

Life Science Industry in Austria

Advancing life science at the heart of Europe

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Agenda



- › Life Sciences in Austria – Fields of Excellence
 - › Therapeutics
 - › Medical Technology
 - › Production and Platform Technologies
 - › Advanced Diagnostics and Analytics
 - › Basic Research
- › The Austrian Life Sciences in Figures
- › Life Science Opportunities in Austria



Life Sciences in Austria

Fields of Excellence



Life Sciences in Austria

Fields of Excellence



Austrian life science companies and research organizations are renowned for their innovations in the following fields:

> Therapeutics

Cancer: the major medical challenge in Europe today
Infectious diseases: vaccines and anti-infectives

> Medical technology

Keeping a step ahead with Austrian components
Surveying the device innovators

> Production and Platform Technologies

Better, faster, cheaper

> Advanced Analytics and Diagnostics

The diagnostic value chain



Therapeutics *Challenge Cancer*



- › Austria is at the forefront in the fight against cancer in Europe and plays a leading part in the worldwide campaign with several pioneering initiatives.
- › Be it innovative immunotherapy, novel molecular targets or radiation therapy, researchers and oncologists throughout Austria are working to develop and commercialize diagnostics and treatments.



ACTIVARTIS



AOP ORPHAN
FOCUS ON RARE DISEASES

APEIRON
BIOLOGICS



**Boehringer
Ingelheim**



COMPREHENSIVE
CANCER
CENTER VIENNA

MARK53

ONCOLAB
Diagnostics GmbH | solutions for personalized medicine



oncotyrol
Center for Personalized Cancer Medicine



SANOCHEMIA
Pharmazeutika AG
The Specialty Pharma Company

**Tube
Pharma**



ViraTherapeutics





Therapeutics

Leading the fight against global pandemics and local infections / Vaccines



- › Offering solutions to combat the increasing worldwide spread of dangerous pathogens, a number of highly innovative Austrian companies are transforming the world of antibiotic therapy or working on novel vaccines and therapeutics, including those that deal with the threat of pandemic flu and other infectious diseases.



*This logo list is not intended to be exhaustive.



Therapeutics

Other fields (among others)



› Respiratory Diseases:



› Allergies:



› Regenerative Medicine:



› Other:





Medical Technology: *Keeping a step ahead with Austrian components*



- › Medical devices and related technologies have always been a strong part of the life science industries in Austria.
- › From large international device companies, individual businesses with a single device and multiple companies supplying parts and know-how, Austrian industry embraces every stage in the value chain.





Production and Platform Technologies

Better, faster, cheaper



- › Austria has a wide variety of companies providing enabling technologies across the whole value chain of production processes.
- › Close cooperation between universities, research centres and industry as well as highly trained and experienced local scientists, experts and technicians ensure the highest quality of products and services.





Advanced Diagnostics and Analytics

The diagnostic value chain



- › Austria has been at the forefront of developments in the diagnostics sector, from the discovery of biomarkers through to the manufacture of equipment for IVD diagnostics and the actual handling of specimens for analysis.
- › Right down the value chain, Austria is innovating in diagnostics and it is the interplay between Austrian companies and some of the leading global diagnostic companies that gives Austria such a pivotal position in this industry.

B|BRAUN
SHARING EXPERTISE

beSurence
... good to be sure

BIOCRATES
LIFE SCIENCES


greiner bio-one


IONIMED
ANALYTIX



kiweno

LEXOGEN

 PLATOMICS

 VASEMA





Basic Research

Universities and applied research infrastructure



- > 17 universities, 13 universities of applied sciences and 25 non-university research institutes provide the basis of Austria's life science innovations



*This logo list is not intended to be exhaustive.



The Austrian Life Sciences in Figures



Austrian Life Sciences 2012

Facts and Figures



723
companies

50,180
employees

17.73
bn. EUR
Turnover



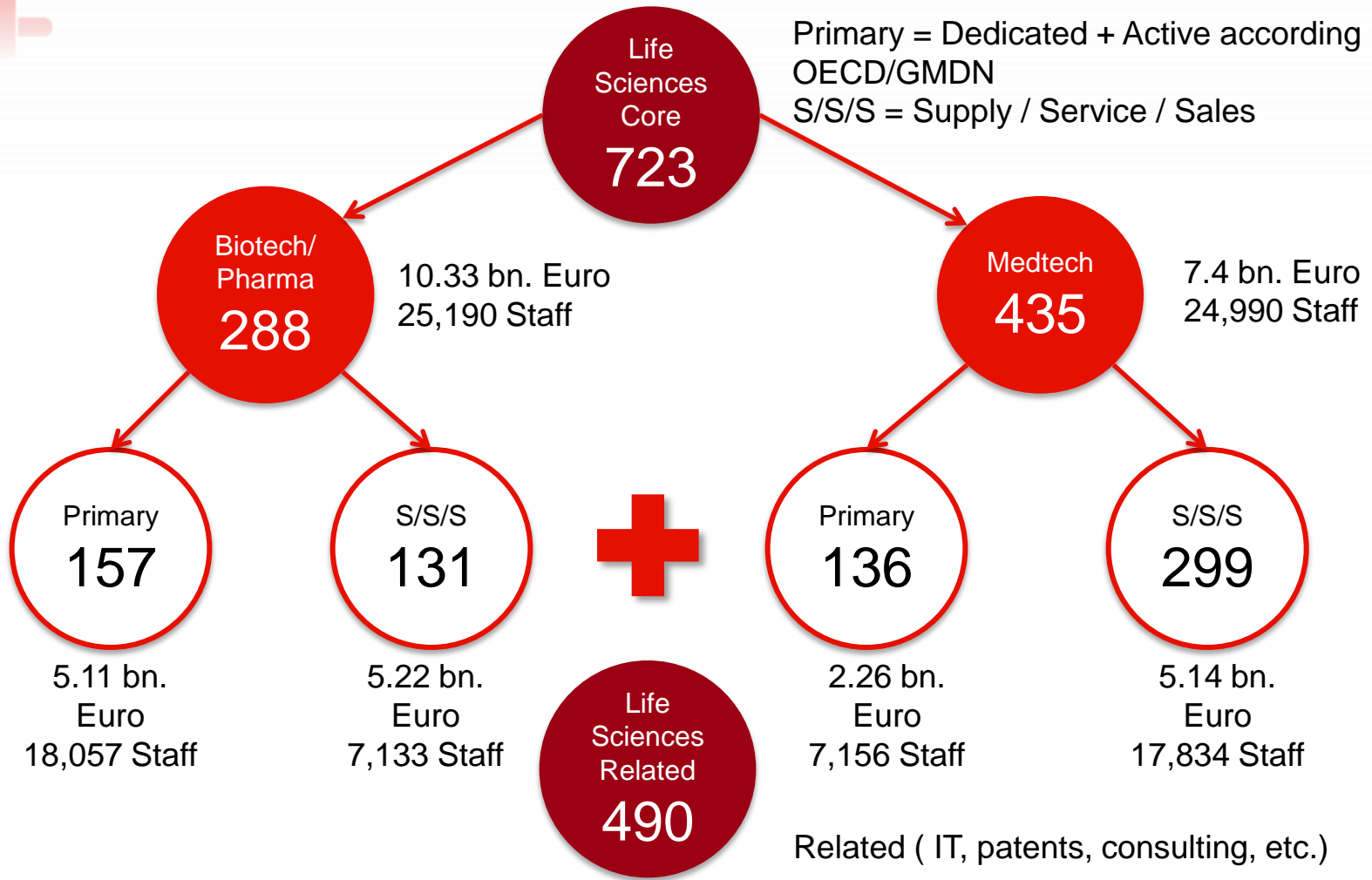
Turnover
equals about
5.4%
of the gross
domestic
product





Austrian Life Sciences 2012

Facts and Figures





Austrian Dedicated Biotechnology Sector

Facts and Figures



- › In 2012, there were 95 companies occupied wholly with biotechnology. This is a marked increase (+23%) compared to 2010.
- › The average dedicated bio-tech company is just eight years old.

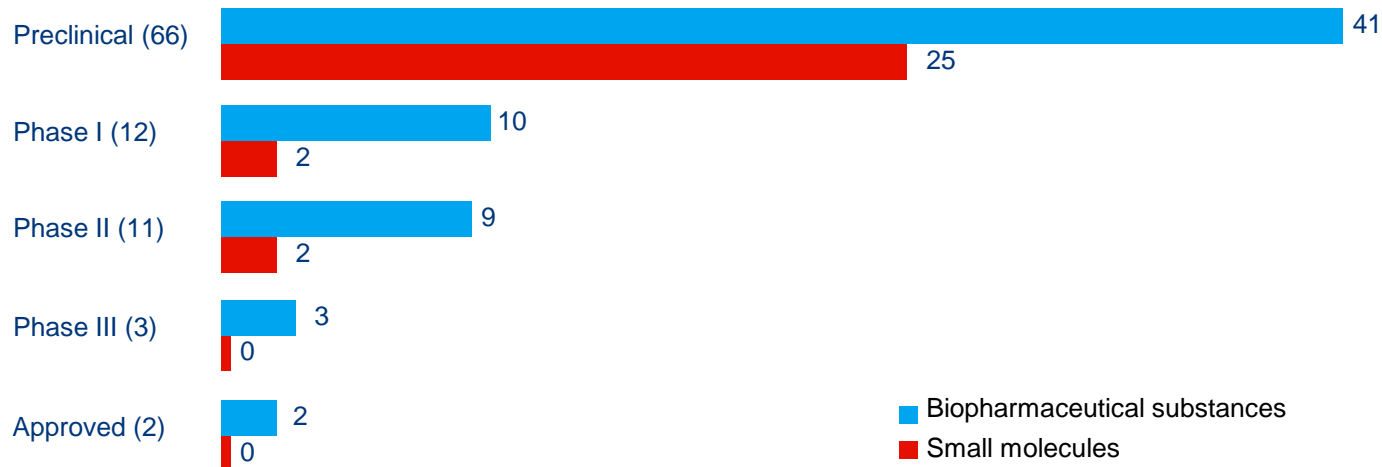




Austrian Dedicated Biotechnology Sector *Clinical Pipeline*



- › In 2012 there were 92 compounds in clinical development.
- › Compared to 2010, the pipeline has grown by 12 compounds (+15%).
- › 63 of the substances are biopharmaceutical drug candidates.
- › The majority of drug candidates are in the preclinical phase.
- › 22 biotherapeutic agents and 4 small molecules have reached the more advanced stages of drug development and are being tested in humans.



Life Science Opportunities in Austria



Examples of recent life science deals in Austria



dutalys

Acquired by Hoffmann-
La Roche/MS-Deal
488 m. USD
(12/2014)

Savira

License deal
with Roche
240 m. EUR
(05/2012)

Apeiron

Strategic collaboration
with Sanofi and
Evotec
>200 m. EUR
(08/2015)

Nabriva

VC investment
120 m. USD
(04/2015)

Hookipa

VC investment
27.5 m. USD
(11/2013)

Arsanis

VC investment
20 m. USD
(09/2013)

Themis

VC investment
10 m. EUR
(05/2015)

Haplogen Genomics

Acquired by Horizon
7.7 m. EUR
(01/2015)

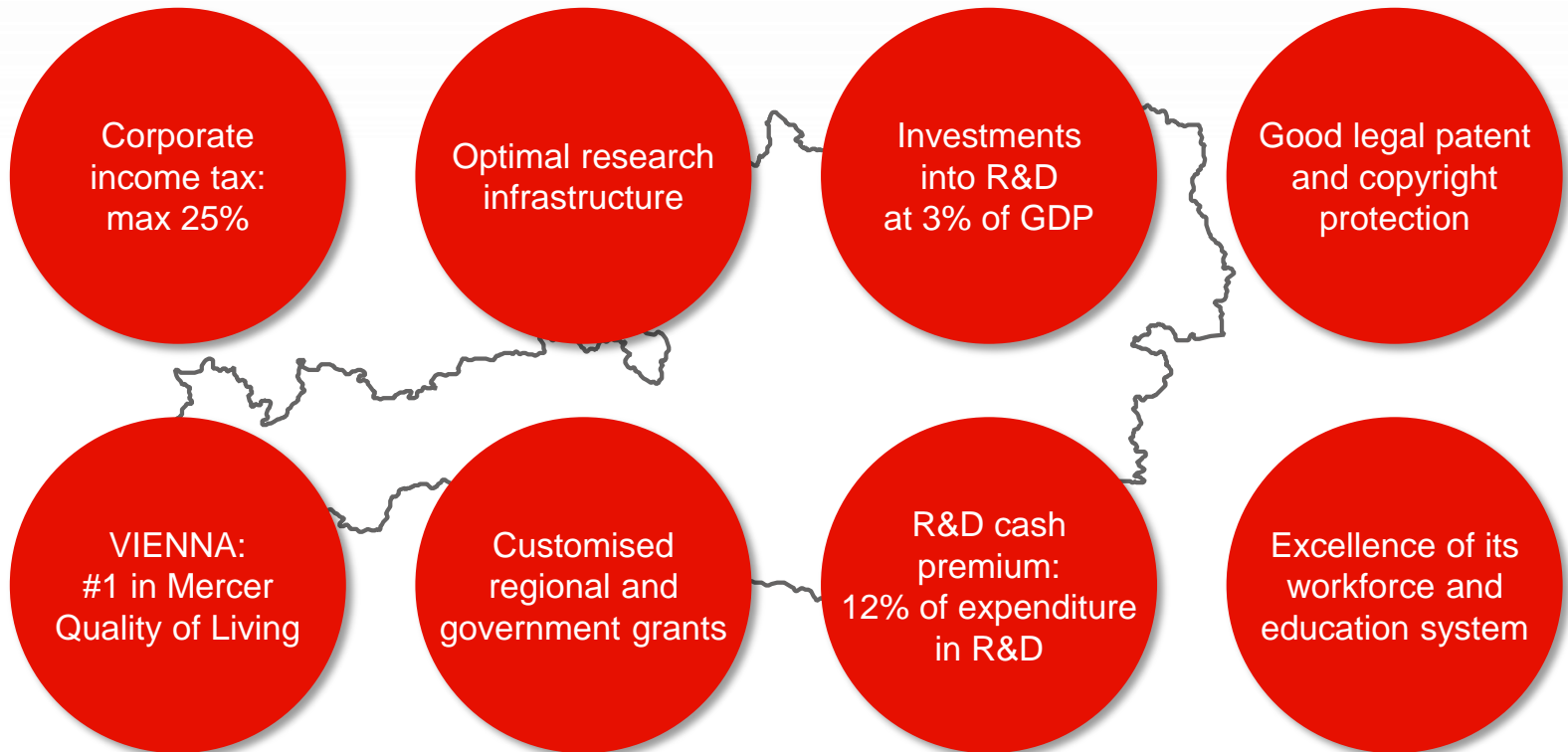
On top of these deals, a large number of VC firms and corporate ventures invest in Austrian life science companies





Life Sciences in Austria

Austria – the place to do business





Life Science Opportunities in Austria



- › Equity investment in innovative Biotech-/Medtech-start-ups
 - › Business Angel, VC, Corporate Venture
 - › Portfolio of 40-50 companies
- › In-licensing of Austrian technology to Israel market
- › Distribution/sales partner for Austrian company in Israel
- › Using Austria as regional headquarter for European operations
- › Creating a life science start-up in Austria
 - › aws (Grants, Loans, Equity, Fund of Fund)
 - › FFG (Grants, Loans)
 - › Regional Funding Agencies
- › Research partnership (applied or basic research)

Life Science Austria

Advancing Austrian life science at the heart of Europe

Meet us@ CPhI Madrid 2015, BioEurope Munich 2015, Medica Düsseldorf 2015, Arab Health Dubai 2016, Health IT Conference 2016 Las Vegas, BioEurope Stockholm 2016, BIO San Francisco 2016...and anytime in Austria!

Find out more:

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