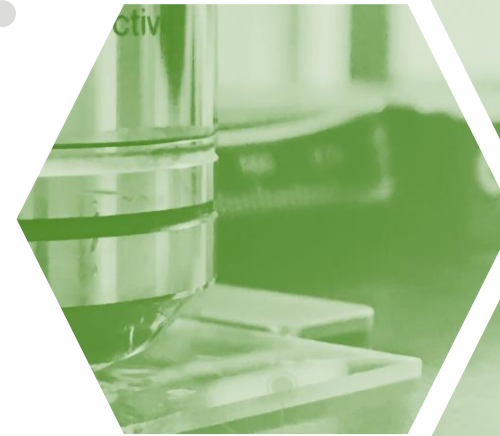
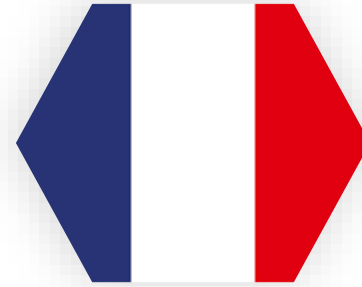
FRANCE | 2023



VENTURE VALUATION  
GLOBAL VALUATION SERVICES



JUNE 2023



# ABOUT US



The following statistical information has been obtained from Biotechgate, a global, comprehensive life science database encompassing the biotechnology, pharmaceutical and medical device industries.

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



The French Biotech Database is a part of the global Biotechgate and is brought to you in partnership with ALLIS-NA and Medicen Paris Region.

[www.frenchbiotech.com](http://www.frenchbiotech.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 PARTNERS



The **Alliance Innovation Santé Nouvelle-Aquitaine (ALLIS-NA)** is the healthcare hub serving all actors in the health sector in the New Aquitaine region. The primary objective of ALLIS-NA is to take part in the consolidation and economic growth of the sector throughout the region, by promoting innovation in the health sector and strengthening the competitiveness of regional companies and the attractiveness and development of the regional health ecosystem.

Today, ALLIS-NA brings together 150 members across the entire health value chain and the region, with 5 own facilities or partnerships.

The ALLIS-NA member directory, created and run by Biotechgate, is available at: <https://allis-na.fr/biotechgate-en>

# OUR PARTNERS



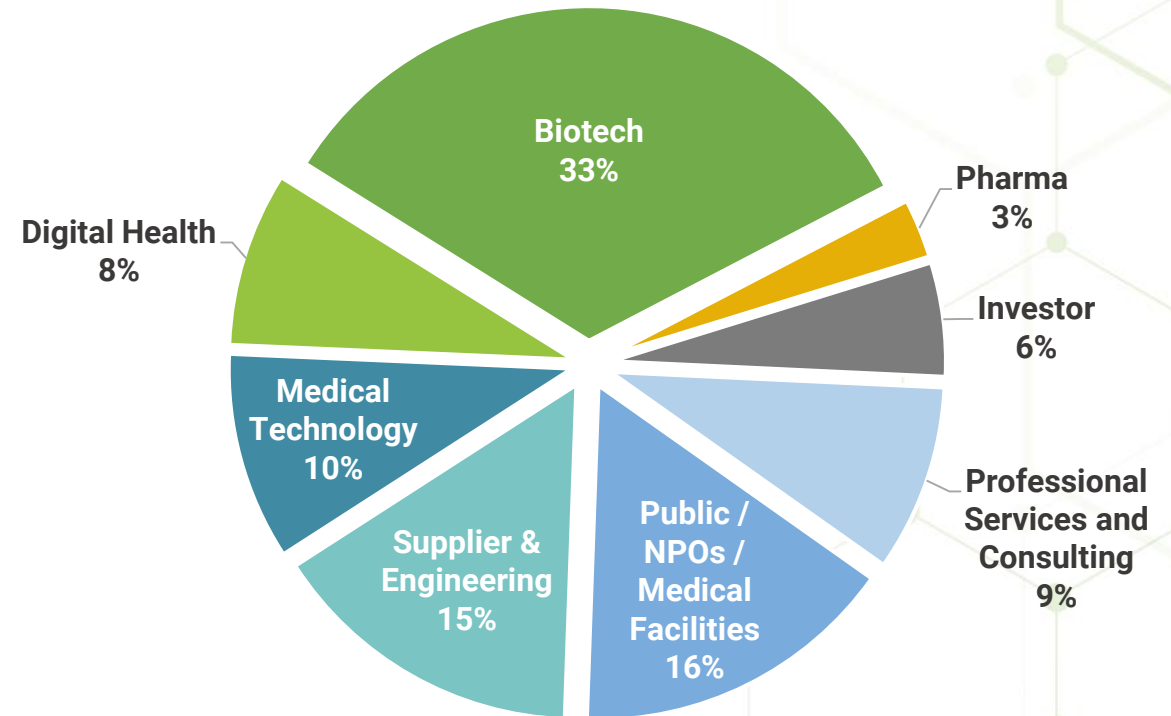
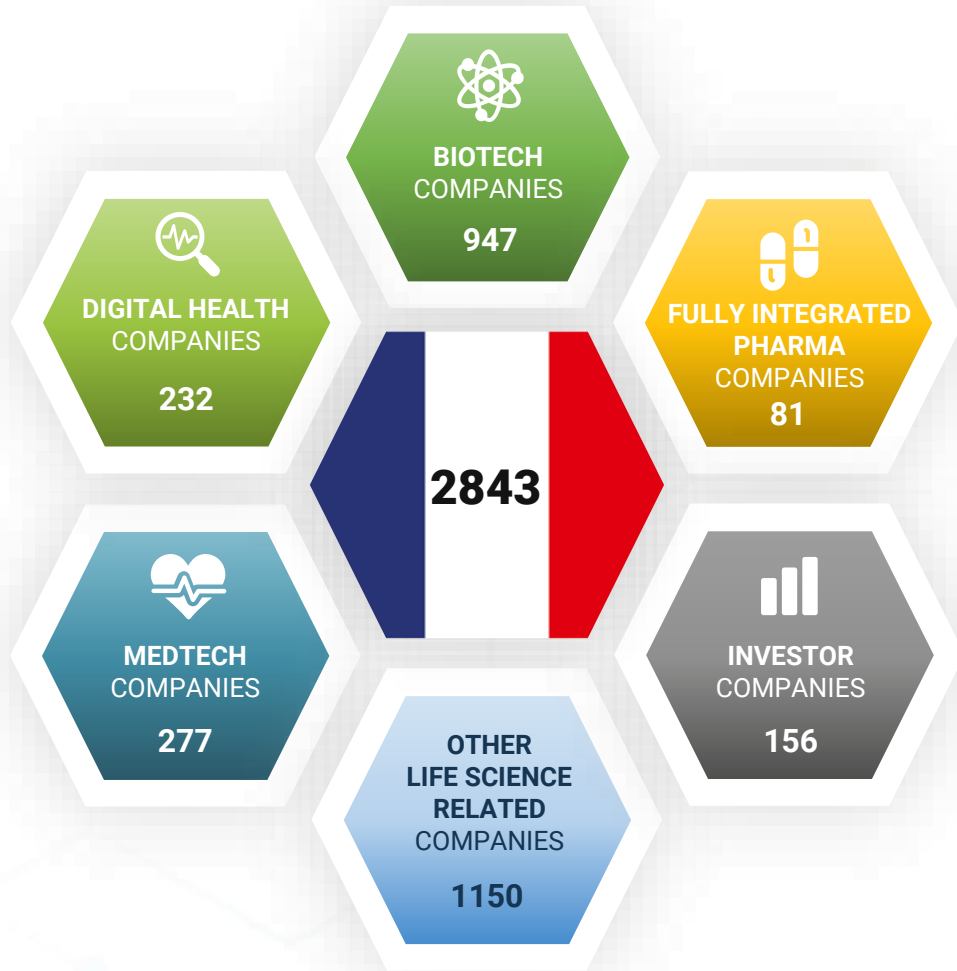
Founded in 2005, the **Medicen Paris Region** global competitiveness cluster aims to position the Paris Region as a European industrial leader in diagnostic and therapeutic innovation and leading-edge health technologies, thus enabling it to become one of the global centres for translational medicine. Medicen Paris Region's partnership approach is based on the concept of economic value creation in the Paris Region stimulated by innovation, which forms the very basis of the creation of competitiveness clusters and sets three main priorities:

- developing growth and employment in profitable markets in a successful dynamic relationship between YICs/SMEs, large firms and academic laboratories, clinical centres and educational establishments, promoting transfer of innovative technologies;
- strengthening international competitiveness for the French “health and leading-edge health technology” sector promoting those involved and stimulating the Paris Region's capacity for innovation;
- helping to increase the attractiveness of the Paris Region and the vitality of its healthcare sector.

Search the Life Science Directory for Medicen Paris run by Biotechgate:  
<https://medicen.org/notre-reseau/les-adherents-medicen/>

# OVERVIEW OF THE LIFE SCIENCE INDUSTRY

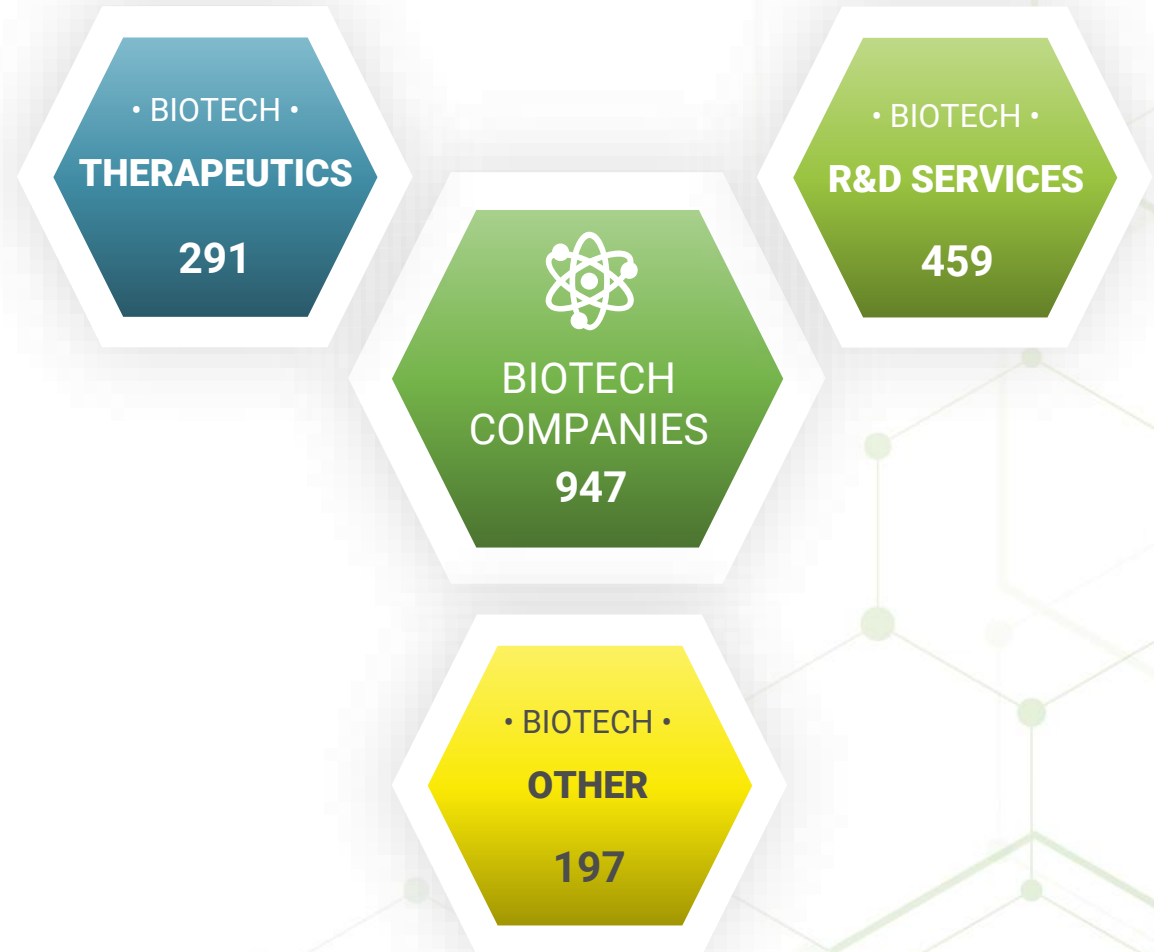
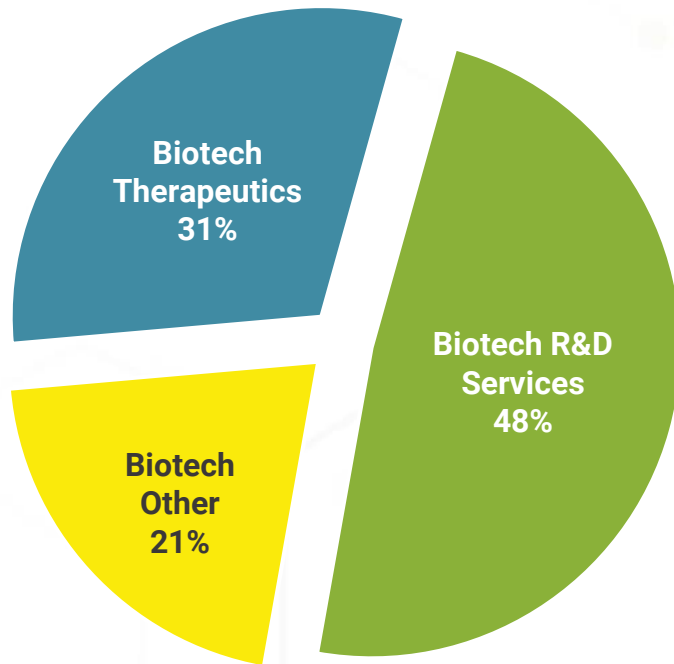
## NUMBER OF COMPANIES BY SECTOR



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. Other life science related companies include supplier & engineering, professional services & consulting, media and public / non-profit organizations / medical facilities. Percentage value is expressed as % of total number of companies. Information displayed may alter as new information is received continuously.

# OVERVIEW OF BIOTECH COMPANIES

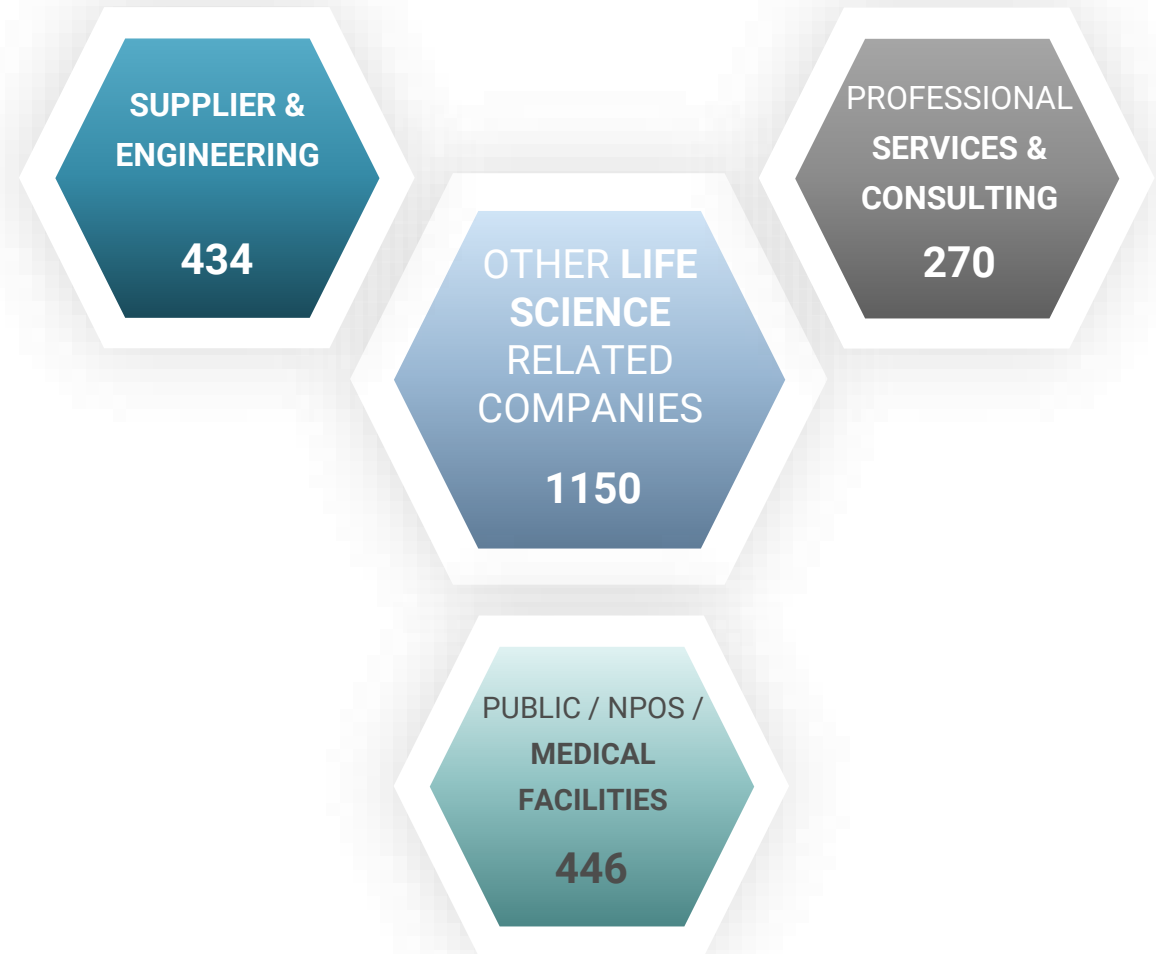
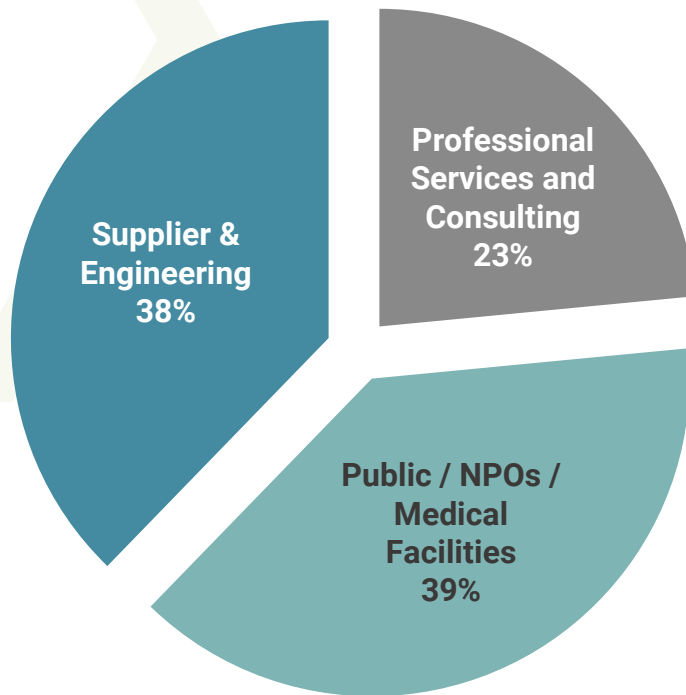
## NUMBER OF COMPANIES BY SECTOR



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 Biotech Therapeutics and Diagnostics. Biotech companies are a subset of Life Science companies and include: Biotech - Therapeutics and Diagnostics, Biotech - R&D Services, Biotech - Others. 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.

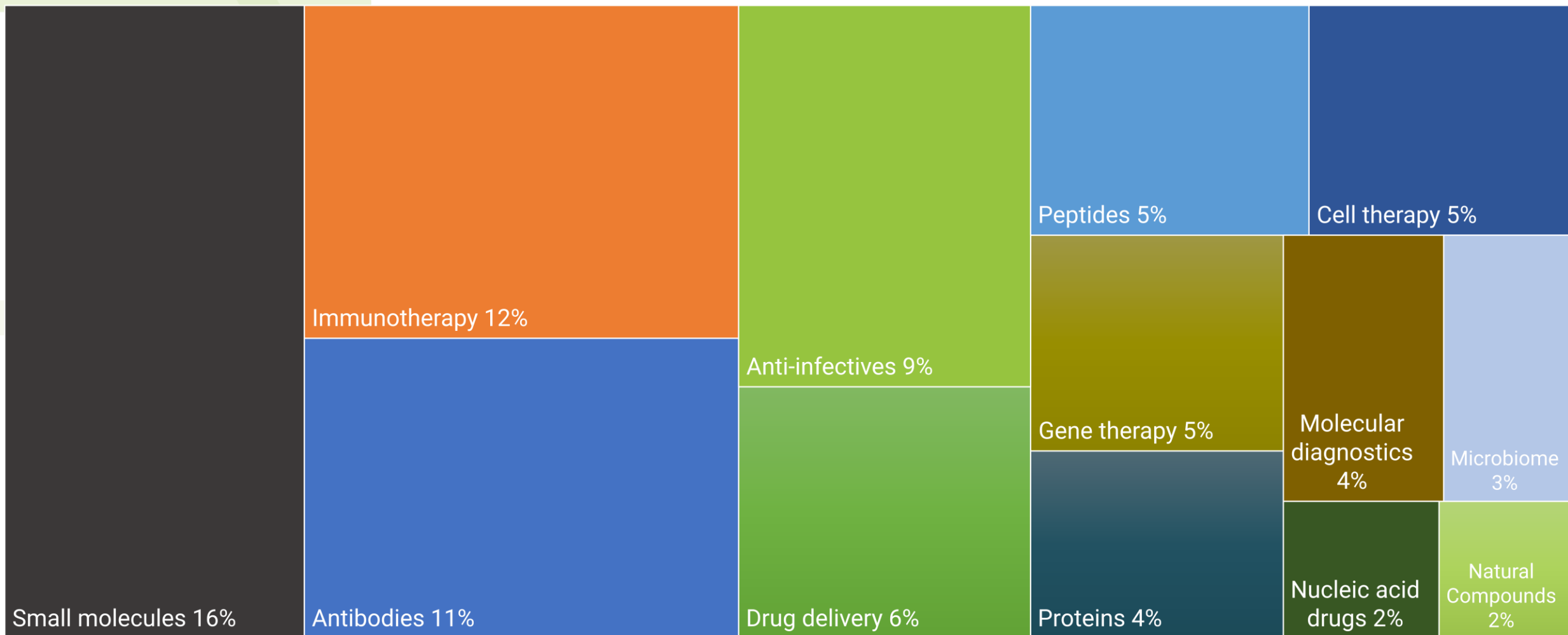
# OVERVIEW OF OTHER LIFE SCIENCE RELATED COMPANIES

## NUMBER OF COMPANIES BY OTHER LIFE SCIENCE RELATED SECTORS



# BIOTECH - THERAPEUTICS COMPANIES BY KEY ACTIVITIES

AS PERCENTAGE OF TOTAL NUMBER OF BIOTECH - THERAPEUTICS COMPANIES



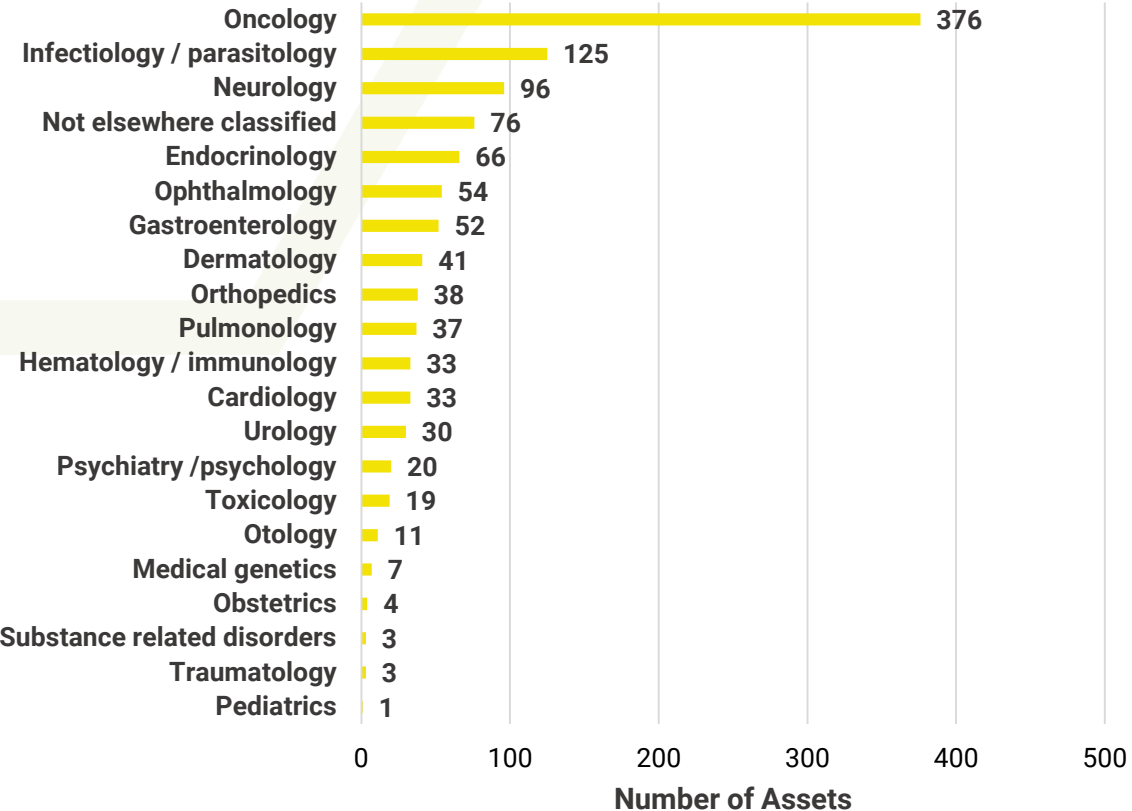
For 291 Biotech Therapeutics companies there were 462 subsectors (key activity areas) assigned (one biotech company can be active in multiple areas). The graph displays Biotech – Therapeutics and Diagnostics subsectors as the percentage of the total number of Biotech – Therapeutics and Diagnostics subsectors 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](http://www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html). Information displayed may alter as new information is received continuously.



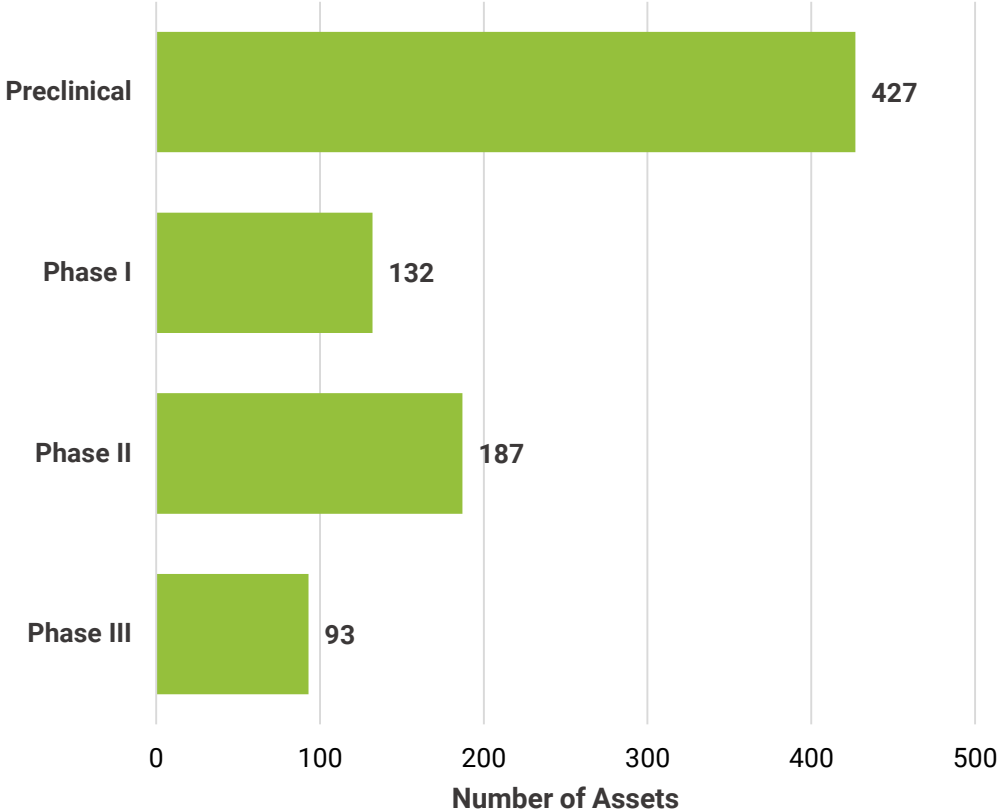
# BIOTECH ASSETS IN CLINICAL DEVELOPMENT

## BY INDICATION AND DEVELOPMENT PHASE

BREAKDOWN BY INDICATION



BREAKDOWN BY DEVELOPMENT PHASE

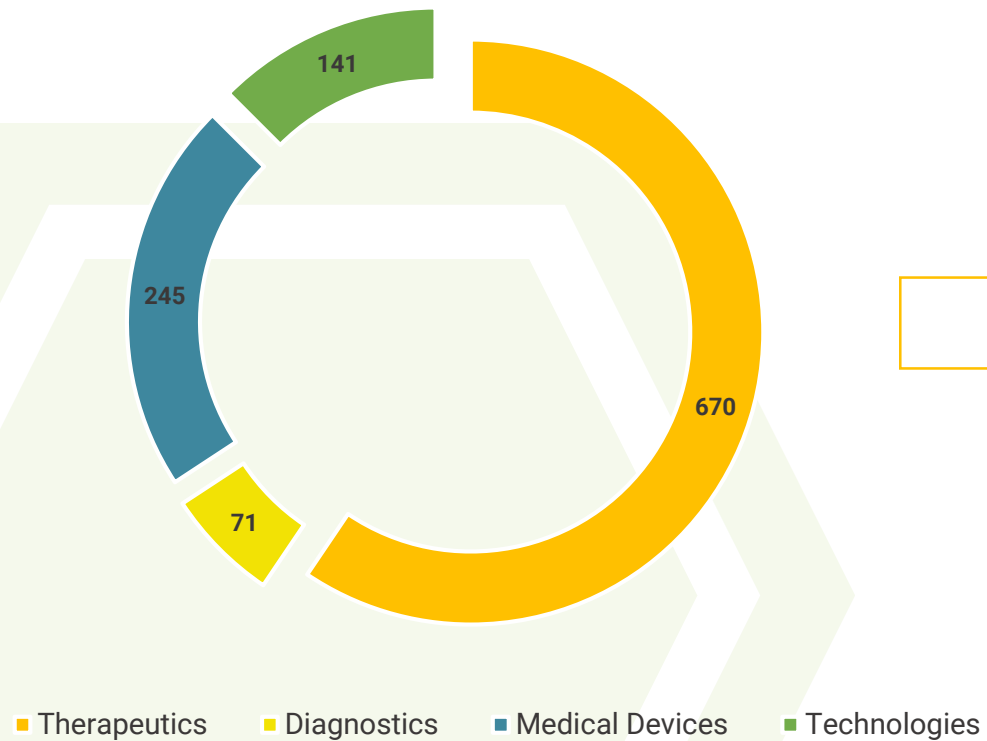


Both graphs contain the number of assets of Biotech – Therapeutics and Diagnostics companies (excl. of Pharma or Biotech – Others or Biotech R&D Services companies). Products in Discovery and Lead Optimization Phase are merged into Preclinical; Development Phase I/II trials are merged into Phase II and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

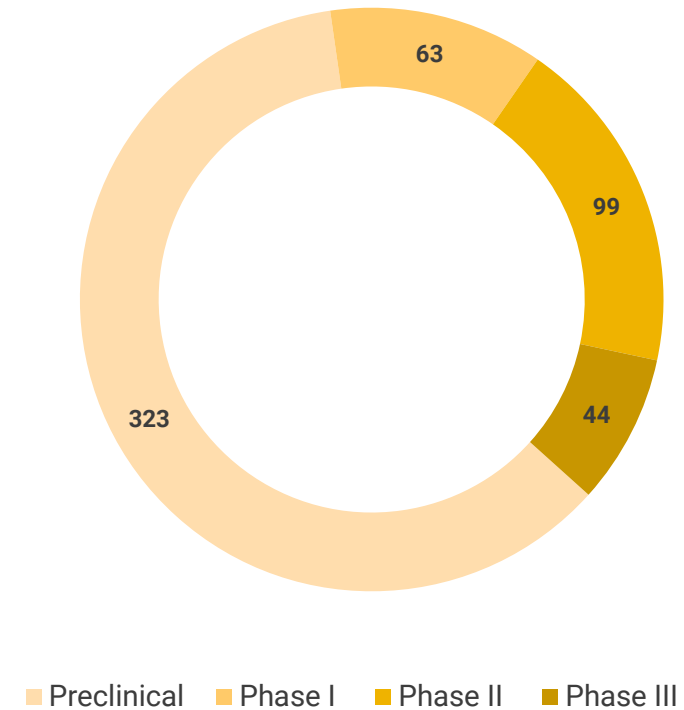
# ASSETS AVAILABLE FOR OUT-LICENSING

## NUMBER OF ASSETS

### BY ASSET CLASS



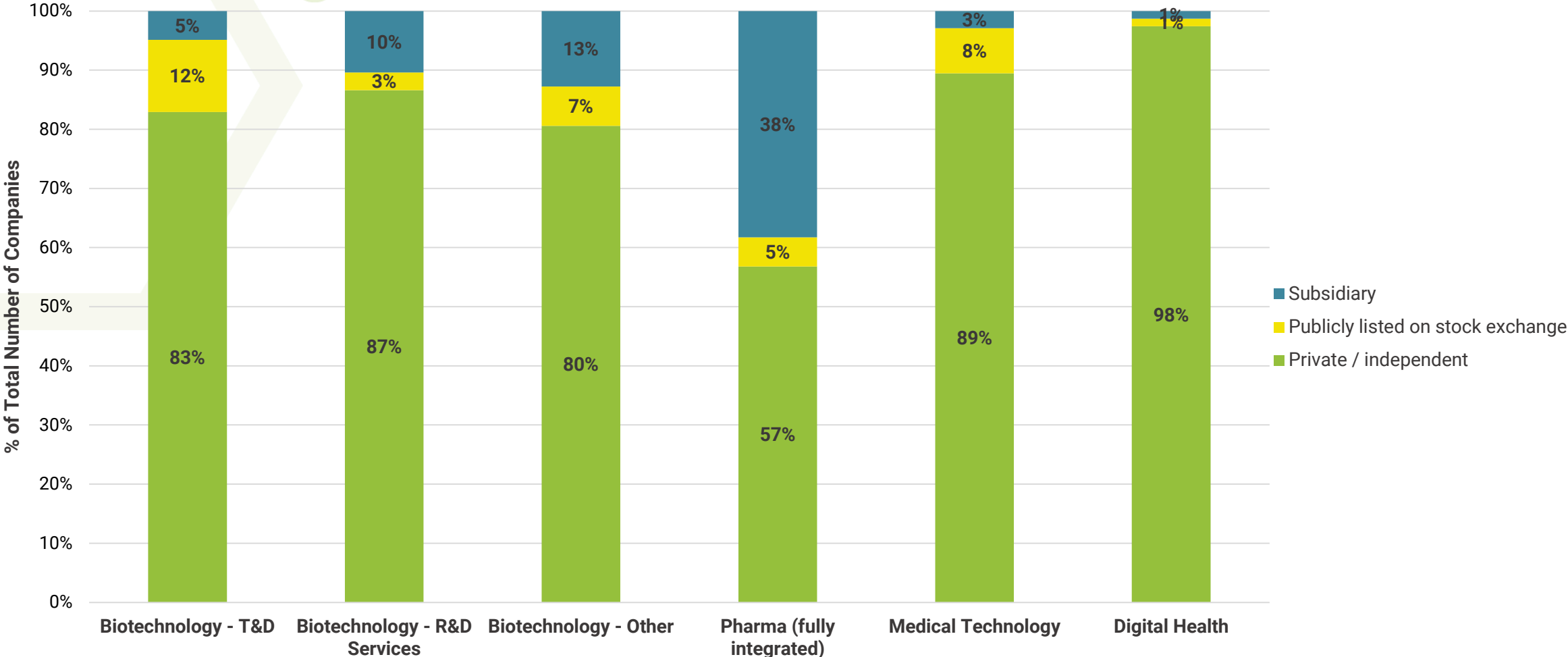
### THERAPEUTICS IN DEVELOPMENT BY DEVELOPMENT PHASE



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

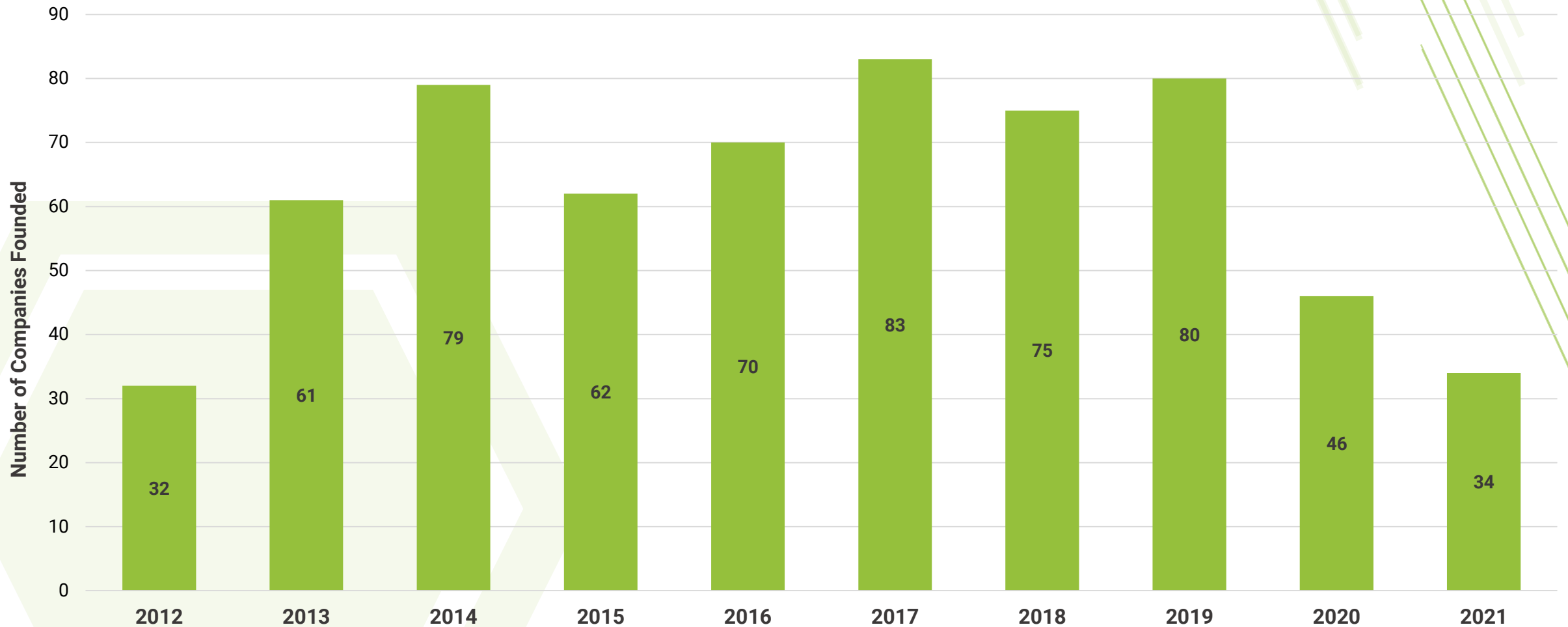
## PERCENTAGE OF TOTAL NUMBER OF COMPANIES BY OWNERSHIP AND SECTOR



For the definition of categories please visit [www.biotechgate.com/web/cms/index.php/covered\\_industry\\_sectors.html](http://www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html). Biotech T&D stands for Biotech Therapeutics and Diagnostics. Percentage value is expressed as % of total number of companies in the sector. Information displayed may alter as new information is received continuously.

# COMPANY FOUNDATION TIMELINE

NUMBER OF LIFE SCIENCE COMPANIES FOUNDED BY YEAR | 2012-2021

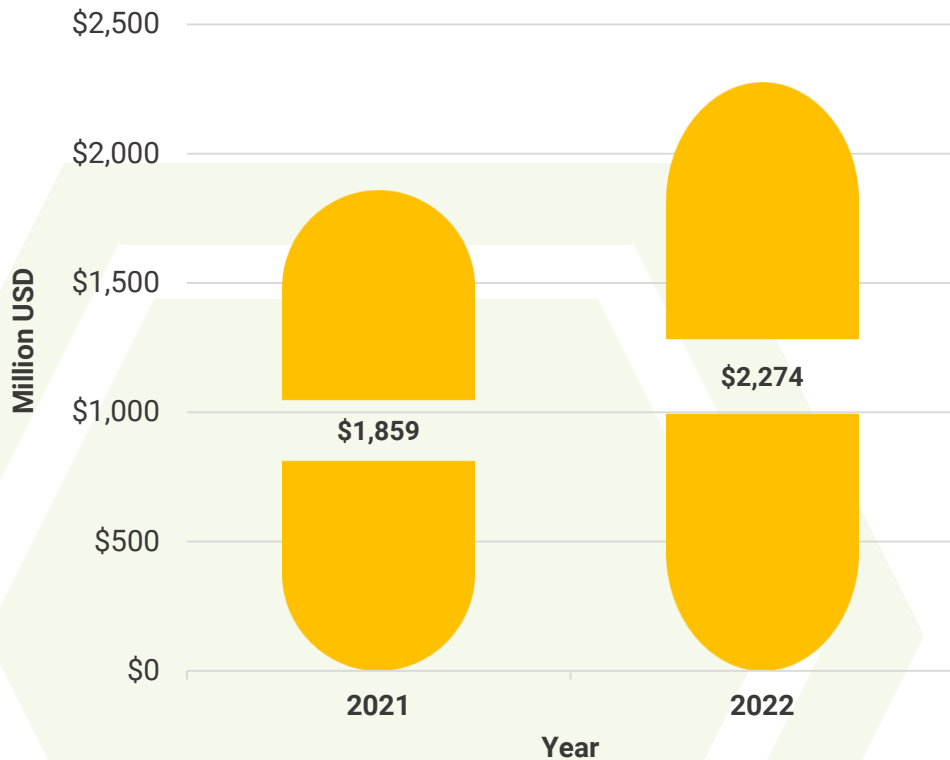


The graph contains the number of privately owned or publicly listed (no subsidiaries) life science companies founded by year including Biotech - Therapeutic and Diagnostic, Biotech - R&D Services, Biotech - Others, Pharma, Medical Technology and Digital Health companies. **Companies founded in 2022 were 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 | 2021-2022

### LIFE SCIENCE COMPANIES



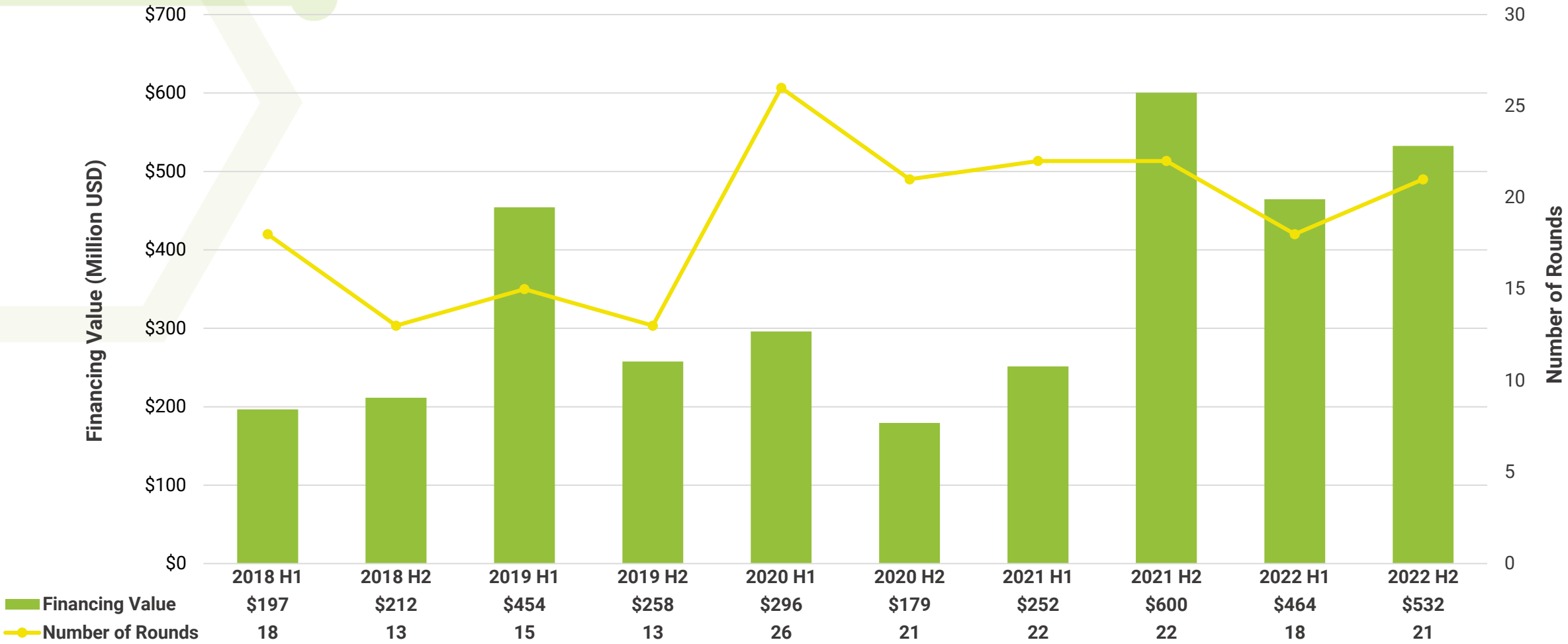
### BIOTECH COMPANIES



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 - Therapeutics and Diagnostics, 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

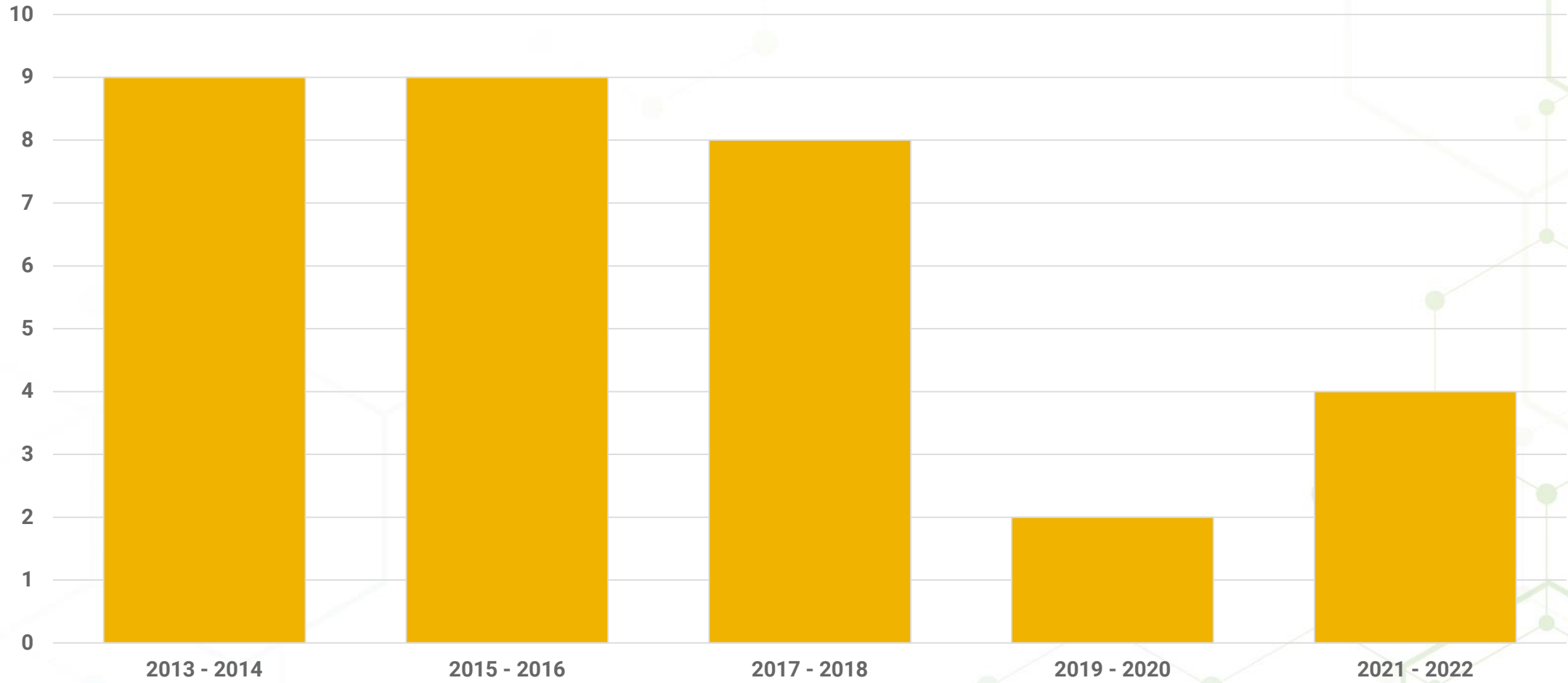
## PRIVATE EQUITY ROUNDS – 5 YEAR REPORT



Biotech companies are a subset of Life Science companies and include: Biotech - Therapeutic and Diagnostic, 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.

# BIOTECH IPOs

NUMBER OF FRENCH BIOTECH COMPANIES THAT WENT PUBLIC WORLDWIDE (2013-2022)



Included are Biotechnology – Therapeutics and Diagnostics, Biotechnology – R&D services, and Biotech – Other companies, Pharma (fully integrated), Medical Technology, and Digital Health companies. Data may alter as new information is continuously received.

# MAJOR BIOTECH VENTURE FINANCING ROUNDS (2022)

## TOP 5 PRIVATE EQUITY FINANCING ROUNDS | 2022

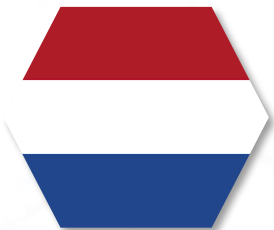
Company	Sector	Type of Round	USD M
<b>InnovaFeed</b>	Biotech – Other	Series D	\$250
<b>DNA Script SAS</b>	Biotech – R&D Services	Series C	\$200
<b>ImCheck Therapeutics SAS</b>	Biotech - Therapeutics	Series C	\$102
<b>SparingVision</b>	Biotech - Therapeutics	Series B	\$75
<b>Gourmey</b>	Biotech - Other	Series A	\$47

The table shows the five biggest private equity financing rounds (excl. IPOs, research grants, loans) of private and independent biotechnology companies in 2022. Information displayed in the table may alter as new information is continuously received and/or new tranches to existing financing rounds are added.



# BENCHMARK REPORT: FRANCE AND OTHER EUROPEAN COUNTRIES

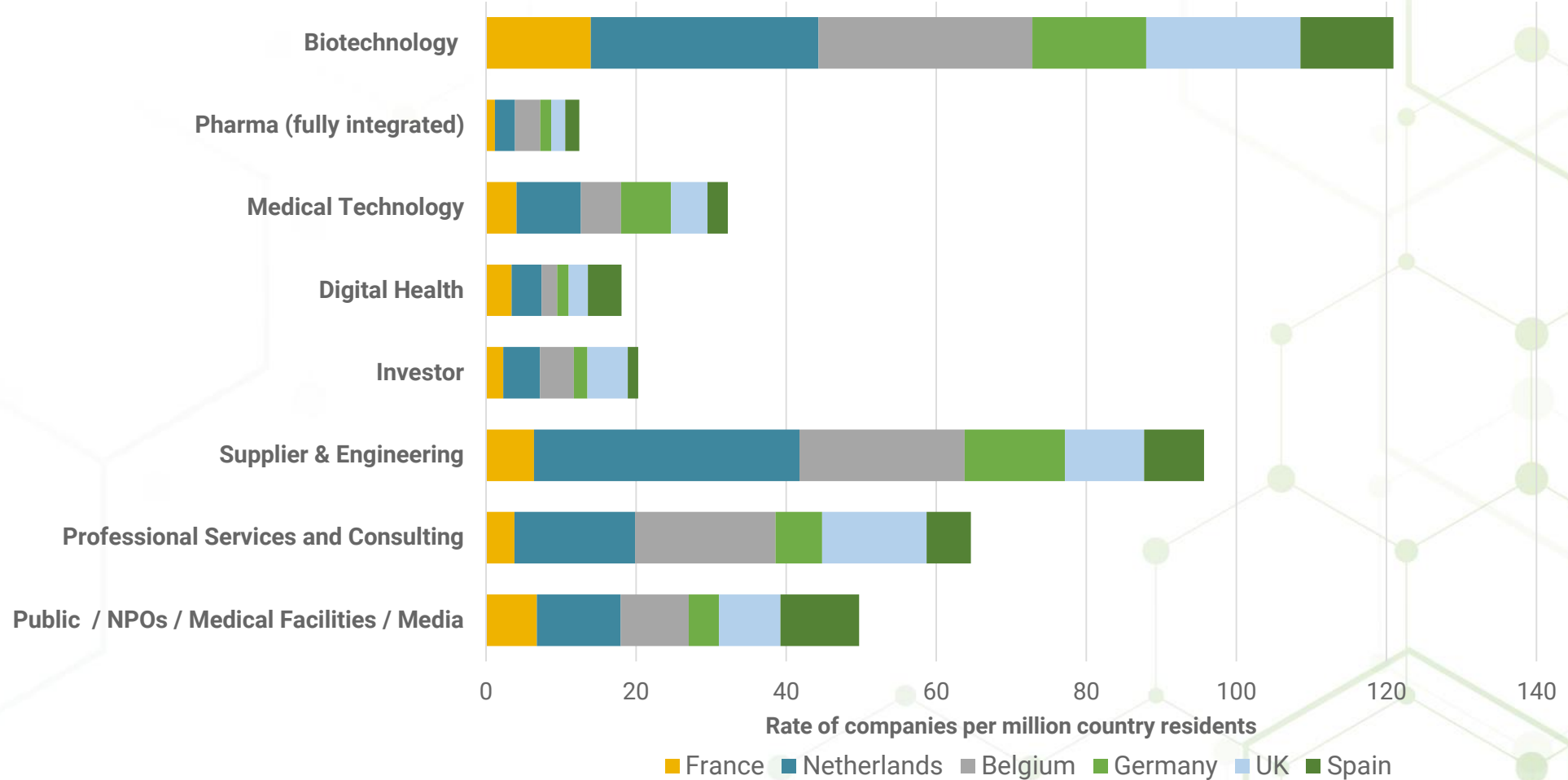
FRANCE | NETHERLANDS | BELGIUM |  
UNITED KINGDOM | GERMANY | SPAIN



# OVERVIEW OF LIFE SCIENCE COMPANIES

## LIFE SCIENCE COMPANIES BY COUNTRY AND SECTOR

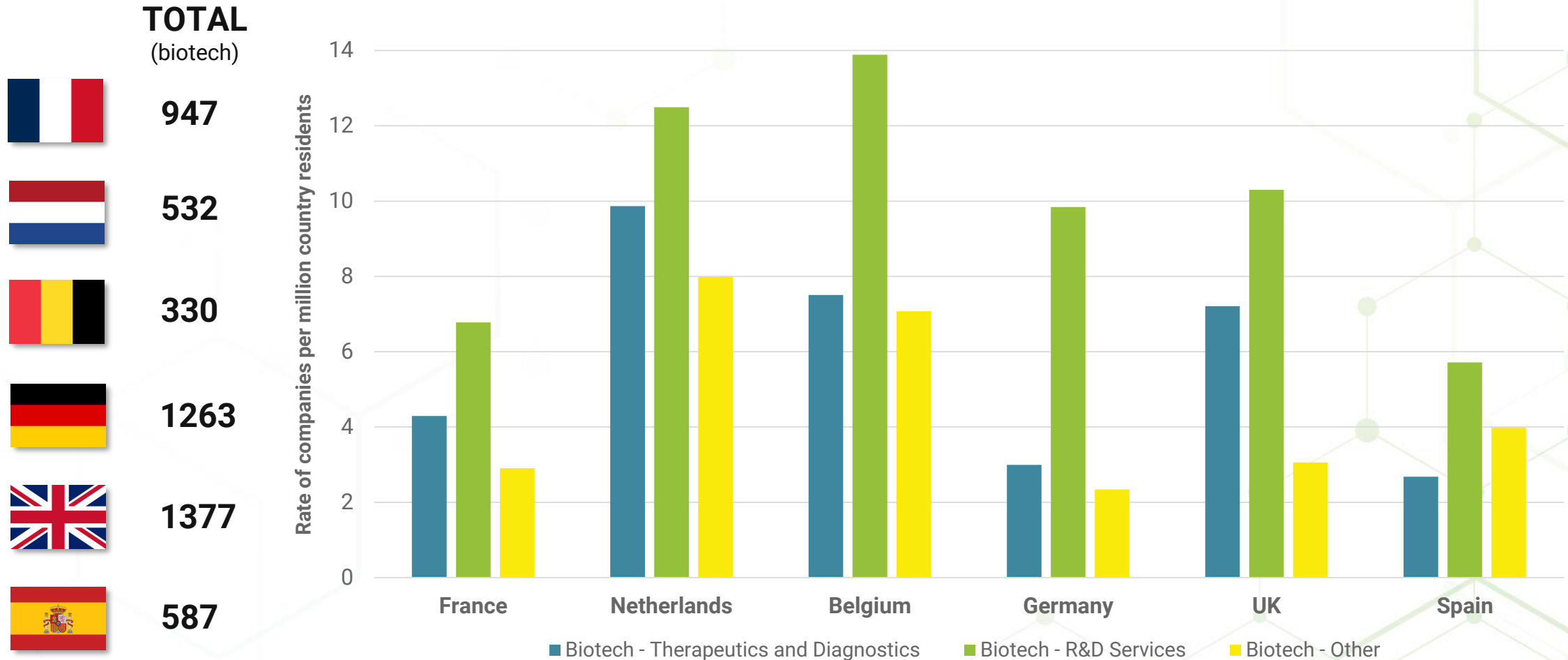
Country	TOTAL (life science)
	2843
	1983
	1084
	4175
	4555
	2238



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). For comparison, the graph shows the **rate of companies by sector per million residents** of each country. Biotechnology companies include the following categories: Biotechnology – Therapeutics and Diagnostics; Biotechnology – R&D; Biotechnology – Other. Information displayed may alter as new information is received continuously.

# OVERVIEW OF BIOTECH COMPANIES

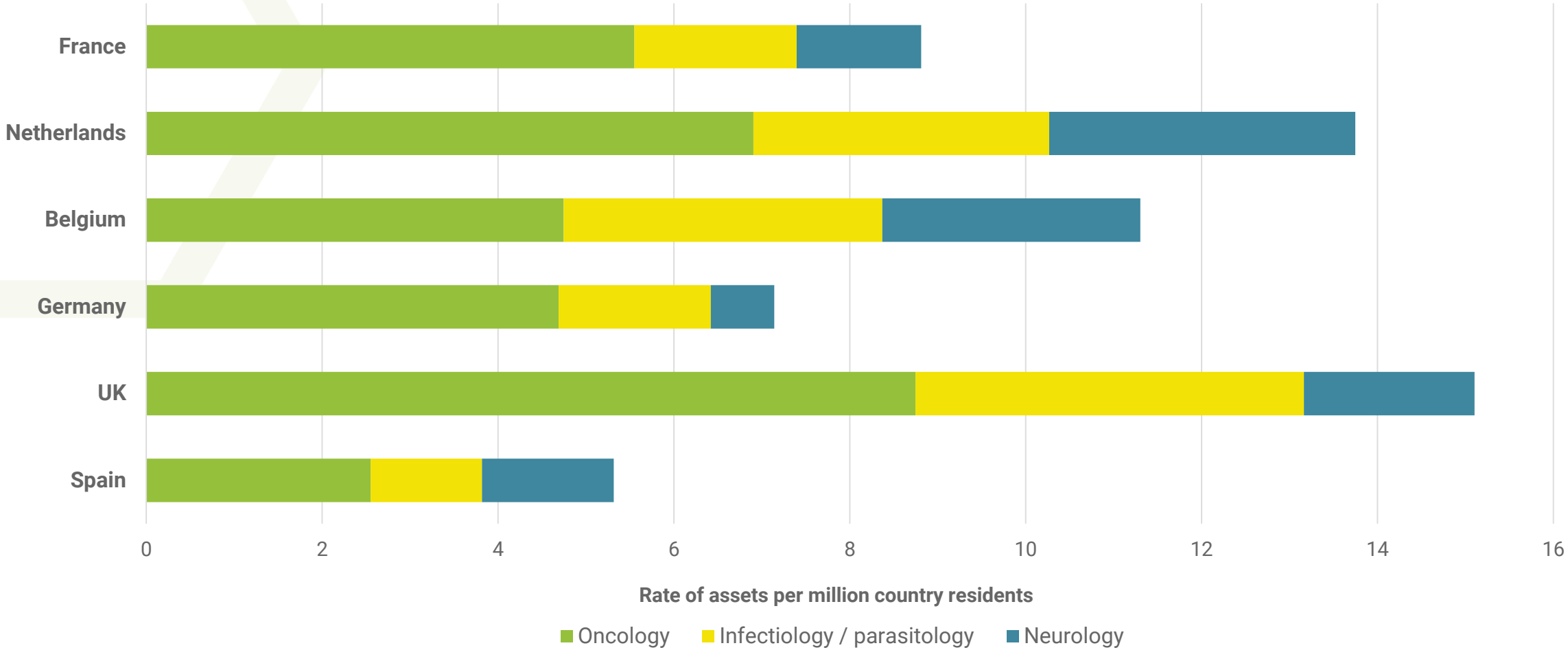
## BIOTECH COMPANIES BY COUNTRY AND SECTOR



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). Biotech companies are a subset of Life Science companies and include: Biotech - Therapeutics and Diagnostics, Biotech - R&D Services, Biotech - Others. Biotech - Other includes AgBio, cosmetics, environmental, food, industrial biotechnology, nutraceuticals, and veterinary companies. For comparison, the graph shows the **rate of biotech companies by subsector per million residents** of each country. Information displayed may alter as new information is received continuously.

# BIOTECH ASSETS IN CLINICAL DEVELOPMENT

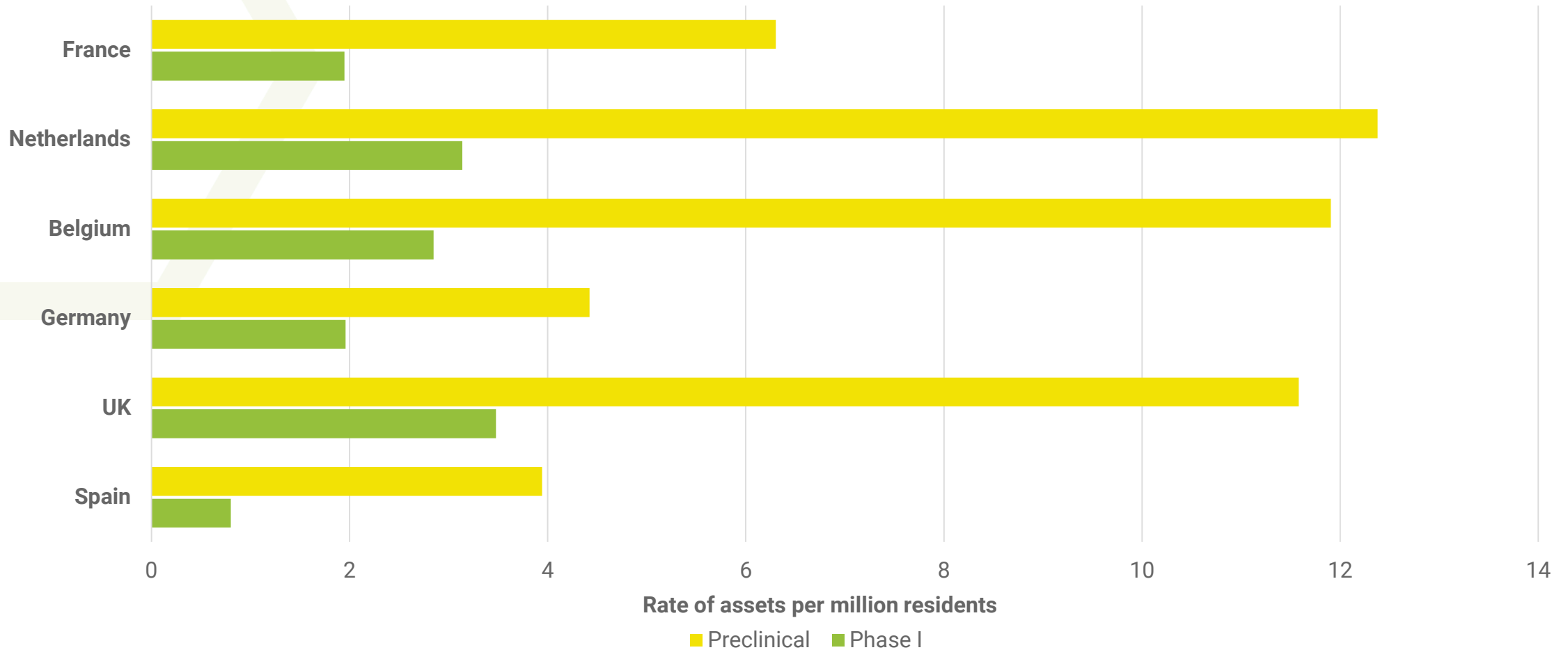
BREAKDOWN BY TOP THREE INDICATIONS OF FRANCE



The graph contains the rate of assets of Biotech – Therapeutics and Diagnostics companies (excl. of Pharma or Biotech – Others or Biotech – R&D Services companies) per million residents of each country. The top three indications of France shown are Oncology, Infectiology/parasitology, and Neurology.

# THERAPEUTICS BY DEVELOPMENT PHASE

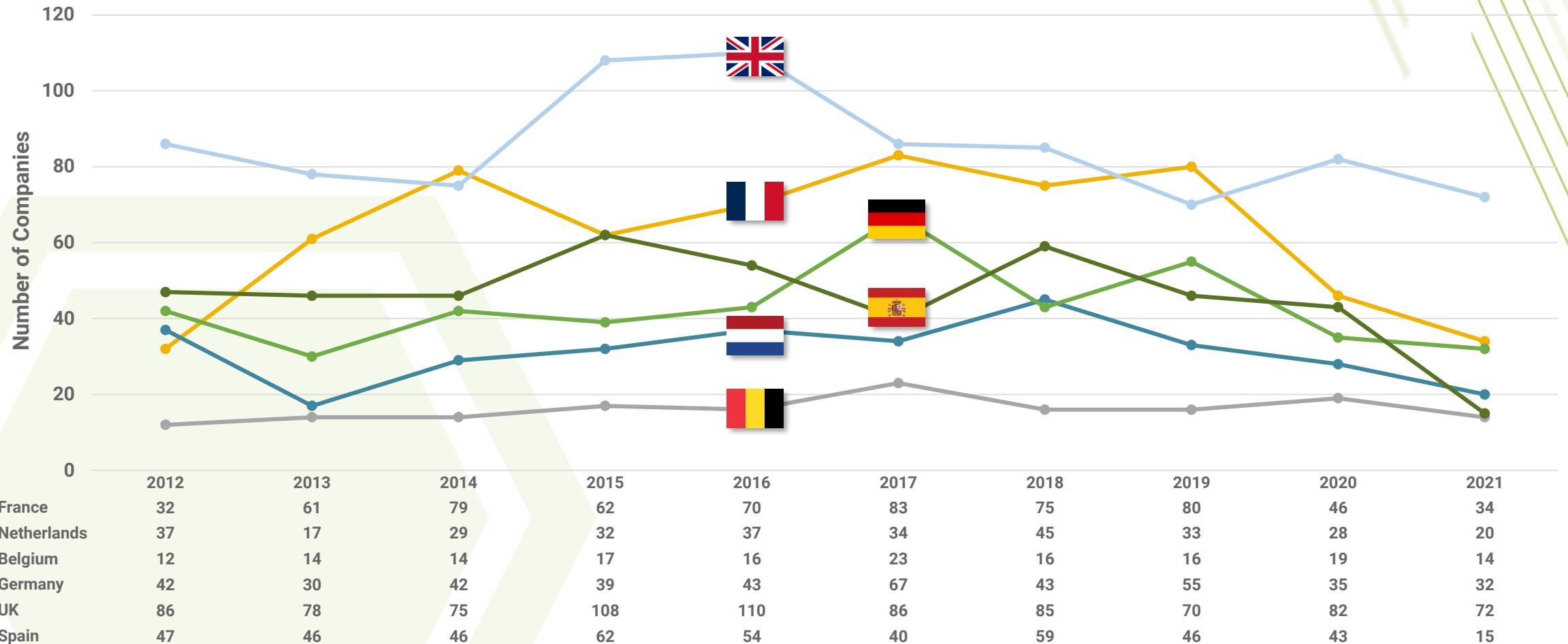
## PRECLINICAL AND PHASE I



The graph contains the rate of assets of Biotech – Therapeutics and Diagnostics companies per million residents of each country (excl. of Pharma or Biotech – Others or Biotech R&D Services companies). Products in Discovery and Lead Optimization Phase are merged into Preclinical. Information displayed in the chart may alter as new information is received continuously.

# COMPANY FOUNDATION TIMELINE

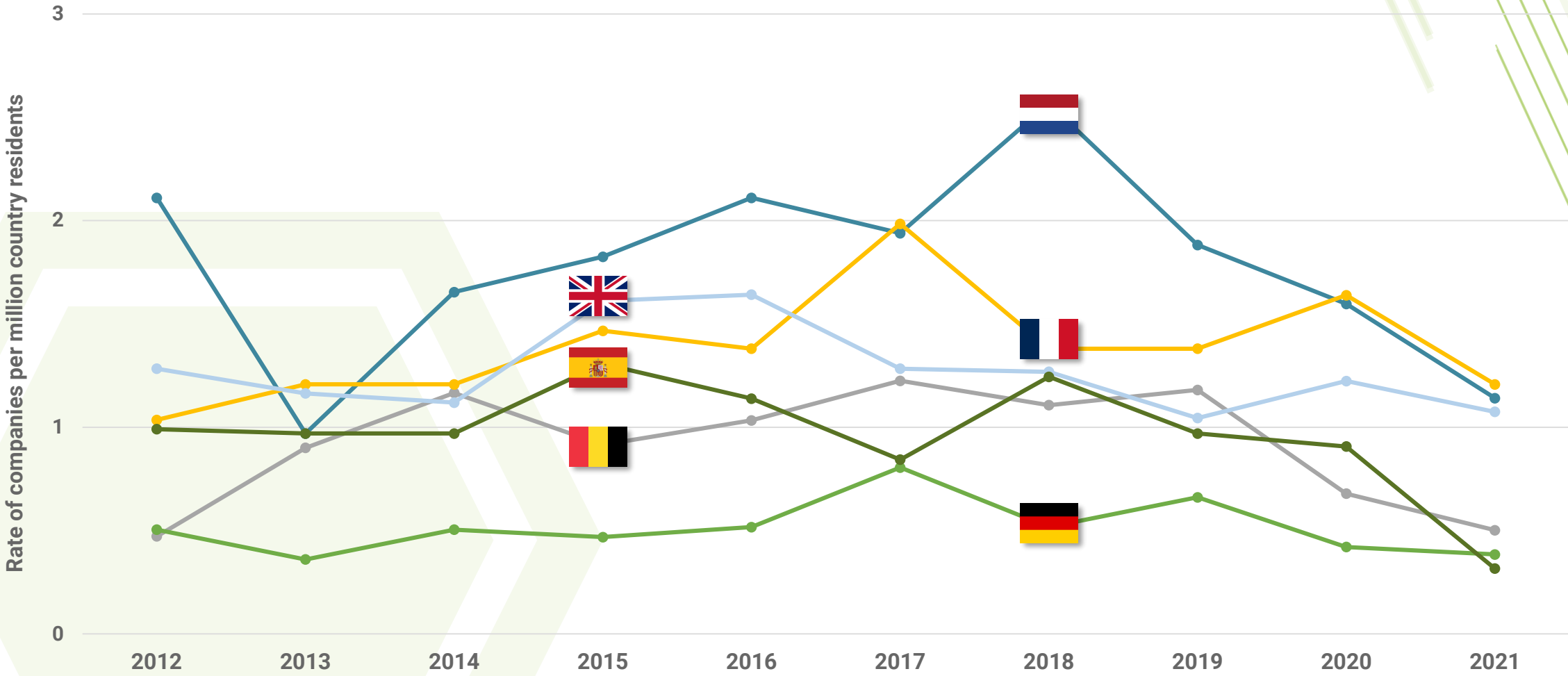
NUMBER OF LIFE SCIENCE COMPANIES FOUNDED BY YEAR | 2012-2021



The graph contains 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 2022 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.

# COMPANY FOUNDATION TIMELINE

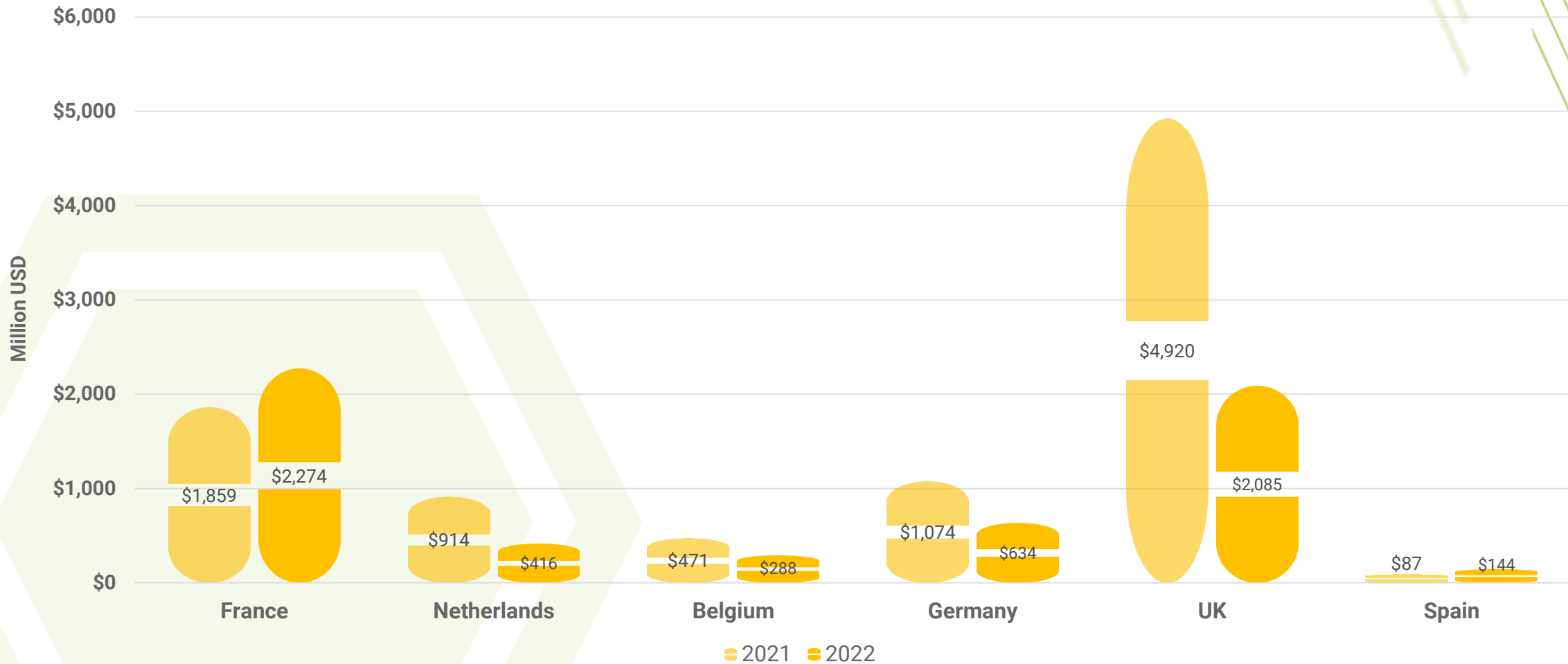
RATE OF LIFE SCIENCE COMPANIES FOUNDED BY YEAR PER MILLION RESIDENTS | 2012-2021



The graph contains the rate of privately owned or publicly listed (no subsidiaries) life science companies founded by year per million residents of each country, including Biotech - Therapeutic and Diagnostic, Biotech - R&D Services, Biotech - Others, Pharma, Medical Technology and Digital Health companies. **Companies founded in 2022 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 OF LIFE SCIENCE COMPANIES | 2021-2022

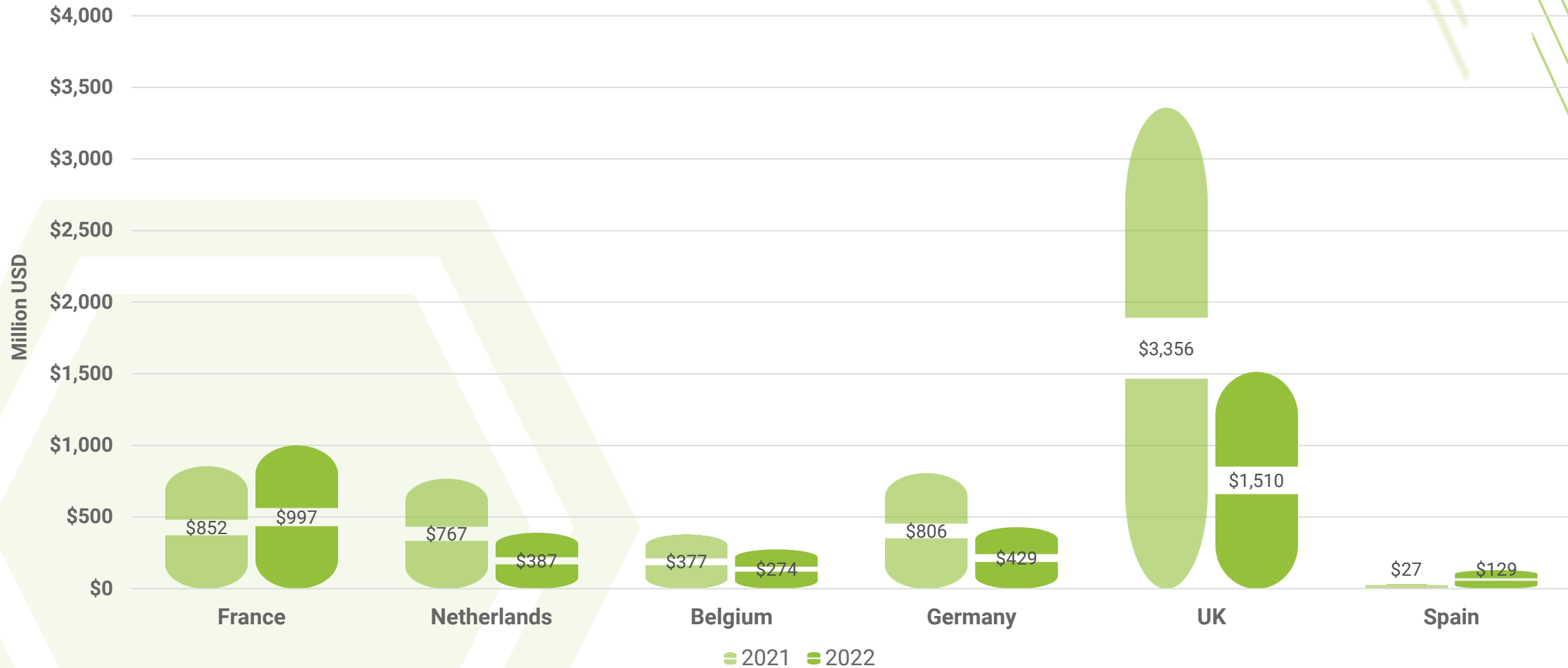


Life Science companies include Biotech - Therapeutics and Diagnostics, Biotech - R&D Services, Biotech - Others, Pharma, Medical Technology and Digital Health companies. Financing data only includes private equity rounds (excl. private placements in public companies). Data may alter as new information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



# VENTURE FINANCING OF BIOTECH COMPANIES

## PRIVATE EQUITY ROUNDS OF BIOTECH COMPANIES | 2021-2022



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). Data may alter as new information is continuously received and/or new tranches to existing financing rounds are added.

# MAJOR BIOTECH VENTURE FINANCING ROUNDS (2022)

## TOP PRIVATE EQUITY FINANCING ROUNDS | 2022

Company	Sector	Type of Round	USD M	Country
<b>InnovaFeed</b>	Biotech – Other	Series D	\$250	<b>France</b>
<b>DNA Script SAS</b>	Biotech – R&D Services	Series C	\$200	<b>France</b>
<b>Leyden Laboratories B.V.</b>	Biotech – Therapeutics	Series B	\$140	Netherlands
<b>ImCheck Therapeutics SAS</b>	Biotech – Therapeutics	Series C	\$103	<b>France</b>
<b>Ori Biotech Ltd</b>	Biotech – R&D Services	Series B	\$100	United Kingdom
<b>OMass Therapeutics</b>	Biotech – Therapeutics	Series B	\$100	United Kingdom
<b>MiroBio Ltd.</b>	Biotech – Therapeutics	Series B	\$97	United Kingdom
<b>Precirix</b>	Biotech – Therapeutics	Series B	\$89	Belgium
<b>Osler Diagnostics</b>	Biotech – R&D Services	Series C	\$85	United Kingdom
<b>SpringVision</b>	Biotech – Therapeutics	Series B	\$75	<b>France</b>

The table shows the ten biggest private equity financing rounds (excl. IPOs, research grants, loans) of private and independent biotechnology companies in 2022. 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 leading **business development and licensing database** for the entire life science industry, offering a wealth of information on over 65,000 life science company profiles. Thanks to its unique data sourcing process, the profiles include company descriptions, contact information, product pipeline information, financing rounds, and management details, making it an invaluable resource for big pharma, start-ups, investors, and other industry professionals. Biotechgate also features 25,000 **licensing deals** and a **clinical trials database** containing over 750,000 records from registries 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).

# 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)