

LIFE SCIENCE TREND ANALYSIS

NETHERLANDS | 2023

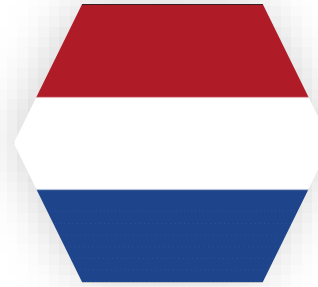
**BIOTECH
GATE** 
BUSINESS DEVELOPMENT
DATABASE



VENTURE VALUATION
GLOBAL VALUATION SERVICES

Holland
BIO

APRIL 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



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

www.dutchlifescience.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.

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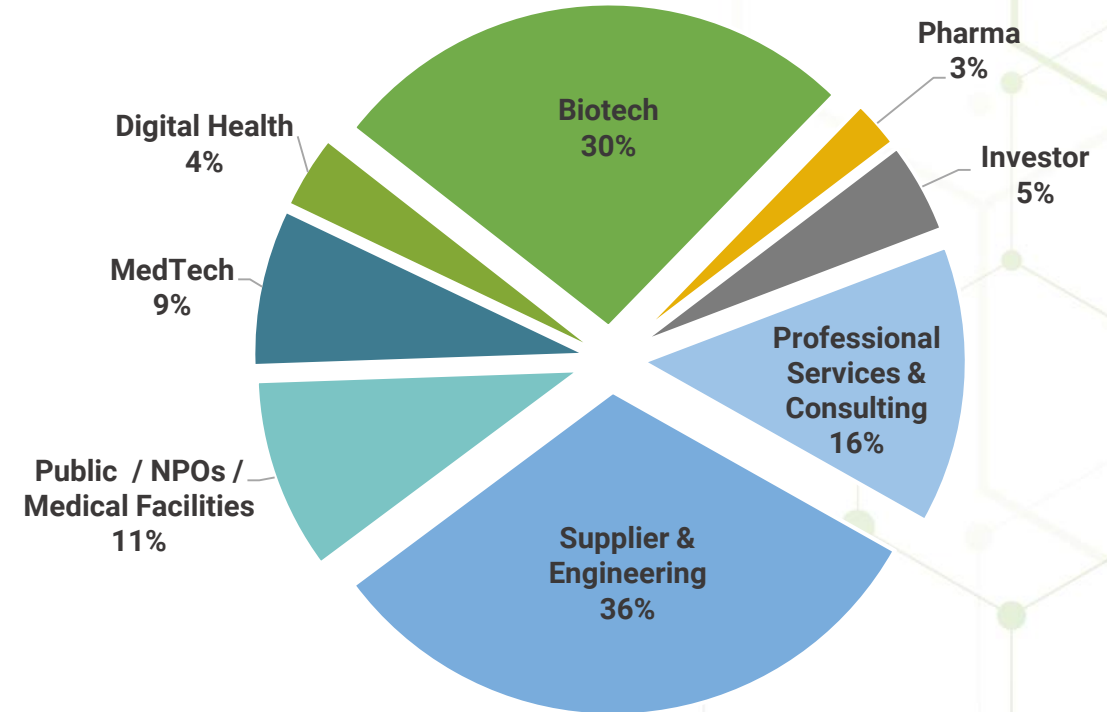


HollandBIO connects, supports, and represents over 270 medical, agro-food, and industrial biotech companies. Their members are active in all phases of research and development and include all company sizes: start-ups, SMEs, listed companies and multinationals.

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

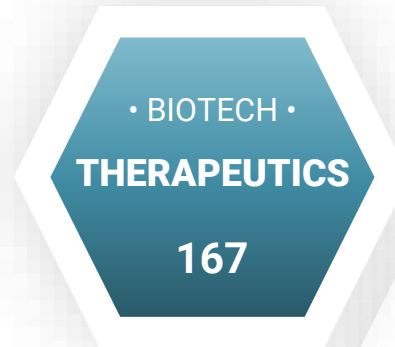
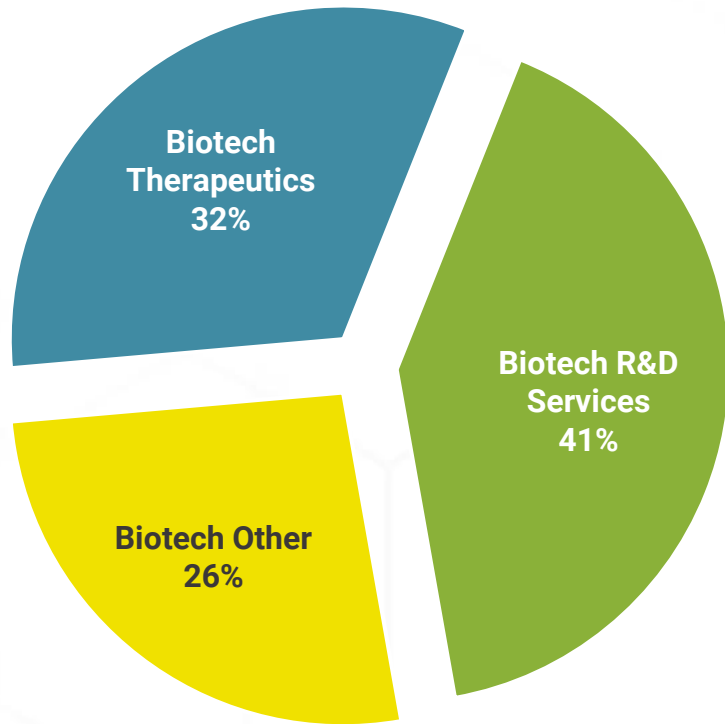
NUMBER OF COMPANIES BY SECTOR



For the definition of categories please visit www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html. 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

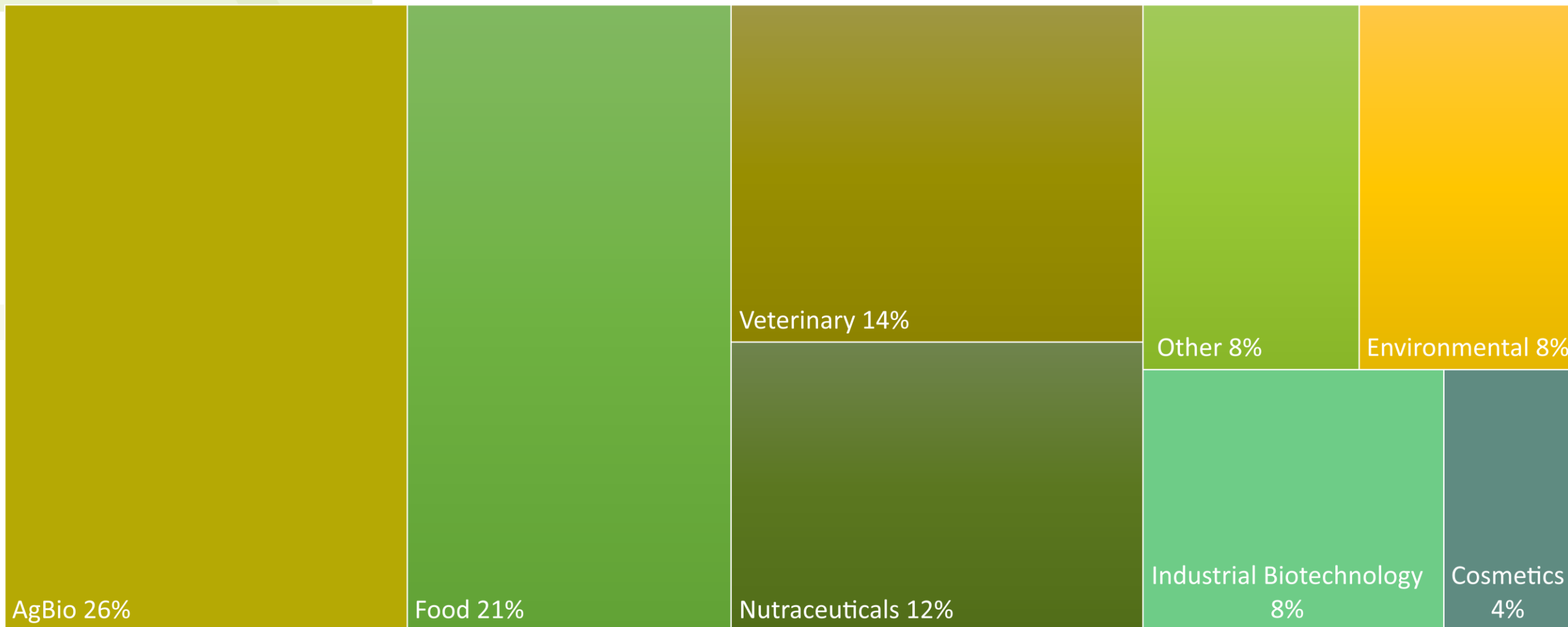
OVERVIEW OF BIOTECH COMPANIES

NUMBER OF COMPANIES BY SECTOR



BIOTECH - OTHER COMPANIES BY KEY ACTIVITIES

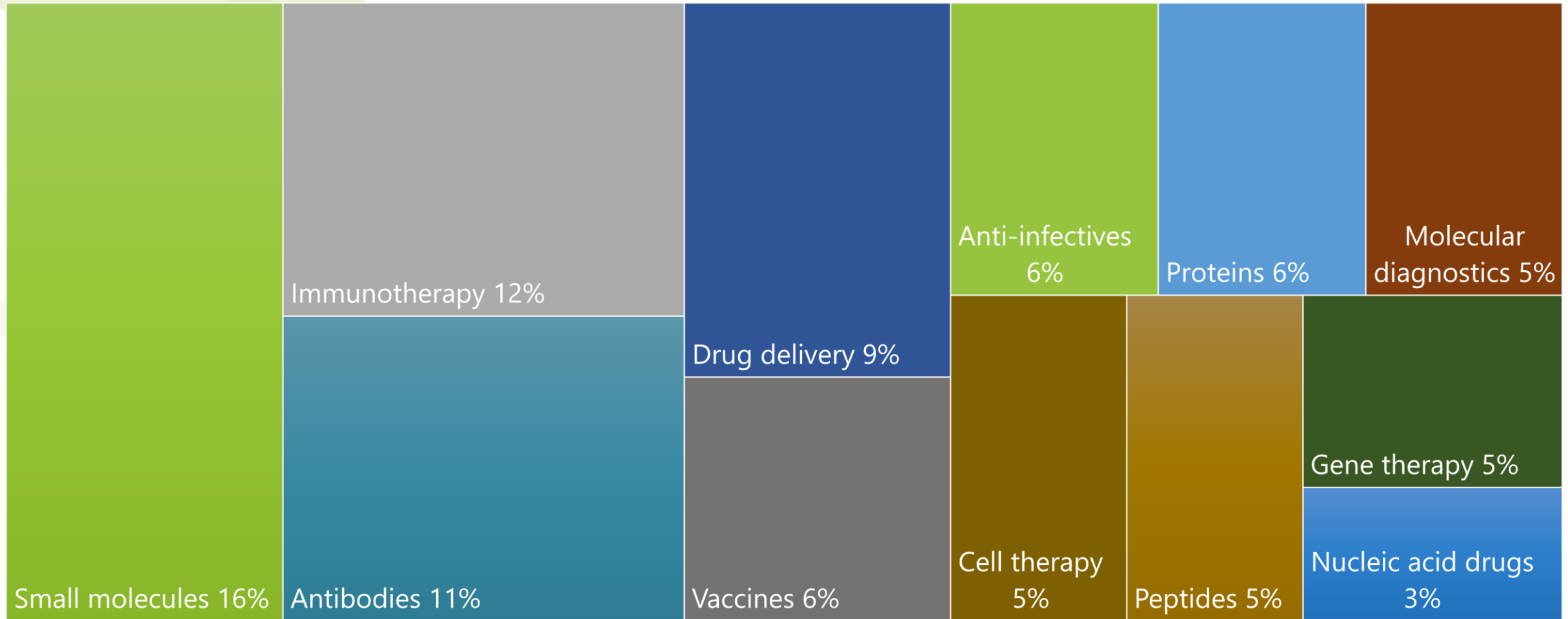
AS PERCENTAGE OF TOTAL NUMBER OF BIOTECH - OTHER COMPANIES



For **136** Biotech - Other companies there were **199** subsectors (key activity areas) assigned (one biotech company can be active in multiple areas). The graph displays Biotech - Other 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. 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

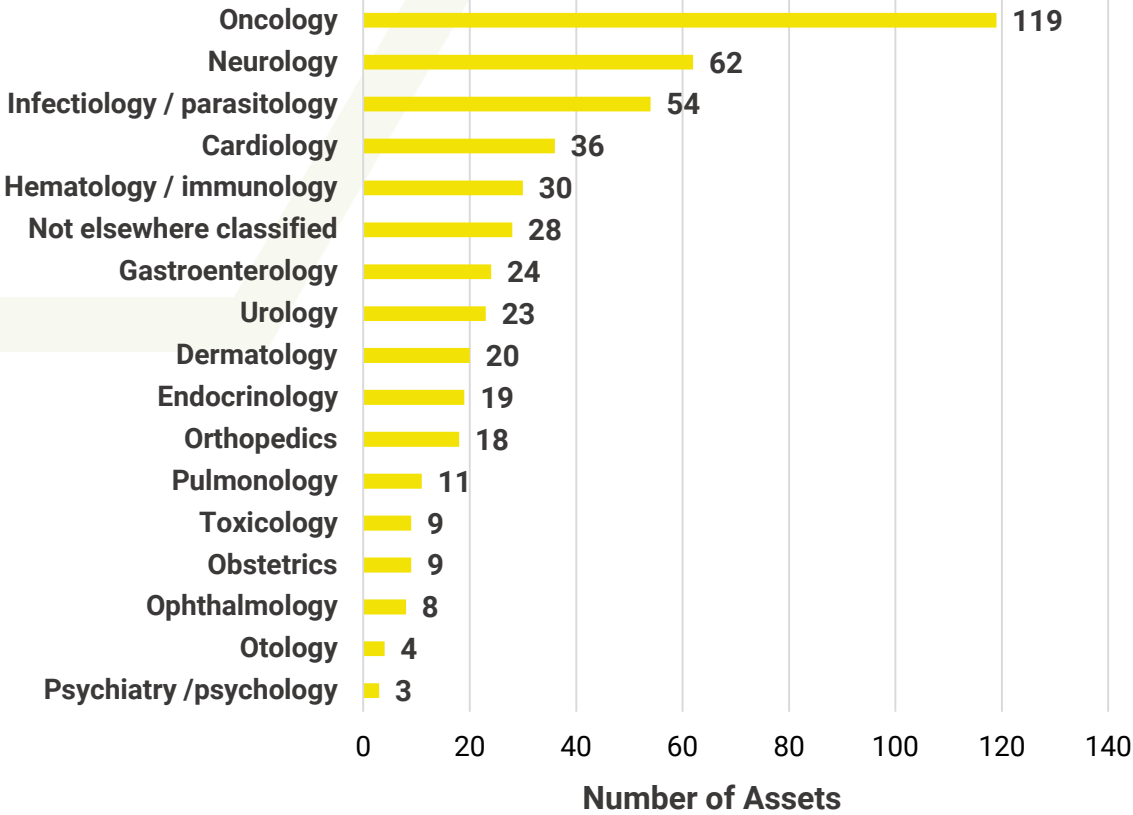


For 167 Biotech Therapeutics companies there were 284 subsectors (key activity areas) assigned (one biotech company can be active in multiple areas). The graph displays Biotech – Therapeutics and Diagnostics subsectors as the percentage of the total number of Biotech – Therapeutics and Diagnostics subsectors 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.

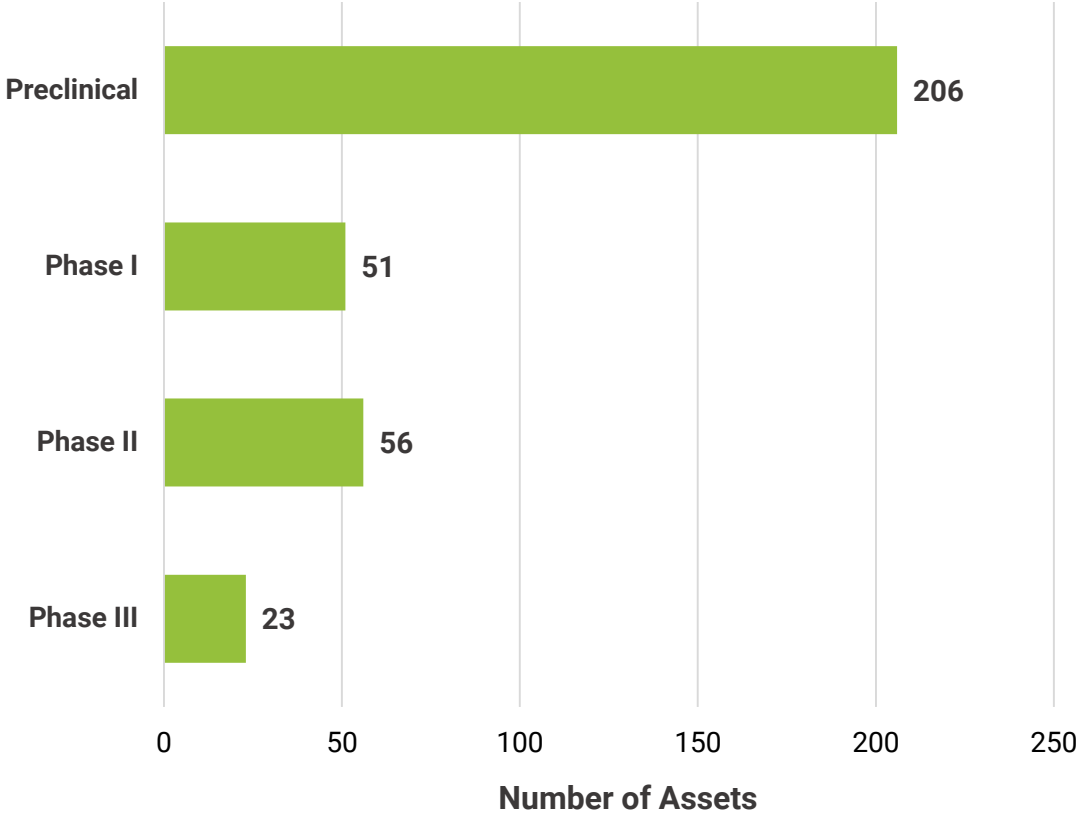
BIOTECH ASSETS IN CLINICAL DEVELOPMENT

BY INDICATION AND DEVELOPMENT PHASE

BREAKDOWN BY INDICATION



BREAKDOWN BY DEVELOPMENT PHASE

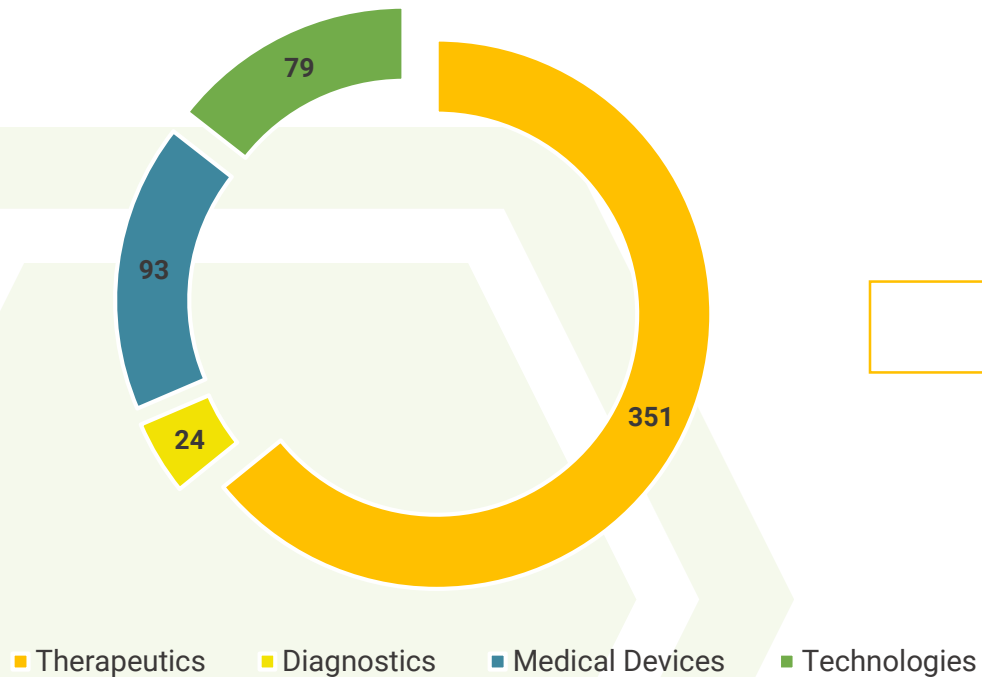


Both graphs contain the number of assets of Biotech – Therapeutics and Diagnostics companies (excl. of Pharma or Biotech – Others or Biotech R&D Services companies). Products in Discovery and Lead Optimization Phase are merged into Preclinical; Development Phase I/II trials are merged into Phase II and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

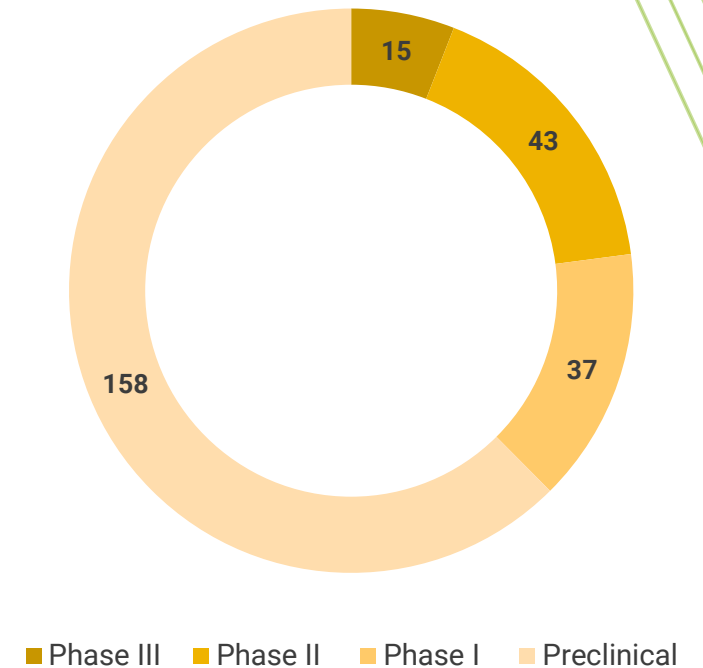
ASSETS AVAILABLE FOR OUT-LICENSING

NUMBER OF ASSETS

BY ASSET CLASS



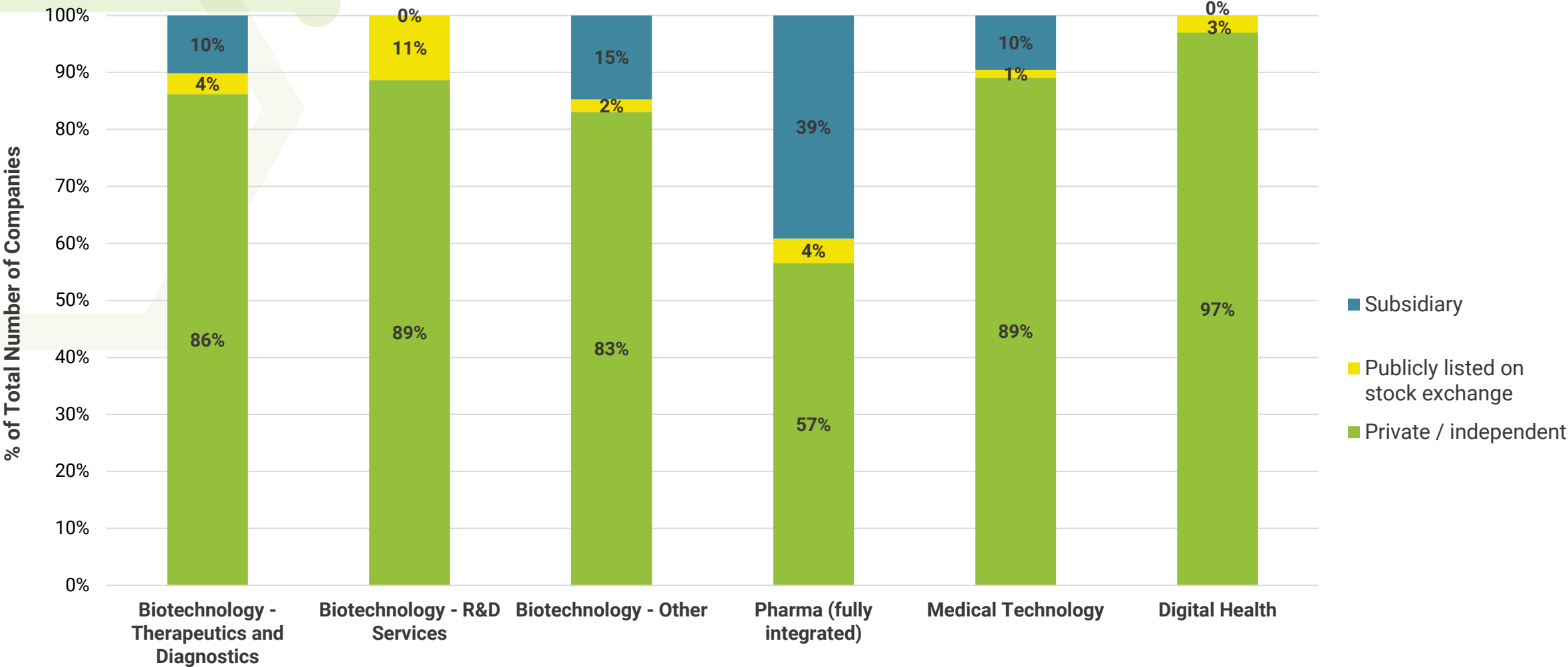
THERAPEUTICS IN DEVELOPMENT BY DEVELOPMENT PHASE



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

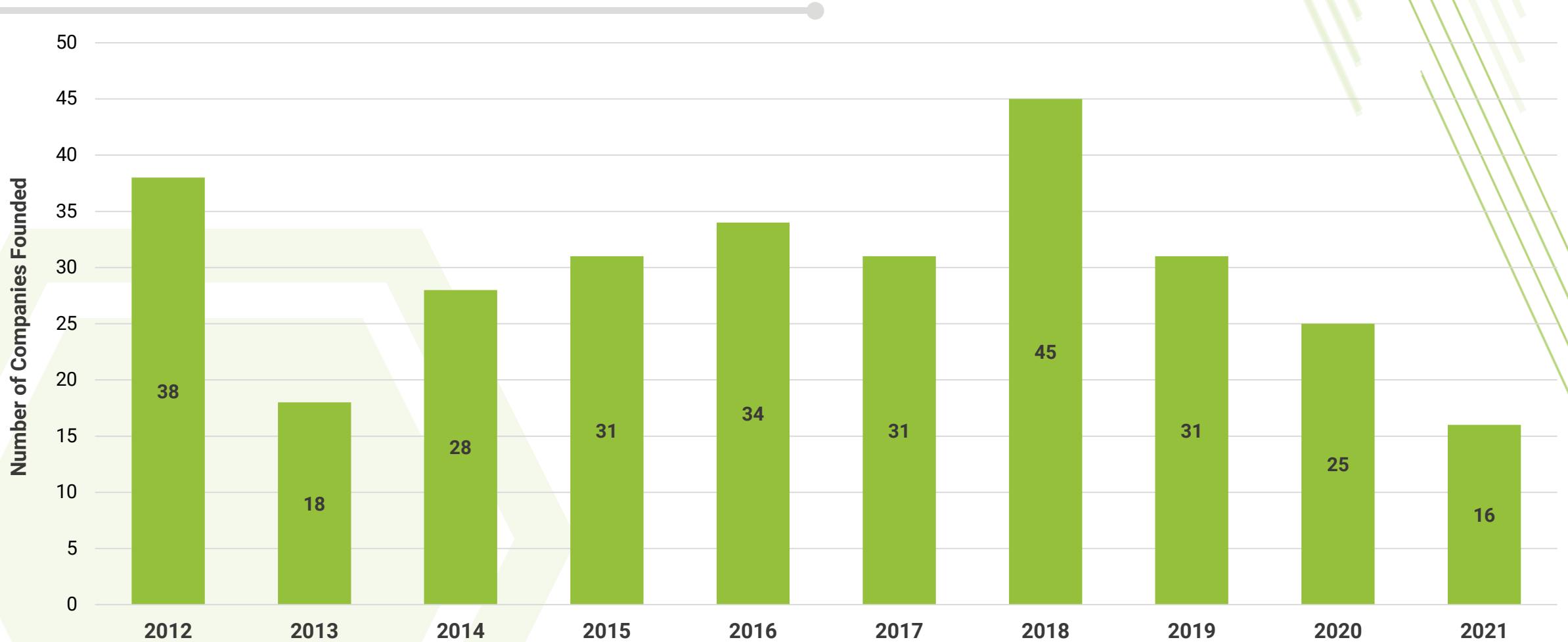
PERCENTAGE OF TOTAL NUMBER OF COMPANIES BY OWNERSHIP AND SECTOR



For the definition of categories please visit www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html. 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

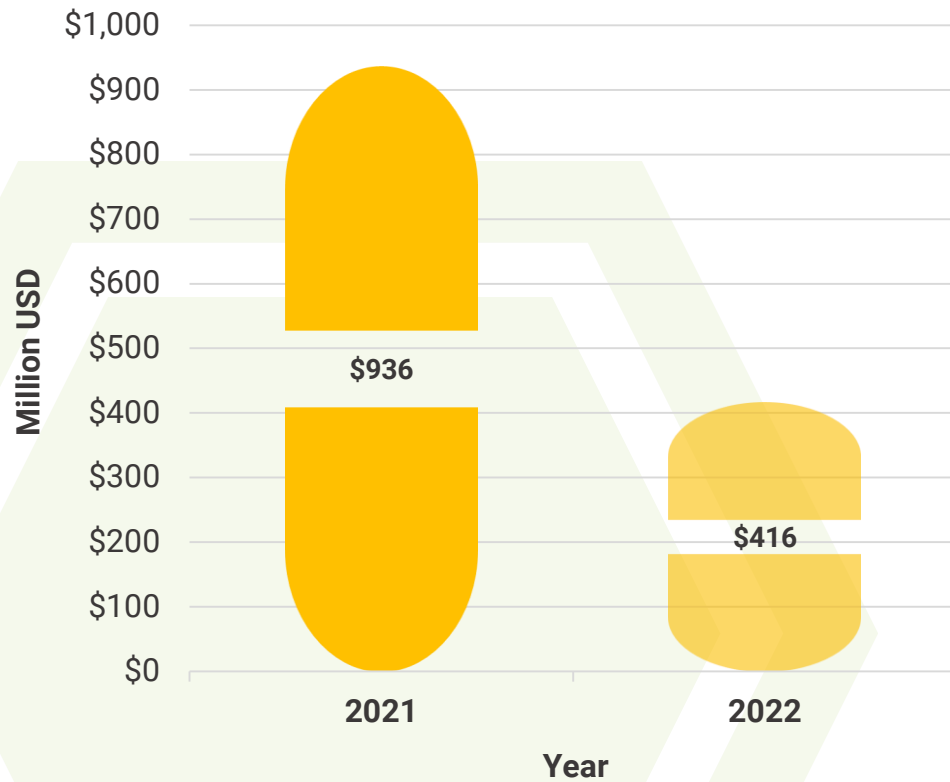


The graph contains the number of privately owned or publicly listed (no subsidiaries) life science companies founded by year including Biotech - Therapeutic and Diagnostic, Biotech - R&D Services, Biotech - Others, Pharma, Medical Technology and Digital Health companies. **Companies founded in 2022 were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

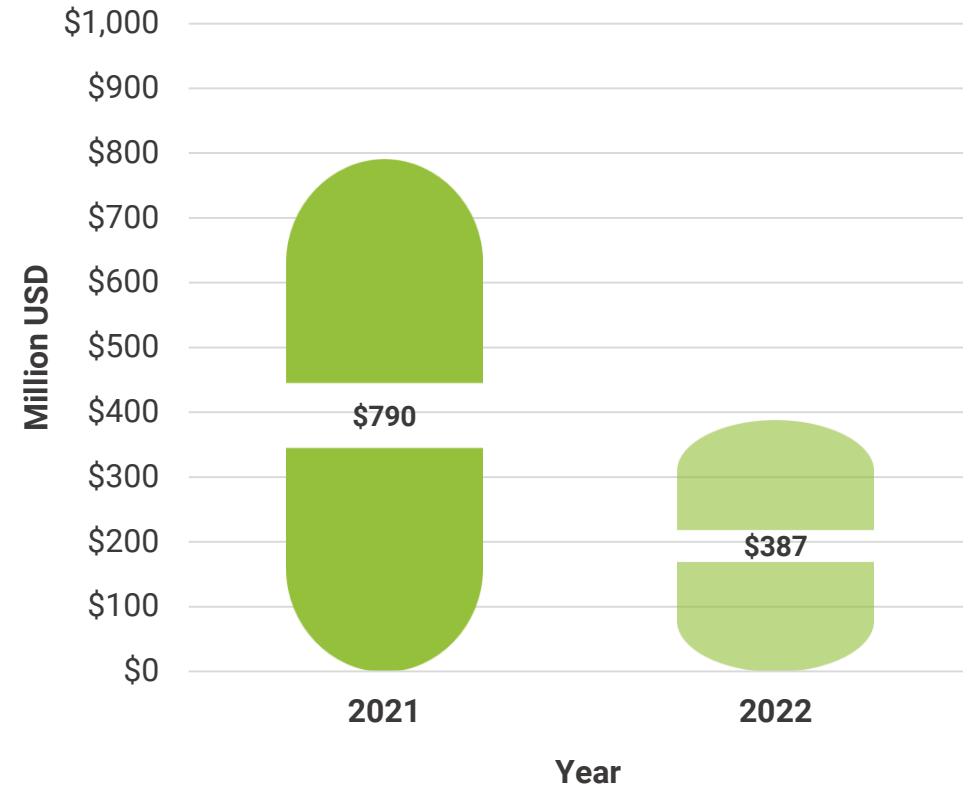
VENTURE FINANCING OF LIFE SCIENCE COMPANIES

PRIVATE EQUITY ROUNDS | 2021-2022

LIFE SCIENCE COMPANIES



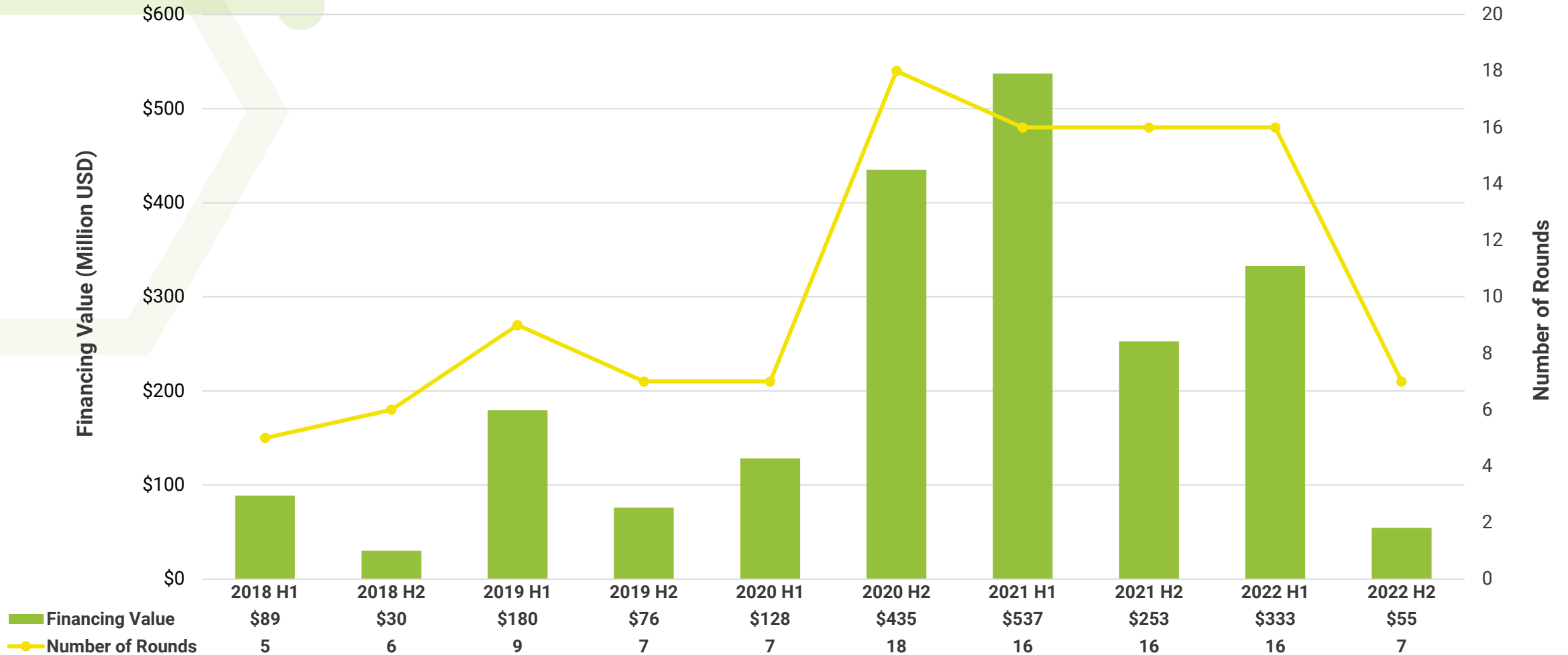
BIOTECH COMPANIES



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

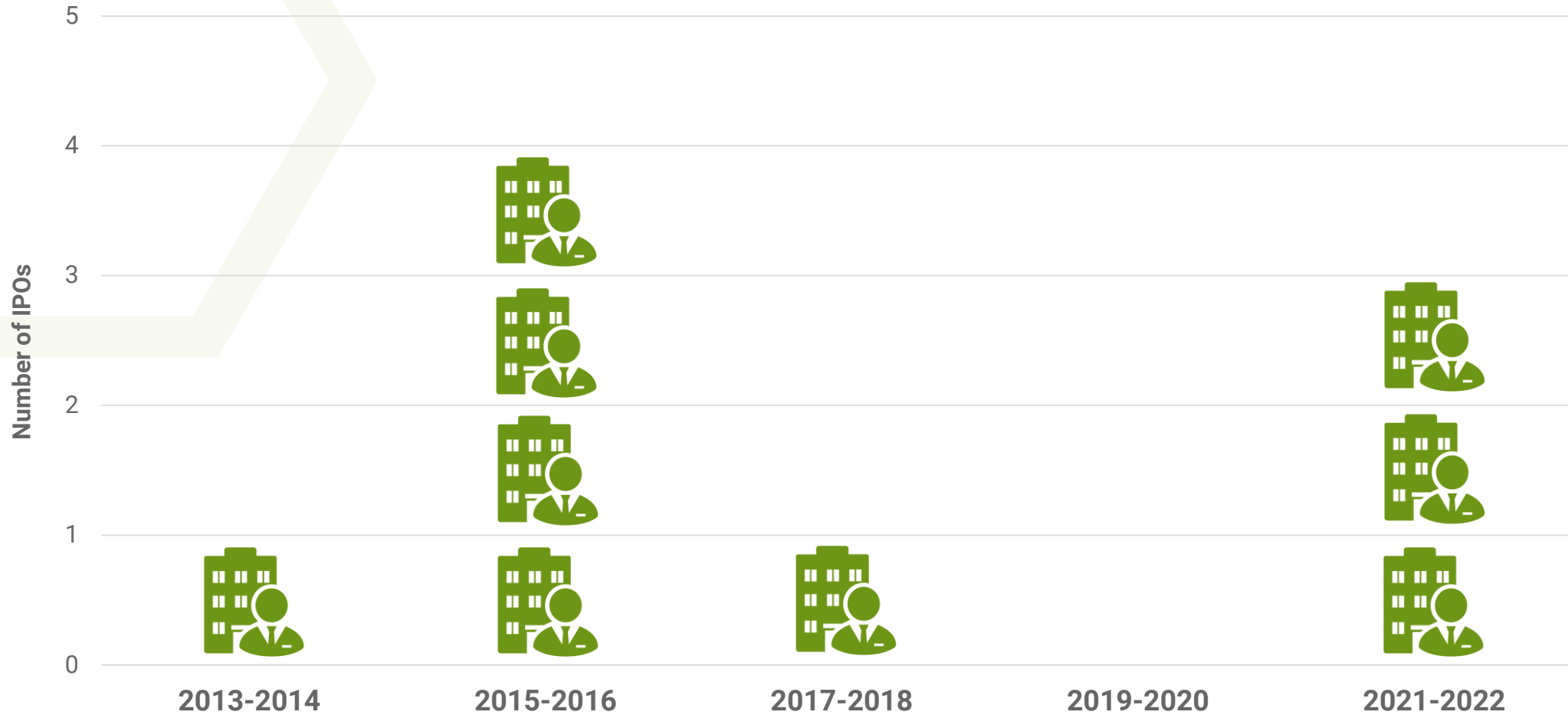
PRIVATE EQUITY ROUNDS – 5 YEAR REPORT



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 DUTCH BIOTECH COMPANIES THAT WENT PUBLIC WORLDWIDE | 2013-2022



Included are Biotech – Therapeutics and Diagnostics, Biotech – R&D Services, and Other Biotech companies.

MAJOR BIOTECH VENTURE FINANCING ROUNDS (2022)

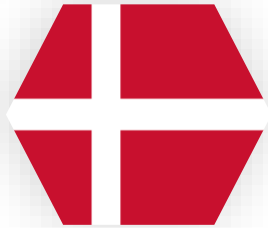
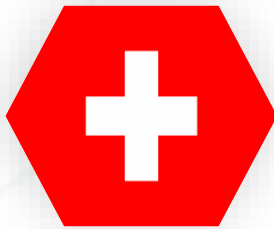
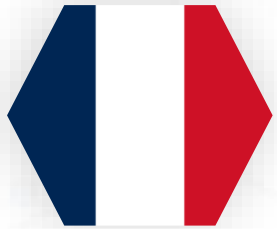
TOP 5 DUTCH PRIVATE EQUITY FINANCING ROUNDS | 2022

| Company | Sector | Type of Round | USD M |
|---------------------------------------|------------------------|---------------|-------|
| Leyden Laboratories B.V. | Biotech – Therapeutics | Series B | \$140 |
| Protix | Biotech – Other | Unknown | \$57 |
| TargED Biopharmaceuticals B.V. | Biotech - Therapeutics | Series A | \$44 |
| In Ovo B.V. | Biotech - Other | Series B | \$38 |
| Scenic Biotech BV | Biotech - Therapeutics | Series A | \$31 |

The table shows the five biggest private equity financing rounds (excl. IPOs, research grants, loans) of private and independent biotech companies in the Netherlands 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: NETHERLANDS AND OTHER EUROPEAN COUNTRIES

NETHERLANDS | FRANCE | GERMANY |
SWITZERLAND | UNITED KINGDOM | DENMARK



OVERVIEW OF LIFE SCIENCE COMPANIES

LIFE SCIENCE COMPANIES BY COUNTRY AND SECTOR

TOTAL



1931



2837



4157



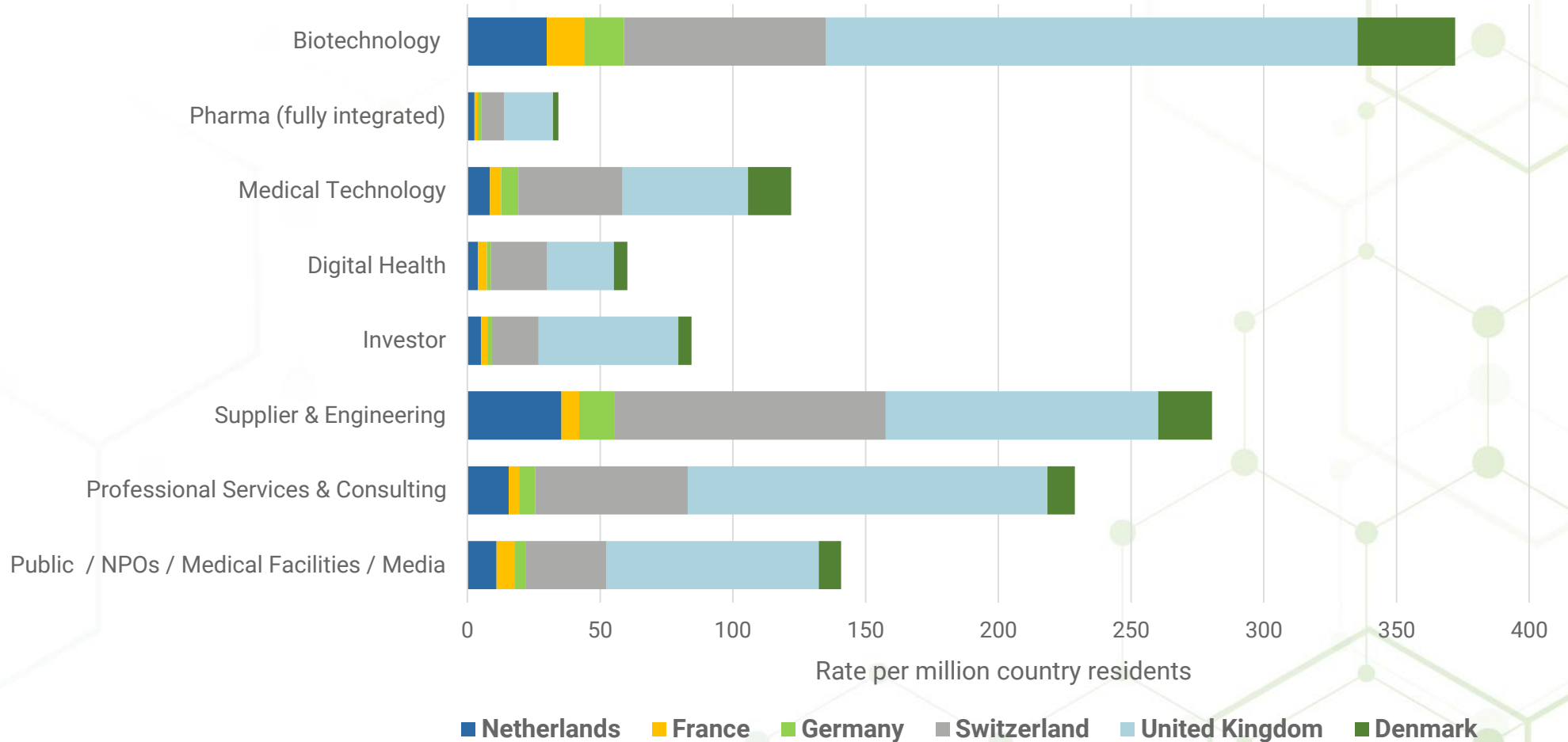
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4555



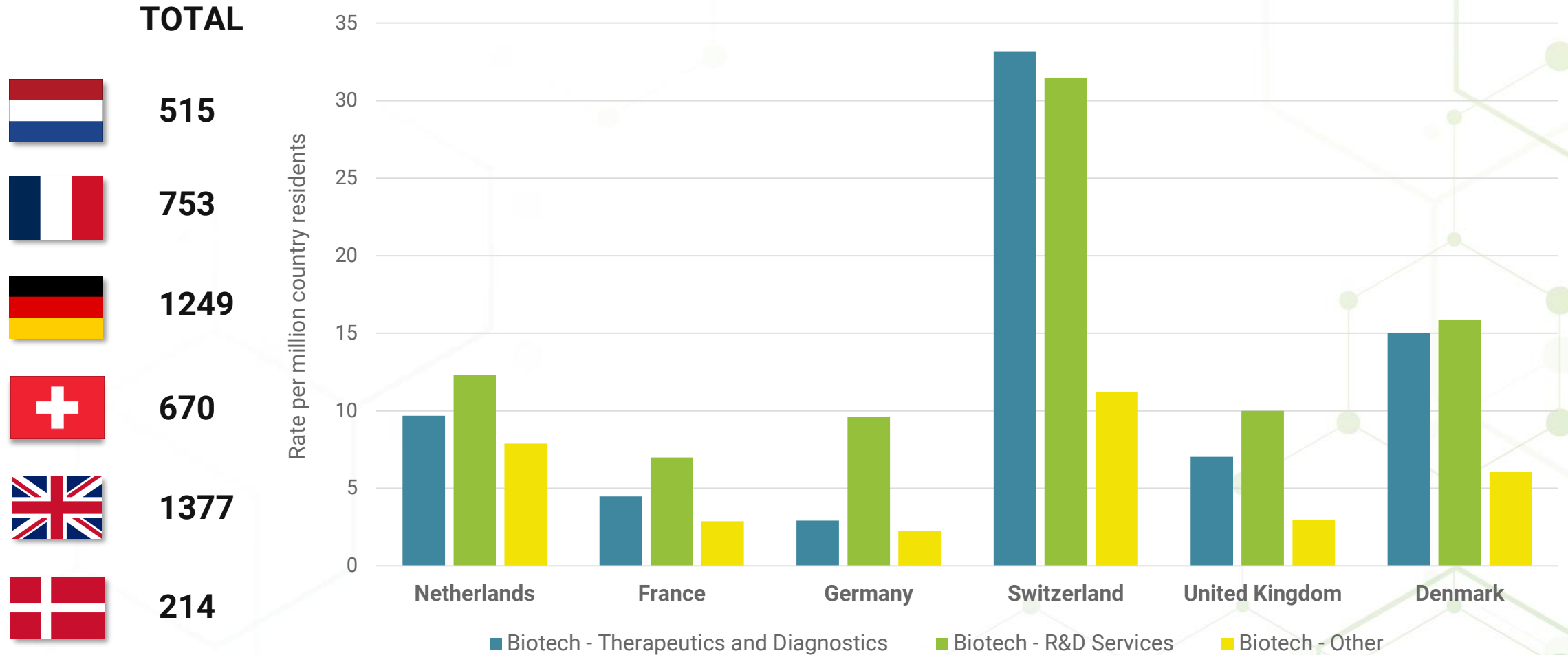
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For the definition of categories please visit www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html. For comparison, the graph shows the rate of companies by sector per million residents of each country. Biotechnology companies include 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

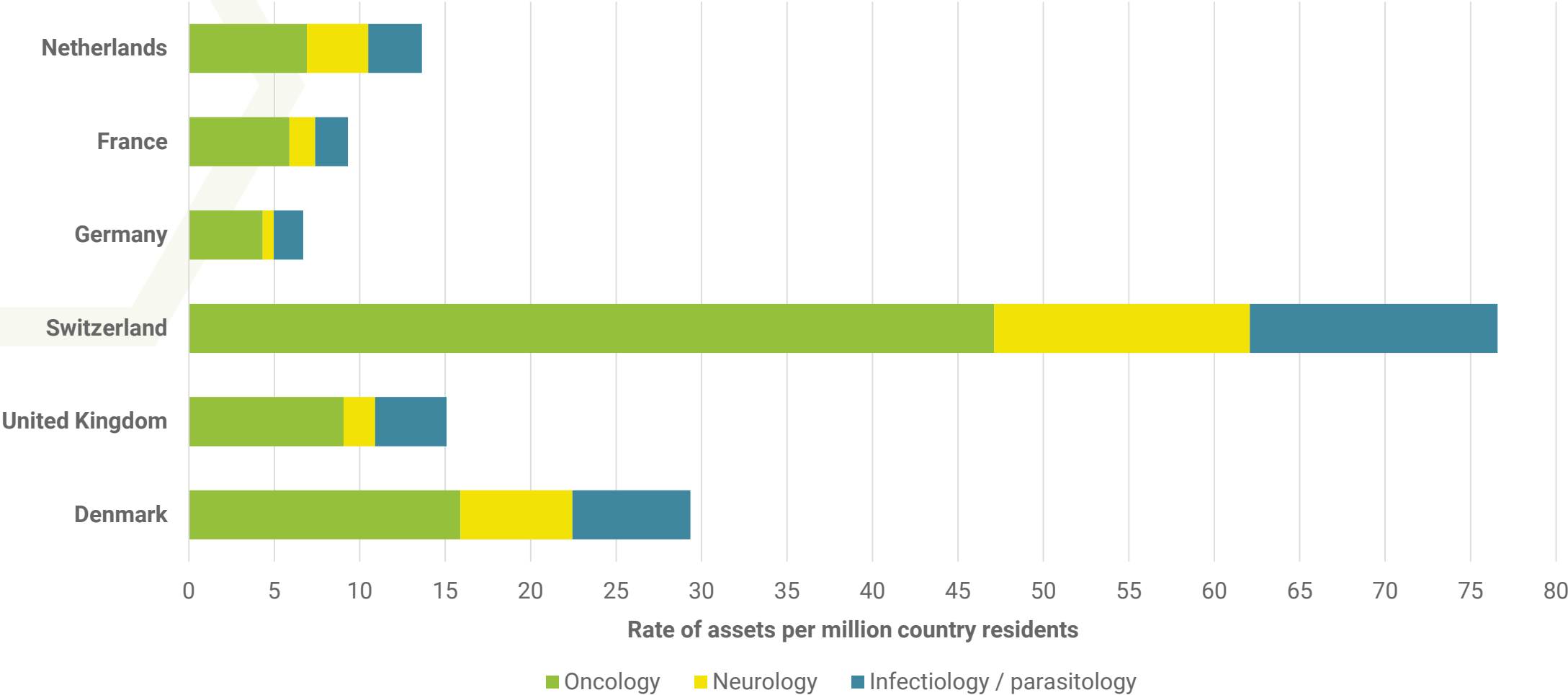
BIOTECH COMPANIES BY COUNTRY AND SECTOR



For the definition of categories please visit www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html. 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

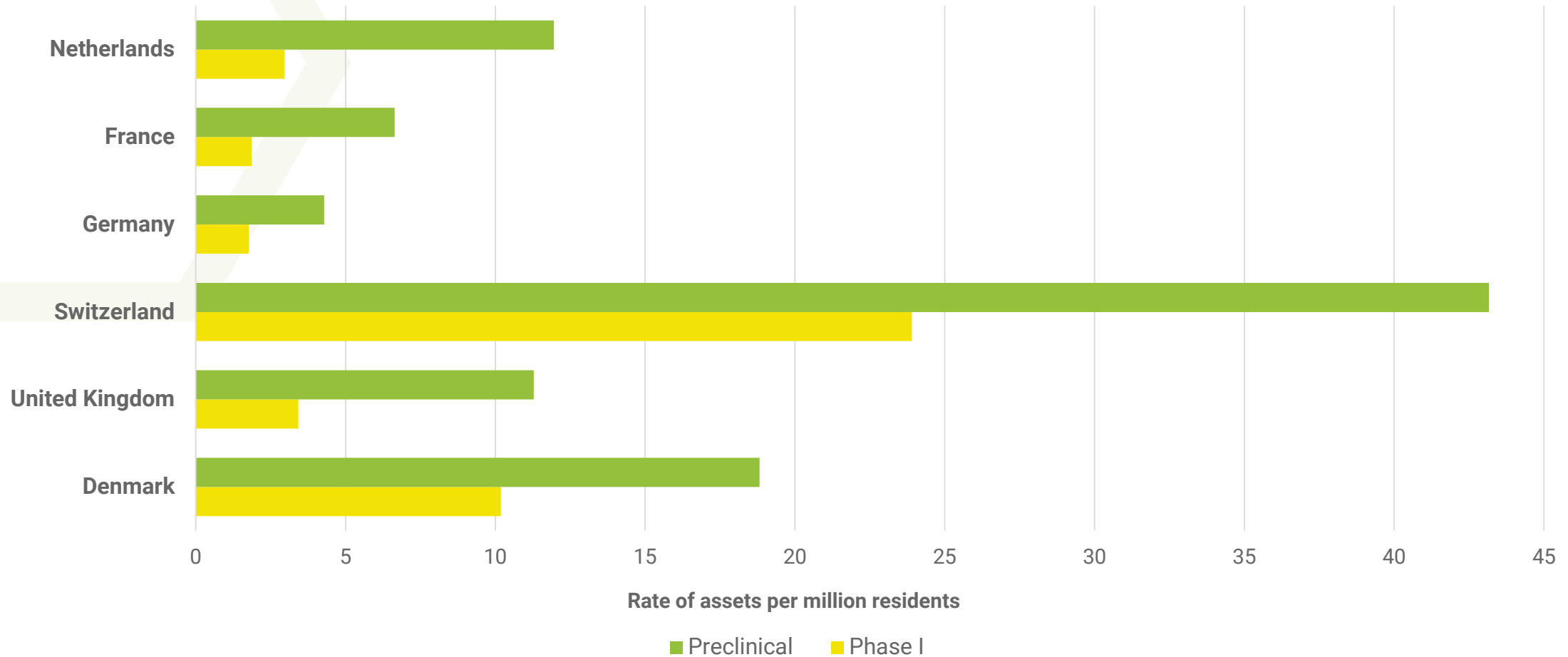
BREAKDOWN BY TOP THREE INDICATIONS OF NETHERLANDS



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). The top three indications of the Netherlands shown are Oncology, Infectiology/parasitology, and Neurology.

THERAPEUTICS BY DEVELOPMENT PHASE

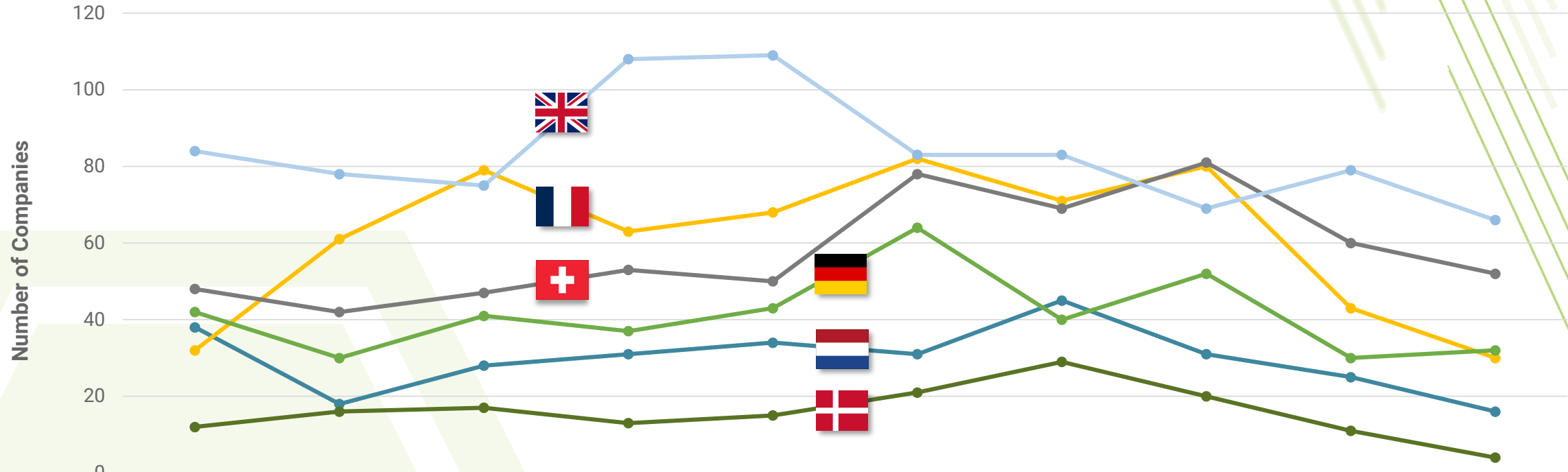
PRECLINICAL AND PHASE I



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

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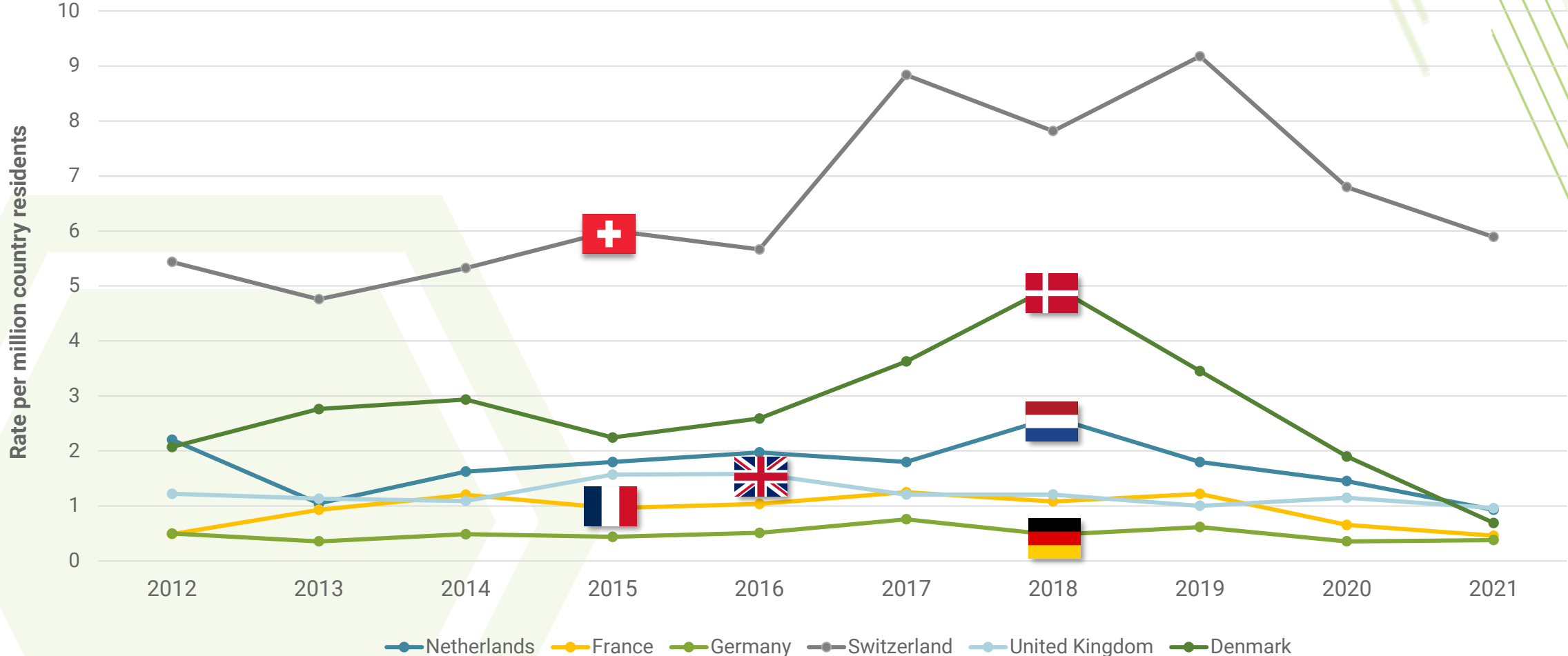


| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|----------------|------|------|------|------|------|------|------|------|------|------|
| Netherlands | 38 | 18 | 28 | 31 | 34 | 31 | 45 | 31 | 25 | 16 |
| France | 32 | 61 | 79 | 63 | 68 | 82 | 71 | 80 | 43 | 30 |
| Germany | 42 | 30 | 41 | 37 | 43 | 64 | 40 | 52 | 30 | 32 |
| Switzerland | 48 | 42 | 47 | 53 | 50 | 78 | 69 | 81 | 60 | 52 |
| United Kingdom | 84 | 78 | 75 | 108 | 109 | 83 | 83 | 69 | 79 | 66 |
| Denmark | 12 | 16 | 17 | 13 | 15 | 21 | 29 | 20 | 11 | 4 |

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

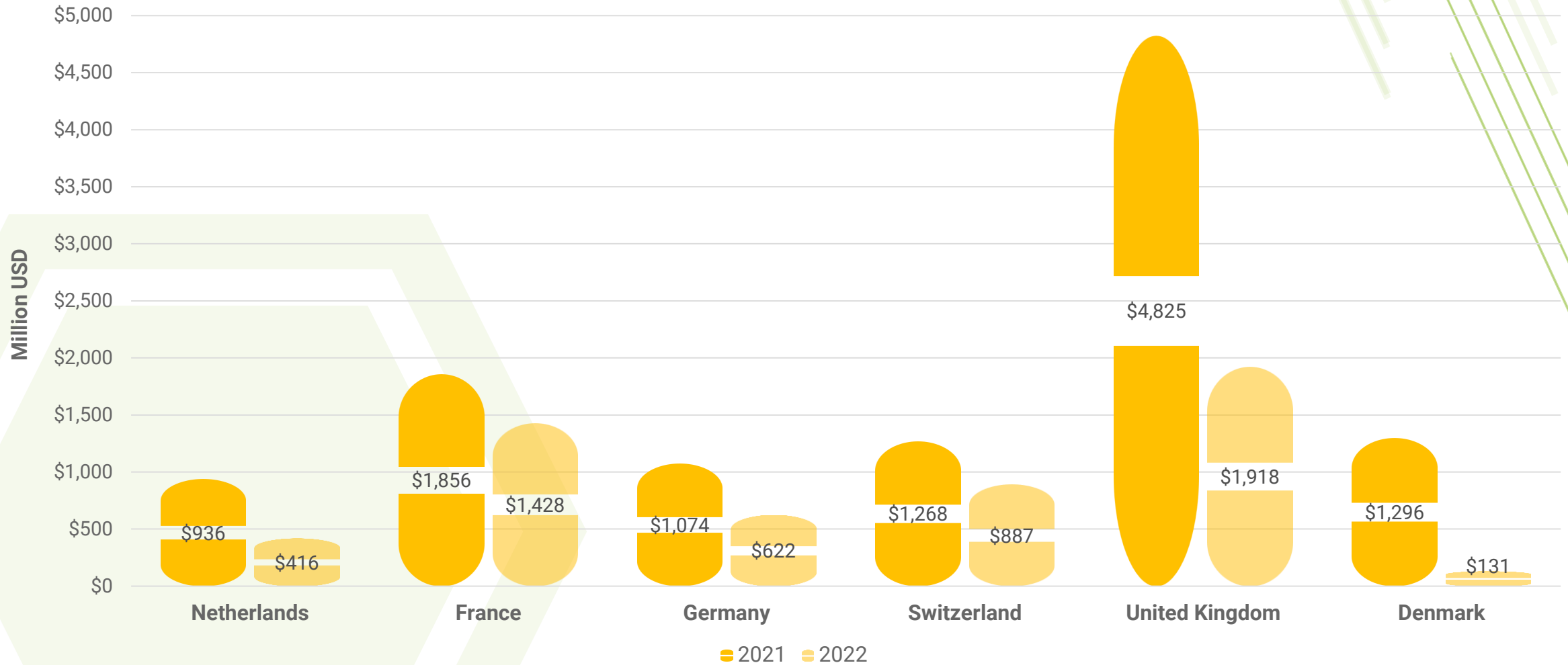
RATE OF LIFE SCIENCE COMPANIES FOUNDED BY YEAR PER MILLION RESIDENTS | 2012-2021



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

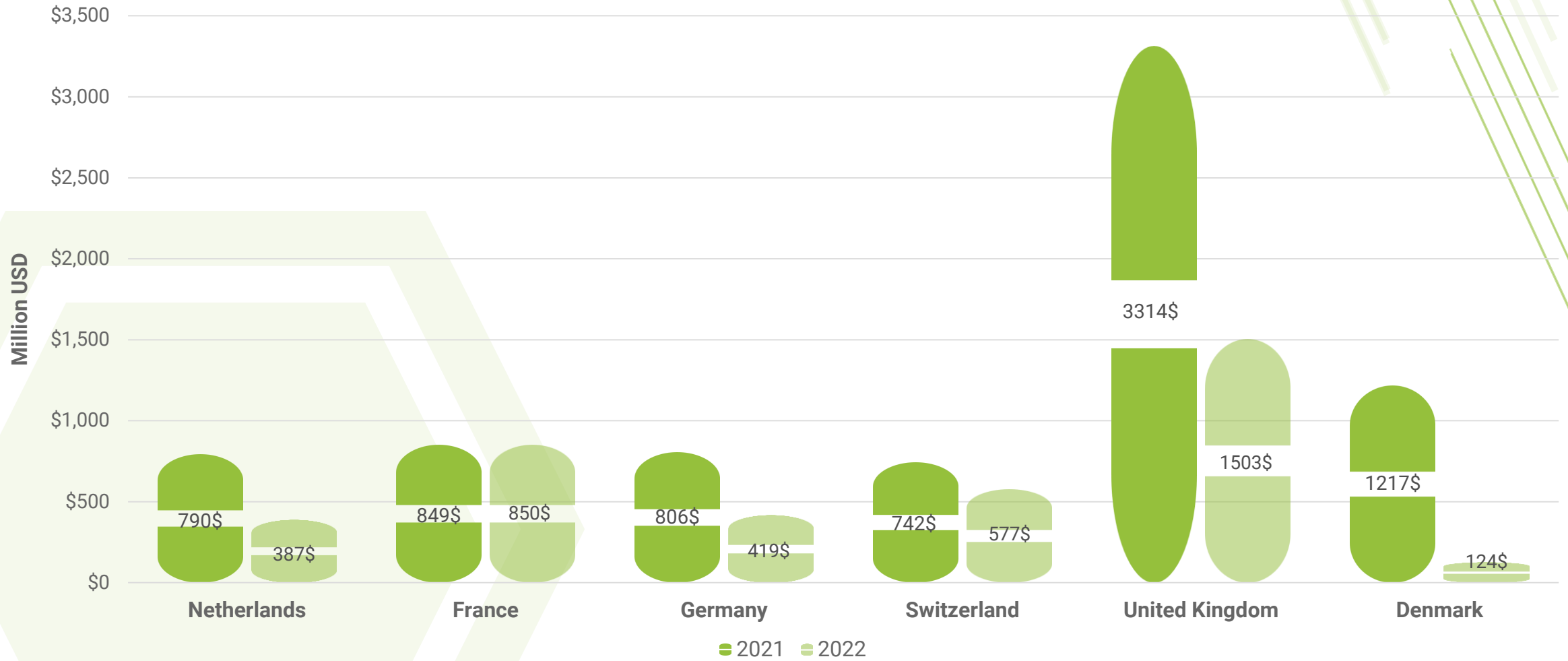
PRIVATE EQUITY ROUNDS OF LIFE SCIENCE COMPANIES | 2021-2022



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 |
|---------------------------------|------------------------|---------------|-------|--------------------|
| InnovaFeed | Biotech – Other | Series D | \$250 | France |
| DNA Script SAS | Biotech – R&D Services | Series C | \$200 | France |
| Leyden Laboratories B.V. | Biotech – Therapeutics | Series B | \$140 | Netherlands |
| ImCheck Therapeutics SAS | Biotech – Therapeutics | Series C | \$102 | France |
| OMass Therapeutics | Biotech – Therapeutics | Series B | \$100 | United Kingdom |
| Ori Biotech Ltd | Biotech – R&D Services | Series B | \$100 | United Kingdom |
| MiroBio Ltd. | Biotech – Therapeutics | Series B | \$97 | United Kingdom |
| Osler Diagnostics | Biotech – R&D Services | Series C | \$85 | United Kingdom |
| CDR-Life Inc. | Biotech – Therapeutics | Series A | \$76 | Switzerland |
| SparingVision | Biotech – Therapeutics | Series B | \$75 | France |

The table shows the biggest private equity financing rounds (excl. IPOs, research grants, loans) of private and independent 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.

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