

Biotech on the rise: Diabetes

The most extensive investigation of the European biotech industry to date has identified diabetes as the indication with the highest number of ongoing research projects among pharma- and biotech companies. Sweden and Denmark have been identified as the biotech hotspots with highest productivity.

In the wake of what is most likely the largest and most detailed study of the European biotech industry to date the team of Novumed Life Science Consulting has identified diabetes research as the field with the highest number of research projects across Europe. From a total of 2552 European R&D projects (clinical phases I-III) conducted by small and mid-sized biotechs (up to 600 employees) a total of 64 focus on diabetes. This result is underlined by the portfolios of the world's biggest pharma companies. In an earlier study, Novumed investigated the global pharma market in the year 2012 and identified the 200 biggest blockbuster drugs. Of the top 200 drugs of the year 2012 a total of 11 drugs focus on the

treatment of diabetes, achieving total revenues of 21 billion US \$.

For this study, the Novumed team consisted of 7 team members who investigated more than 4600 European biotech firms across 30 European countries (including Iceland, Slovakia, etc.)

Diabetes research about to become the most important area of research for European pharma- and biotech companies

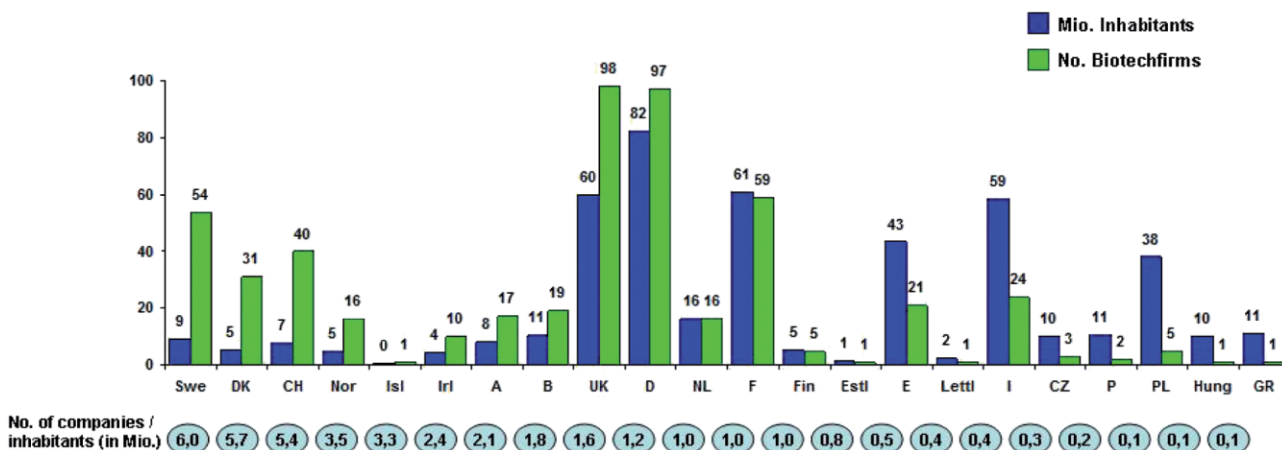
1773 of these firms fell into the healthcare category (including services, diagnostics etc.) and only a total of 522 focused on the development of new drugs. An in-depth investigation of the 2552 R&D projects associated with these firms, revealed several interesting facts about the status quo of the European biotech industry.

Sweden, Denmark, Norway and Switzerland, for example, display a distinct strength in cultivating a productive R&D environment. In particular, when viewed in the context of their total number of inhabitants. In Sweden, a total of 54 biotech firms were

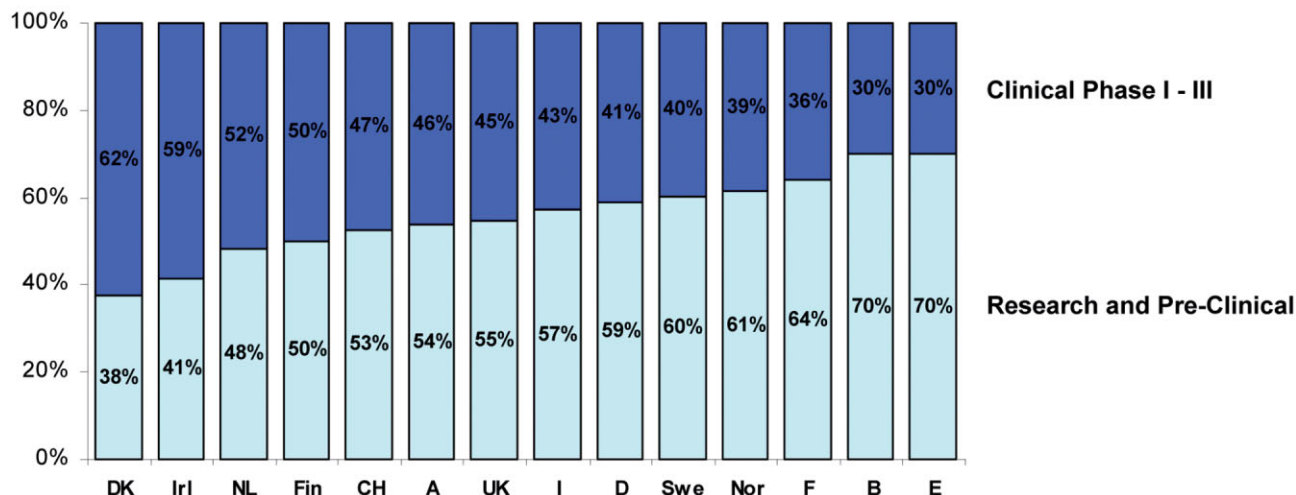
identified, all of which have at least one compound in pre-clinical or clinical development. When seen in context with Sweden's approximately 9 million inhabitants these numbers are indicative of extraordinary productivity. In Denmark, which is approximately half the size of (~ 5,4, million inhabitants) a total of 31 biotech firms with drug development focus were identified.

In stark contrast to these countries, Germany displays only average productivity when compared with other European countries. The biggest European country can boast a total of 97 biotech firms with therapeutic R&D focus, topped only by the UK with 98 biotechs with therapeutic R&D focus. Given Germany's 82,4 million inhabitants its R&D productivity is at best average.

With regard to the maturity of the respective company pipelines, Germany and the UK are again only average. Smaller countries like Ireland (~ approximately 4,2 million inhabitants) and Denmark (~5,4 million inhabitants) have been identified as the



Number of biotechs developing new drugs (clinical and pre-clinical phases of development) and number of inhabitants per country in mio. Source: Novumed Analysis)



Countries ranked according to maturity of their R&D pipeline. (Source: Novumed Analysis)

biotech regions with the highest number of compounds in clinical development. In both countries, the proportion of compounds in clinical development approximates 60%. The residual 40% of compounds are distributed across the early-development stages, pre-clinical and research.

If the attention is shifted from individual indications to entire therapy areas, oncology is with a total of 516 compounds under development the research field with the highest level of research activity in Europe. Oncology is followed by infectious disease (262 compounds under development),

neurological/psychiatric disease (219 compounds under development), inflammatory disease (199 compounds under development), metabolic disease (128 compounds under development) and cardiovascular disease (104 compounds under development).

About Novumed Life Science Consulting



Novumed is an independent top strategy boutique with clear focus on the life sciences industry.

The company's experienced consultants support the management of pharma, biotech-, medtech- and diagnostics firms in the development of market-, growth-, portfolio- and innovation strategies and support them in their M&A activities.

By Dr. Jörn Leewe, Novumed GmbH
 Tel: +49-89-944-690-10
 E-mail: info@novumed.com

➤ <http://www.novumed.com>

Send your contribution to the BTJ FORUM



Here, we pay special attention to scientific but also public, legal, ethical and cultural aspects of biotechnological research. To this end, you can send press-releases of publications in journals and books, prizes, start-up companies, patents, new products or tools. Your contribution to this magazine part may be a short column (about 100–150 words) up to a longer

report (maximum 2000 words), with a picture, covering one of the topics in the index.

Submit online at <http://mc.manuscriptcentral.com/btj/> ("other contribution") or email to biotechnology-journal@wiley-vch.de

Press releases: Email or fax to +49-6201-606 525

Forum

News and views
 News & views
 Journal club

News from industry
 New on the market
 Biotech startups
 Industrial prize
 Biotech industry highlights
 Facts and figures
 Patents
 Biotechnology round the world

News from academia
 Public-private partnerships
 Networks and institutes
 Academic awards
 Teaching biotechnology
 Regulatory issues and directives
 Biotechnology in our society

Meeting report