



# ANNUAL MEETING

MEDICON VALLEY ALLIANCE

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CEO

Medicon Valley Alliance



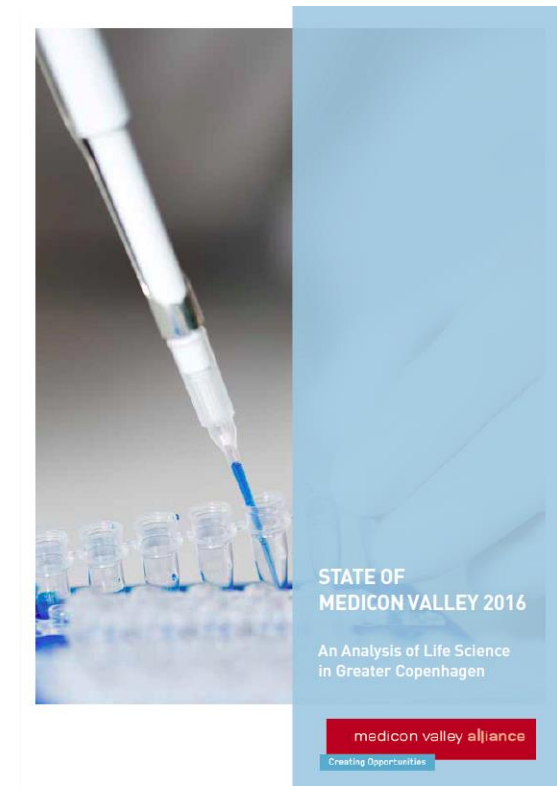
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# THE STATE OF MEDICON VALLEY 2016

## STATE OF MEDICON VALLEY

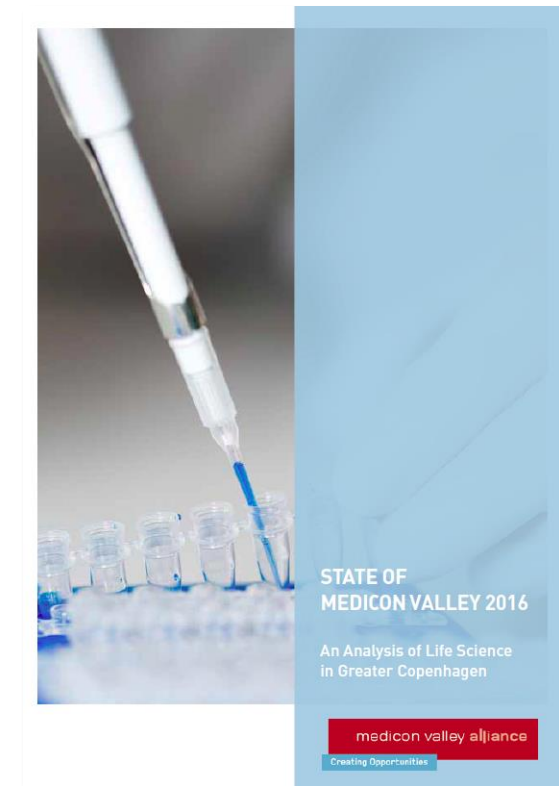
An analysis of Life Science in  
Greater Copenhagen



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# THE STATE OF MEDICON VALLEY 2016

The aim of is to **highlight** central **trends, challenges** and **potentials** in order provide us with a common point of departure for a discussion of the **future** of **Medicon Valley**

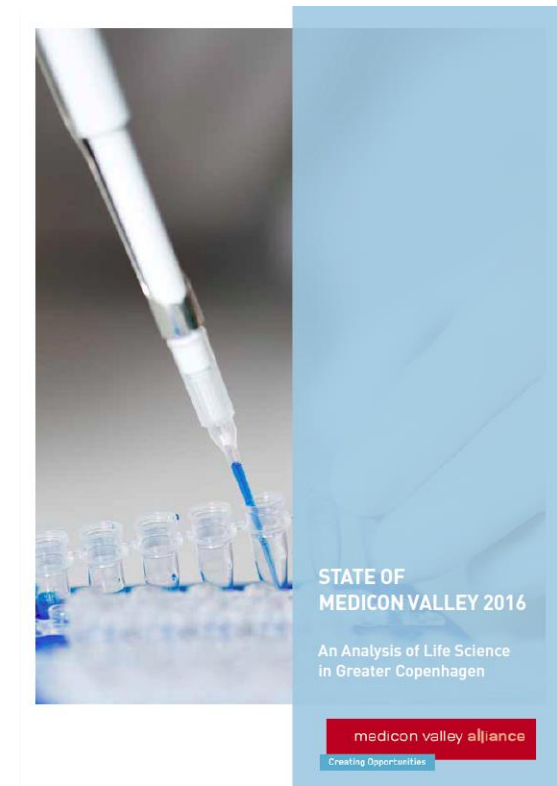


# THE STATE OF MEDICON VALLEY 2016

A change in Danish and Swedish life science and a new period of **transition** is here

Medicon Valley is now the **leading** life science cluster in **Scandinavia**

Important **success** factors: **Beacons** in Medicon Valley

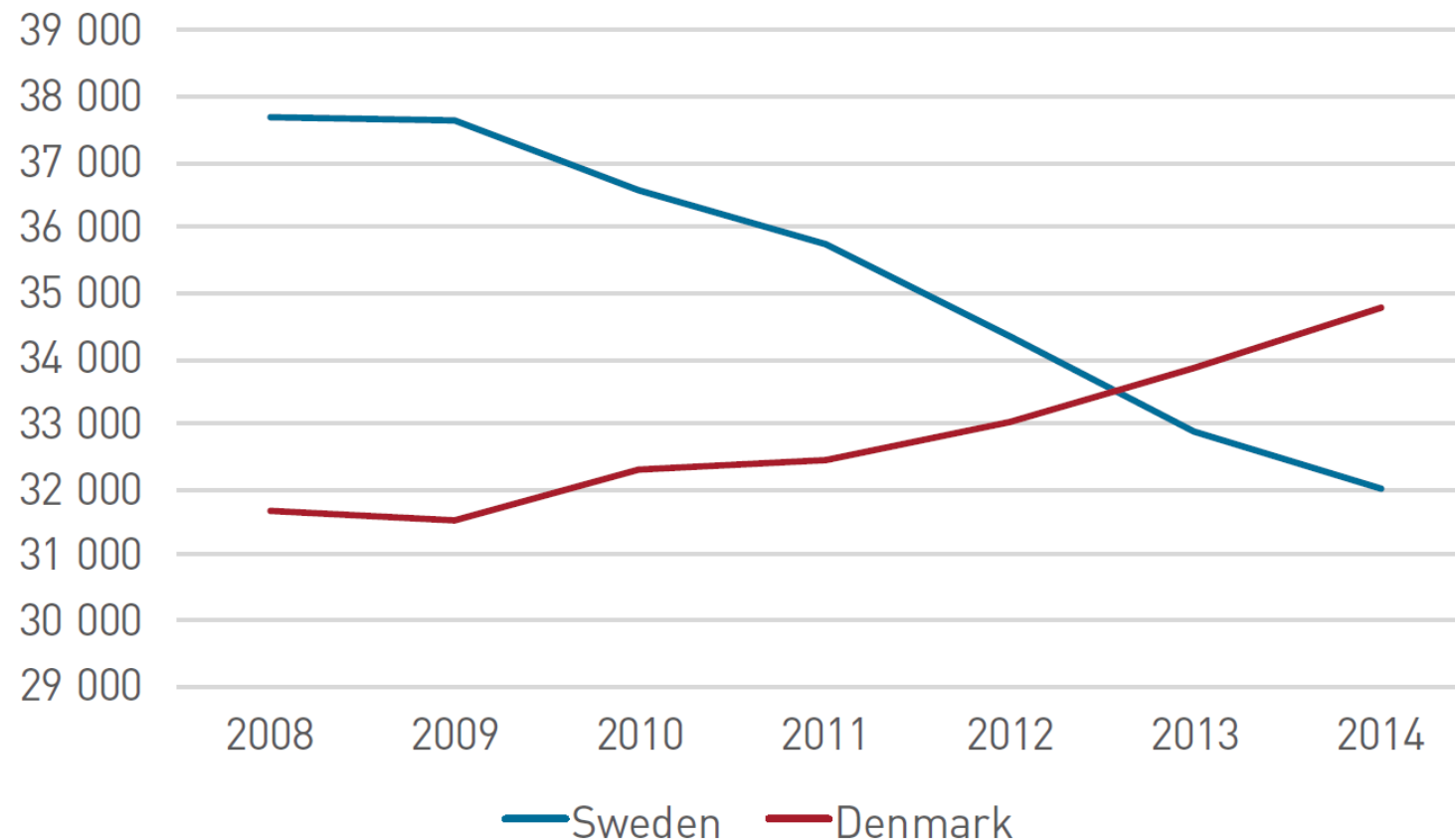


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*“A change in Danish and Swedish life science and a new period of transition is here”*

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Life science employment in Sweden and Denmark  
2008-2014



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## A new period of **transition**

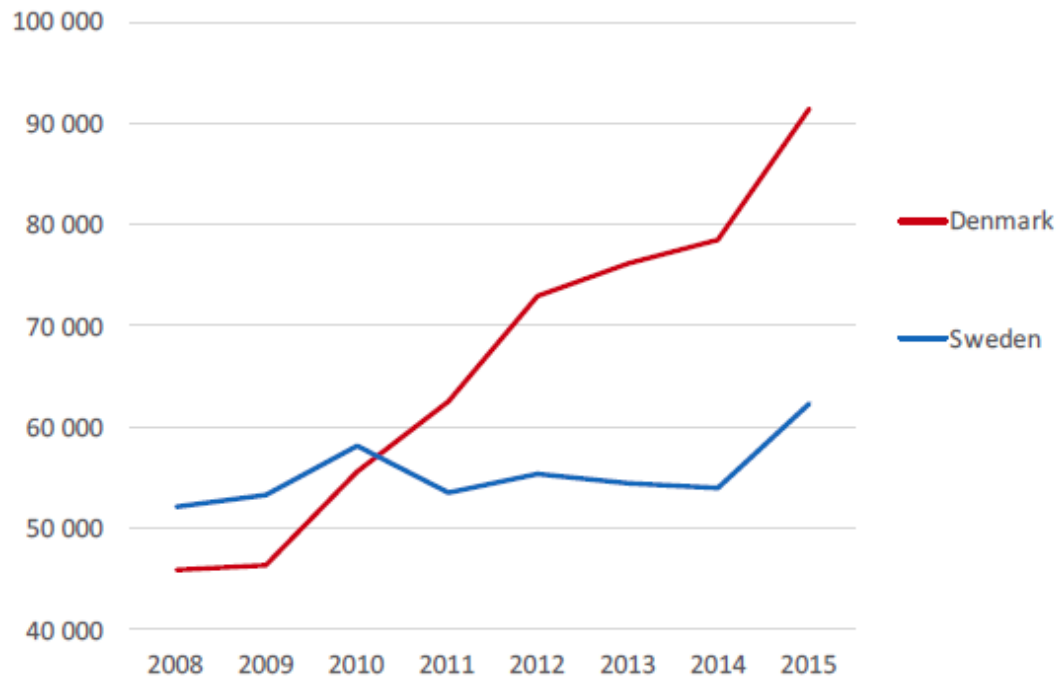
- There are signs of **change** for the better in Lund, Södertälje, Stockholm and Uppsala
- New biotech companies are emerging after the financial crisis
- New **investments** in the R&D of **biological medicine** creates substantial opportunities for both Swedish and Danish life science
- A powerful **rebalancing** between Sweden and Denmark within **natural science** lies ahead with the investments in the new materials research facilities



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## DANISH LIFE SCIENCE EXPORT DOUBLED IN SEVEN YEARS

Value of exports of medical and pharmaceutical products and medical instruments, apparatuses etc in millions (DKK)



### 10.4%

annual growth in Danish life science exports. This corresponds to a doubling in seven years. In the same period, Swedish life science exports have risen by 2.6 % annually.

*Denmark is the **fourth** largest exporter of life science products per capita, while **Sweden** is the **tenth** largest*



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## THE PRINCIPAL EXPORT MARKETS FOR DANISH LIFE SCIENCE

	Exports in millions (DKK) 2015	Annual growth 08-15
USA	26 032	20%
Germany	7 587	9%
China	6 971	30%
Sweden	4 557	2%
Japan	3 677	5%
Great Britain	3 484	8%
France and Monaco	2 866	-1%
Norway	2 236	11%
Italy	2 235	6%
Finland	2 170	6%

## THE PRINCIPAL EXPORT MARKETS FOR SWEDISH LIFE SCIENCE

	Exports in millions (DKK) 2015	Annual growth 08-15
USA	10 032	3%
Germany	9 911	7%
China	5 657	33%
Great Britain and Northern Ireland	3 735	5%
Norway	3 155	1%
France	3 025	-7%
Japan	2 795	22%
Australia	2 119	-1%
Finland	2 046	-1%
Denmark	1 712	-3%

*”The small companies say that penetrating the American market takes too great an effort”*

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*“Medicon Valley has grown to be  
the leading life science cluster in  
Scandinavia”*

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**35 700**

Number of employees at  
Life science companies in  
Medicon Valley

**53%** of the total  
number of employees in  
the life science industry in  
Denmark and Sweden are  
based in Medicon Valley



**4%**

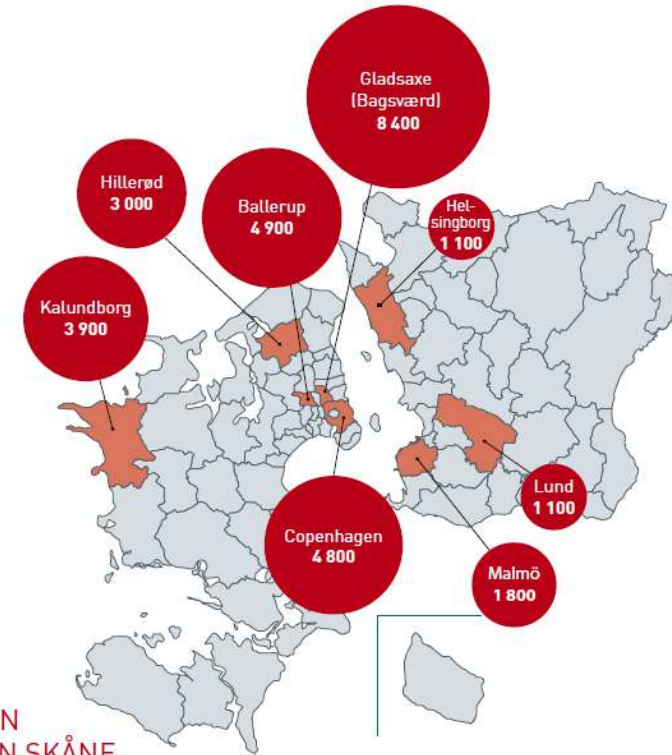
The number of employees  
In Medicon Valley has  
increased by 4% since 2008

**124 500**

Number of employees in  
the health care sector

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EMPLOYMENT DISTRIBUTED BY REGION IN DENMARK AND SWEDEN



EMPLOYMENT IN LIFE SCIENCE IN SKÅNE AND ZEALAND BY MUNICIPALITY

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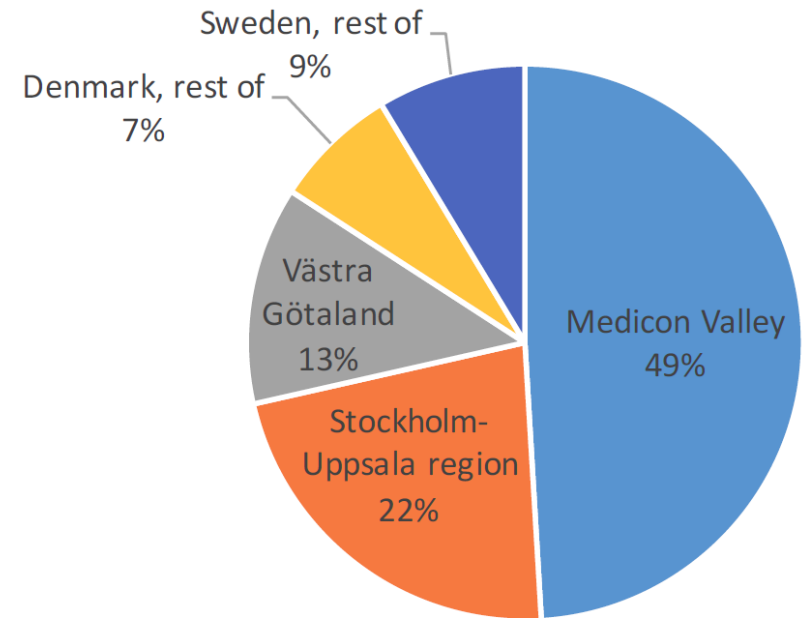
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# 2x

Medicon Valley is on top in Denmark and Sweden, submitting the greatest number of patent applications to EPO and with more than two times as many patent applications than Stockholm-Uppsala region

## PUBLISHED LIFE SCIENCE PATENT APPLICATIONS TO EPO, 2015



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*"The beacons of Medicon Valley"*

# THE STATE OF MEDICON VALLEY 2016

Many successful years for the industry has contributed to Medicon Valley's position as the leading Nordic life science cluster

**4 Pharmaceutical companies** with headquarters in Greater Copenhagen dominate Medicon Valley's life science industry



Photo: News Øresund



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# THE STATE OF MEDICON VALLEY 2016

Many successful years for the industry has contributed to Medicon Valley's position as the leading Nordic life science cluster

The region has successful **medical technology** companies such as Danish Coloplast and Nolato Medical from Skåne

Lately, biotechnology companies have emerged, such as **Genmab**, **Zeeland Pharma**, and **Symphogen** in Denmark and **Alligator Bioscience** and **Camurus** in Skåne.





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Photo: News Øresund

## 6 Science parks

With a major life science focus in Medicon Valley

**500** Life science companies with **4000** employees



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# THE STATE OF MEDICON VALLEY 2016

Greater Copenhagen is home to leading universities with a wide academic spectrum within life science

## 9 universities

There are a total of 9 universities and learning institutions in Medicon Valley that perform life science research

Excellent research in **Diabetes** and **neuroscience**. **Cancer, reproduction, structural biology, bioengineering** and **biological surfaces** are also some examples of strong research areas in Medicon Valley.



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## QS WORLD UNIVERSITY RANKINGS 2016

68 University of Copenhagen

78 Lund University

97 KTH

98 Uppsala University

109 DTU

117 Aarhus University\*\*

139 Chalmers

196 Stockholm University

264 University of Gothenburg

282 Linköping University



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# THE STATE OF MEDICON VALLEY 2016

New research facilities boost pharmaceutical research



## 22 Billion SEK

Is invested in Medicon Valley's latest beacon, comprised of the material research facilities MAX IV and European Spallation Source

**Life science** is expected to be one of the **vital research areas** in both research facilities



Photo: News Øresund



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*“Coming together is a **beginning**;  
keeping together is **progress**;  
working together is **success**”*

Henry Ford