

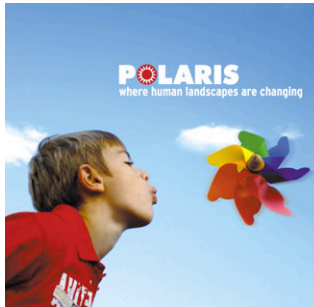


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The biotech sector in Italy: a growing and promising reality

Leonardo Vingiani

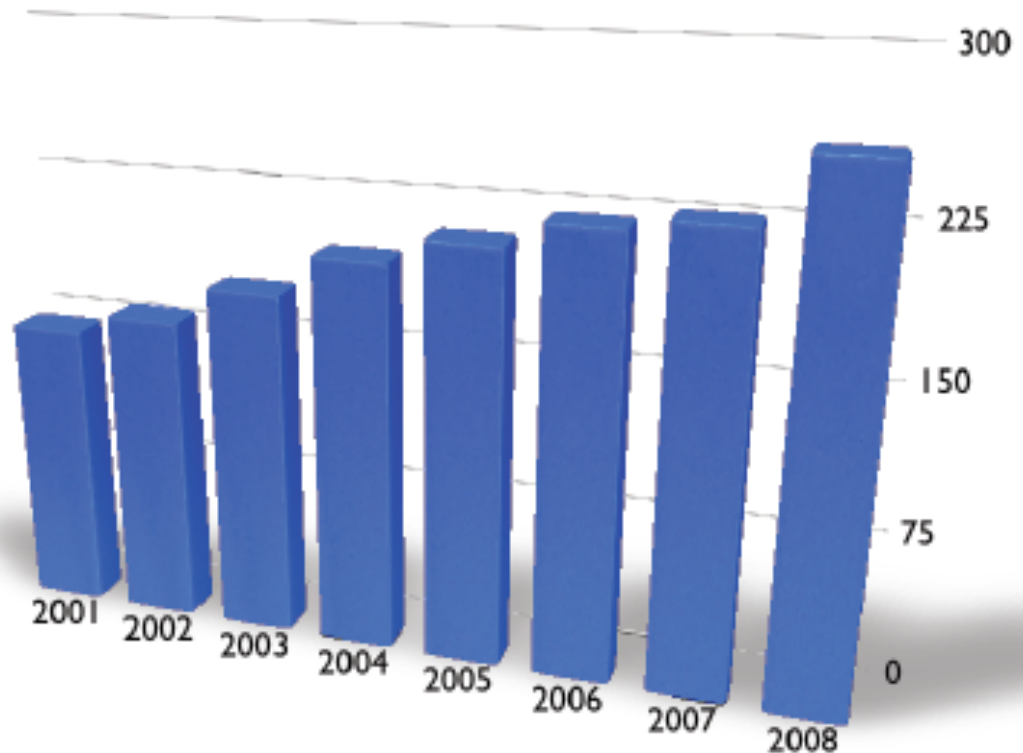


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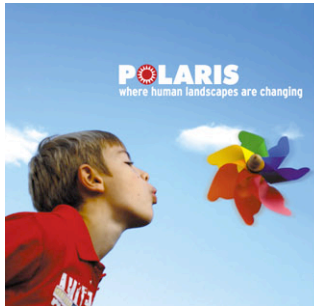
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Italian Biotech: a growing sector

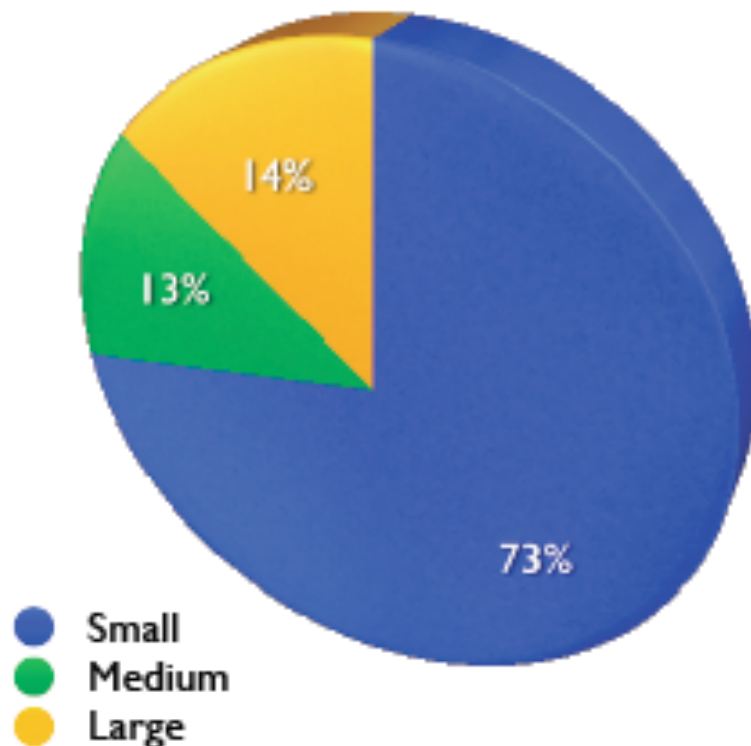
Enterprises	260
Employees	40.956
R&D employees	8.847
R&D investment	1.500 mln €
EBIT	+ 84%
Net Debt	+ 30%



Source Blossom & Company – Assobiotech Report, 2009



Breakdown of biotech companies by field



□ 190 (73%) are small enterprises

□ 147 (57%) start-up

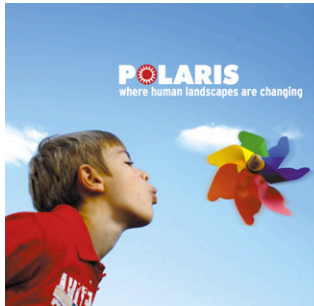
□ 37 (14%) spin-off accademici

□ 34 (13%) are medium-sized

□ 36 (14%) are large enterprises

□ 20 subsidiaries, or branches of multinationals

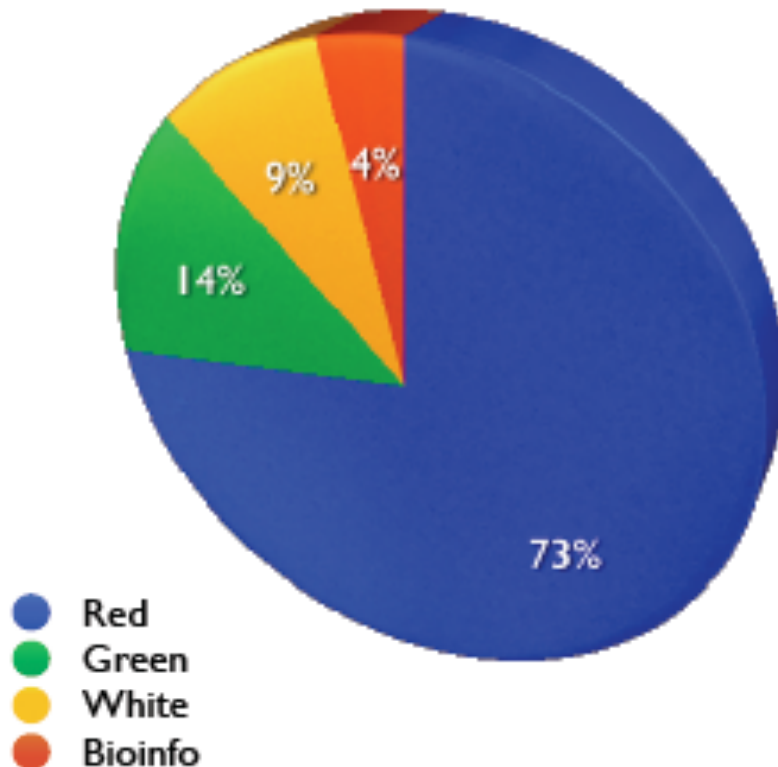
Source Blossom & Company – Assobiotec Report, 2009



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Breakdown of biotech companies by sector



- 190 (73%) health care - Red
- 36 (14%) agriculture, animal husbandry and veterinary - Green
- 23 (9%) industrial and environmental - White
- 11 (4%) bioinformatics - Bioinfo

Source Blossom & Company – Assobiotec Report, 2009



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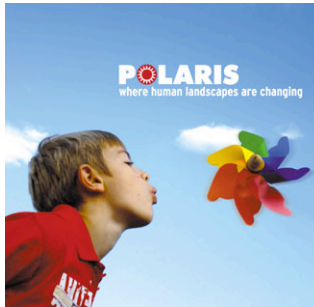
Biotech in Italy: R&D

There are 136 products under clinical development

Italian biotech research, furthermore, can boast 73 products and projects at a pre-clinical developmental phase and 49 projects at a discovery phase, which altogether constitute a promising foundation for the sector in the coming years.

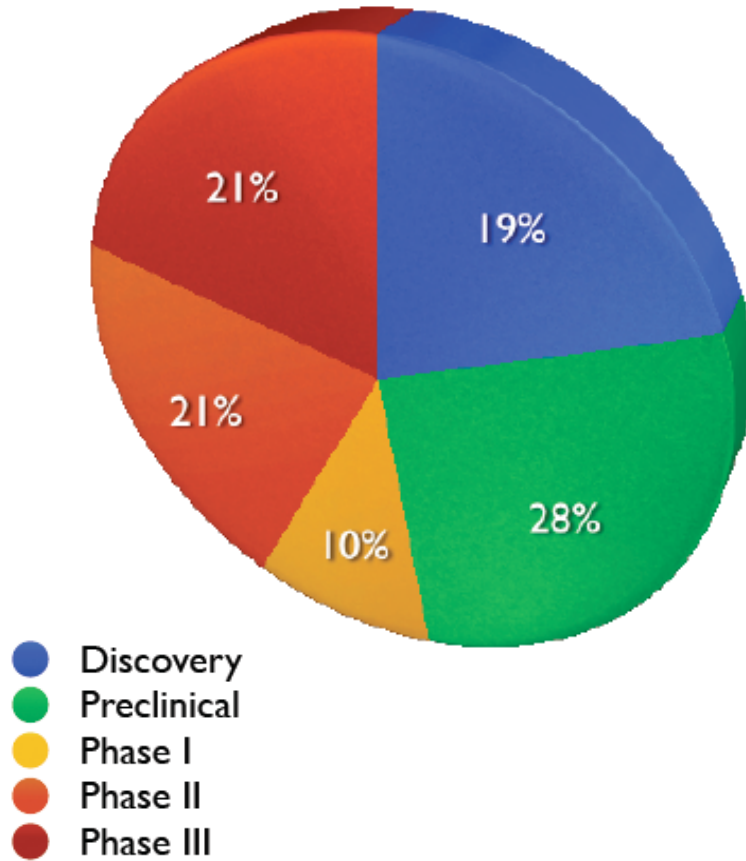
Of the 209 products under development, 40 have been given “orphan drug designation” (2 by FDA, 7 by EMEA and 31 by both EMEA and the FDA). These are mainly products for use in the field of oncology. The remaining products are for cardiovascular use.

Source Blossom & Company – Assobiotec Report, 2009

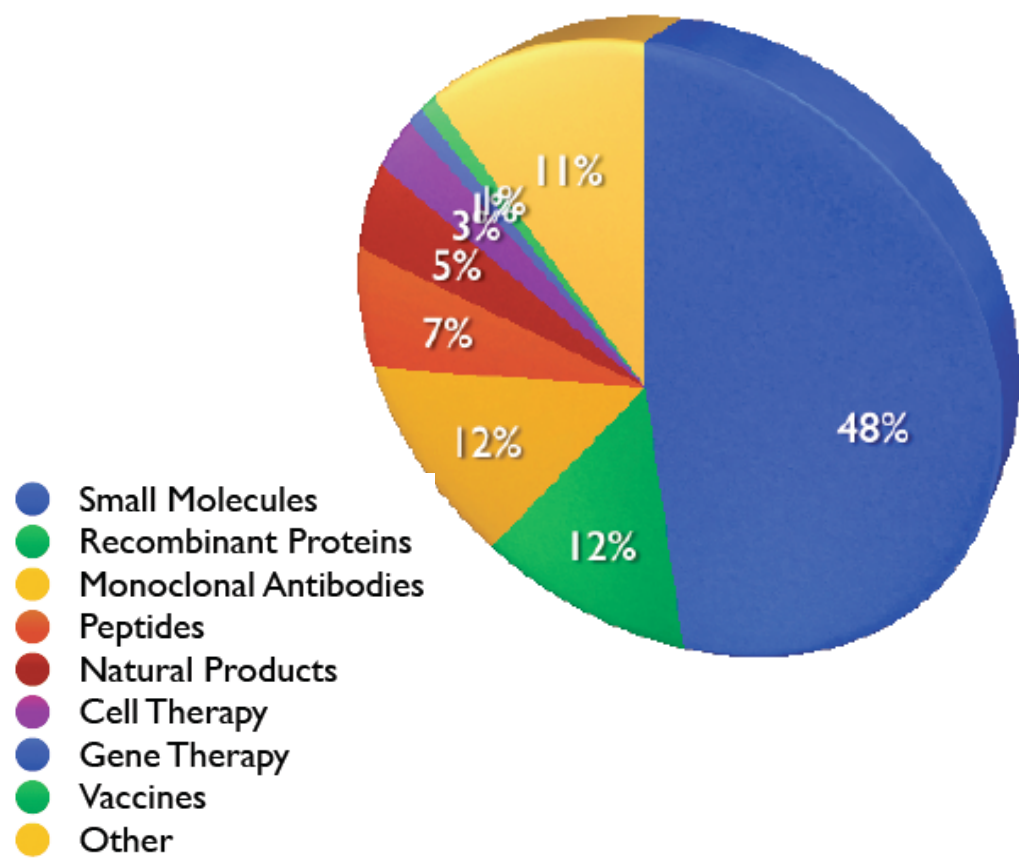


Breakdown analysis:

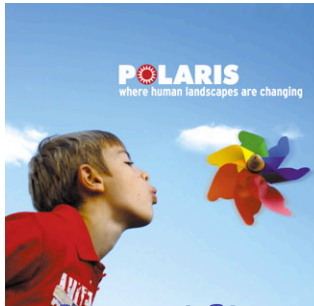
by phase



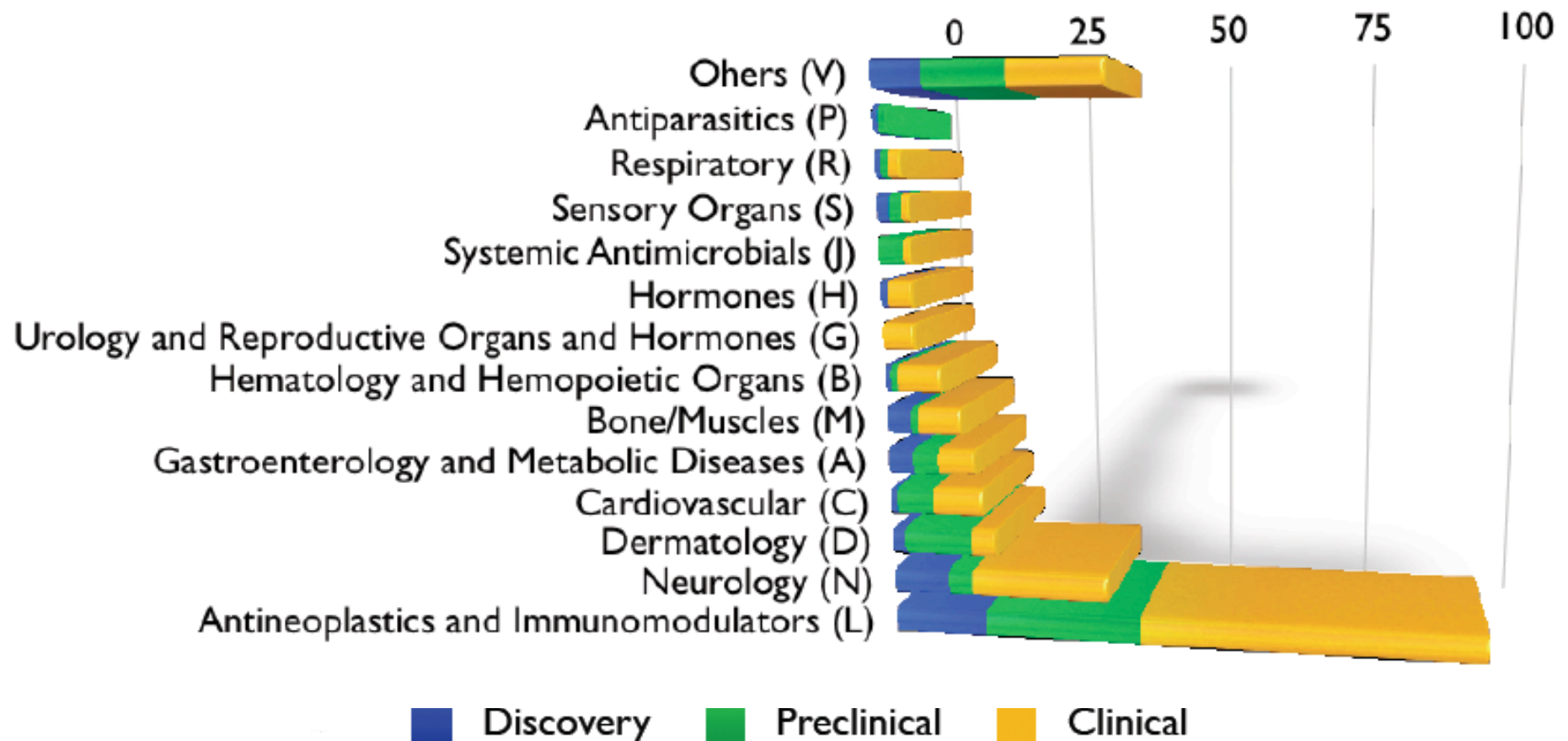
by technology

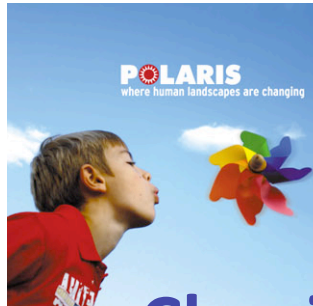


Source Blossom & Company – Assobiotec Report, 2009

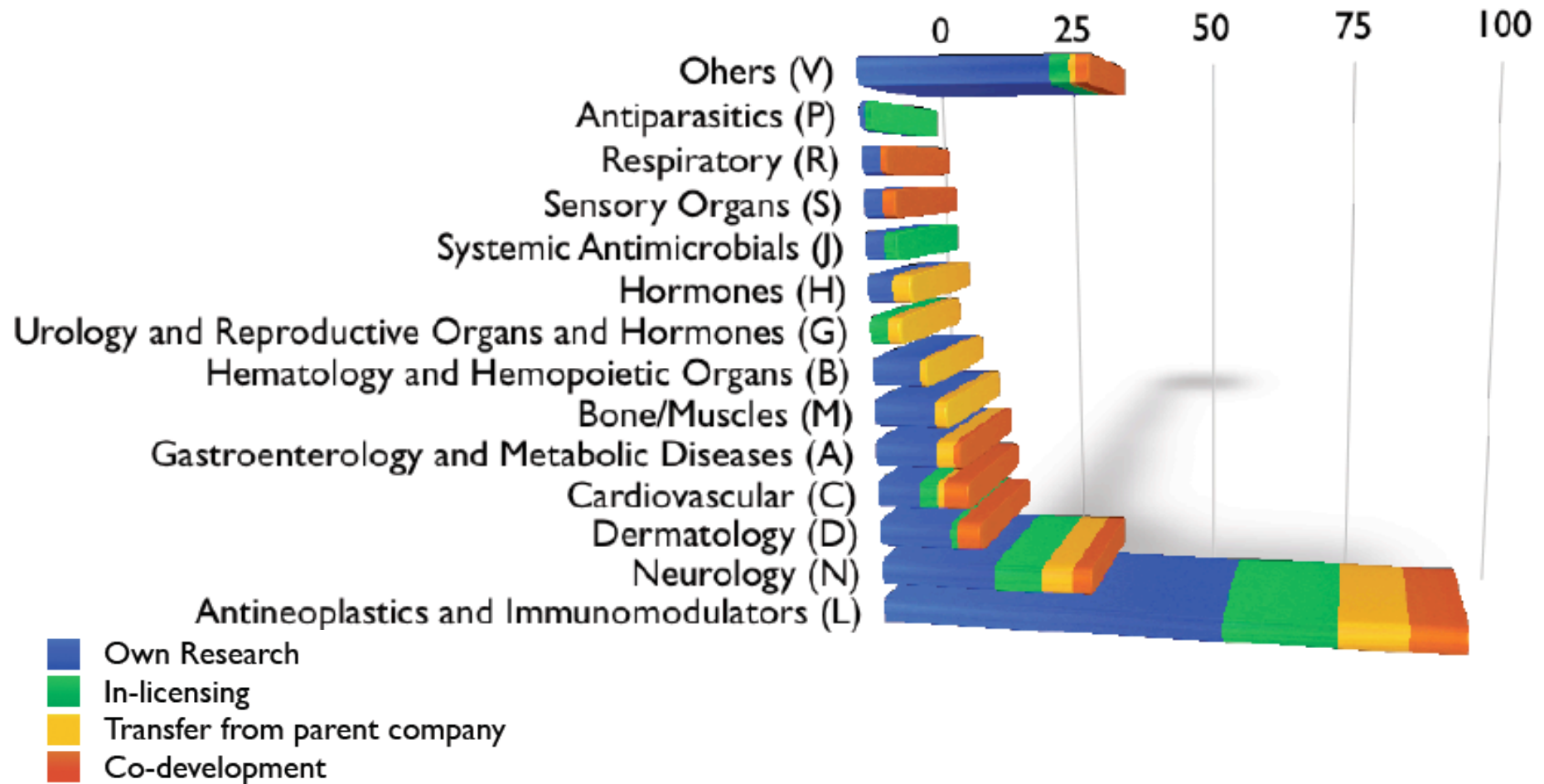


Classification by therapeutic area and development phase

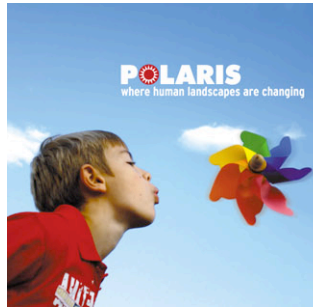




Classification by origin and therapeutic area



Source Blossom & Company – Assobiotech Report, 2009

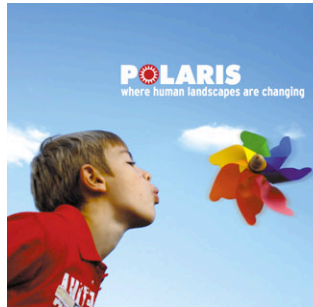


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Key Strengths of Italian Biotech

- The combination of high quality research together with low costs makes the Italian biotech system highly competitive
- Excellent scientific community with strong international interactions
- Excellent quality of research, with several dedicated centers



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Key Strengths of Italian Biotech

- Strong product pipeline: 136 products under clinical development
- In the last few years the development rate of the Italian biotech industry has begun to accelerate dramatically
- It was registered a constant growth in terms of number of companies, revenue and turnover, but overall in quality of R&D, as widely proved by the strong Italian pipeline



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Collaboration opportunities

- Italy needs to improve the technology transfer culture among universities, public agencies and companies
- Italy lacks specialized VCs and seed capital in the biotechnology field



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Thanks for your attention

For more information:

Assobiotec, Italian Association for the Development of Biotechnology

Via Giovanni da Procida 11, 20149 Milan - Italy

Ph. +39 02 34565306; Fax +39 02 34565284

E-mail assobiotec@federchimica.it

www.assobiotec.it