

Annual Meeting 2019

Ambitions and Visions

- Regional life science and healthcare in a globalized world

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Creating Opportunities



AMBITIONS AND VISIONS

REGIONAL LIFE SCIENCE AND HEALTHCARE IN A GLOBALIZED WORLD

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MEDICON VALLEY

The leading life science cluster of the Nordics

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SPEAKERS



Jenni Nordborg
National Coordinator and Director of
the Office for Life Sciences
The Government Offices of Sweden



Line Norbæk
Deputy Permanent Secretary
Danish Ministry of Industry, Business
and Financial Affairs



Bertrand Pedersen
Manager at PwC
PwC Luxembourg



Salvatore Santoro
Managing Director/Head of
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DNB Markets



Stephan Christgau
Former Senior Partner in Novo
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Novo Seeds



Henriette Richter
Managing Partner
Sofinnova Partners



Magnus Corfitzen
CEO
Ascelia Pharma



Jan van de Winkel
CEO
Genmab A/S



Henriette Dræbye Rosenquist
President
Pfizer France



Katherine Richardson
Professor of Biological Oceanography
and Leader of Sustainability Science
Centre
University of Copenhagen



Søren Bregenholt
Chairman of the board
Medicon Valley Alliance
CEO, Macrophage Pharma



Petter Hartman
CEO
Medicon Valley Alliance



Morten Sommer
Professor/Entrepreneur
Technical University of Denmark



Annual Meeting
2019

State of Medicon Valley – Life science in Greater Copenhagen

Petter Hartman
CEO
Medicon Valley Alliance

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STATE OF MEDICON VALLEY

An analysis of life science in Greater Copenhagen

State of Medicon Valley 2019 is a collaboration between Medicon Valley Alliance and Øresundsinstituttet (ØI)

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 2019 report can be downloaded free of charge at www.mva.org



RESTRUCTURING AND GROWTH

It is going well for Swedish and Danish life science, but global challenges push for transformation

- A need to adapt to the ever-rising costs of development and increased pricing pressure
- A need to adapt to a sustainable development business model
- A need to handle escalating costs in the public healthcare system as we get older and sicker
- A need to adapt to a new wave of technological innovation powered by advances in AI and machine learning



STRONGER INNOVATION AND SUPPORT SYSTEM

New strategies and initiatives to strengthen Swedish and Danish life science

- National life science offices are up and running and new strategies have been launched to position Sweden and Denmark as leading life science nations
- The region's science parks are expanding with new buildings and an increasing number of companies and employees
- Major investments are being made in the two materials research facilities, MAX IV and European Spallation Source



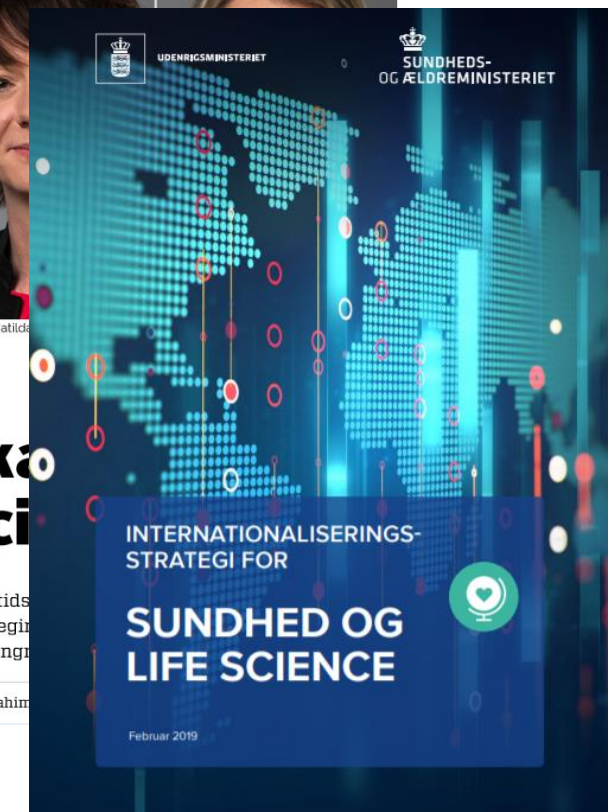
Näringsminister Ibrahim Baylan (S), forskningsminister Matilda Kristian Pohl/Regeringskansliet

DEBATT | VETENSKAP | E-HÄLSA

"Sverige ska inom life sci

Life science-samordnaren får ett heltids att prioriteras i den kommande strategin Matilda Ernkran (S) och Lena Hallengren

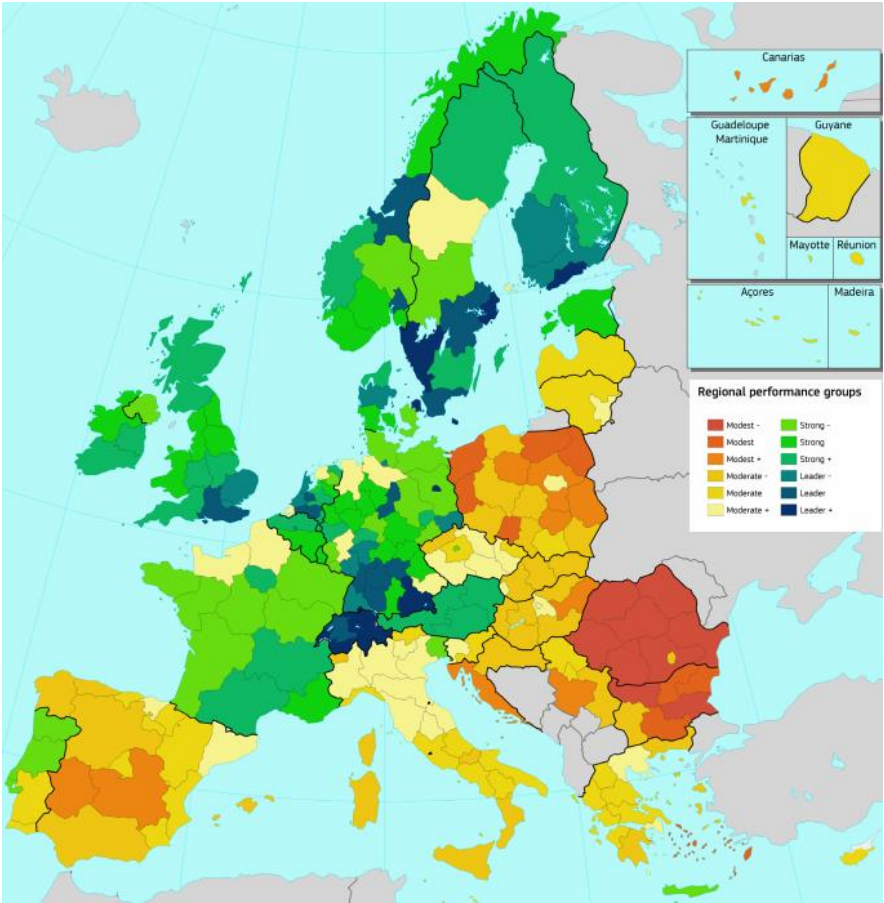
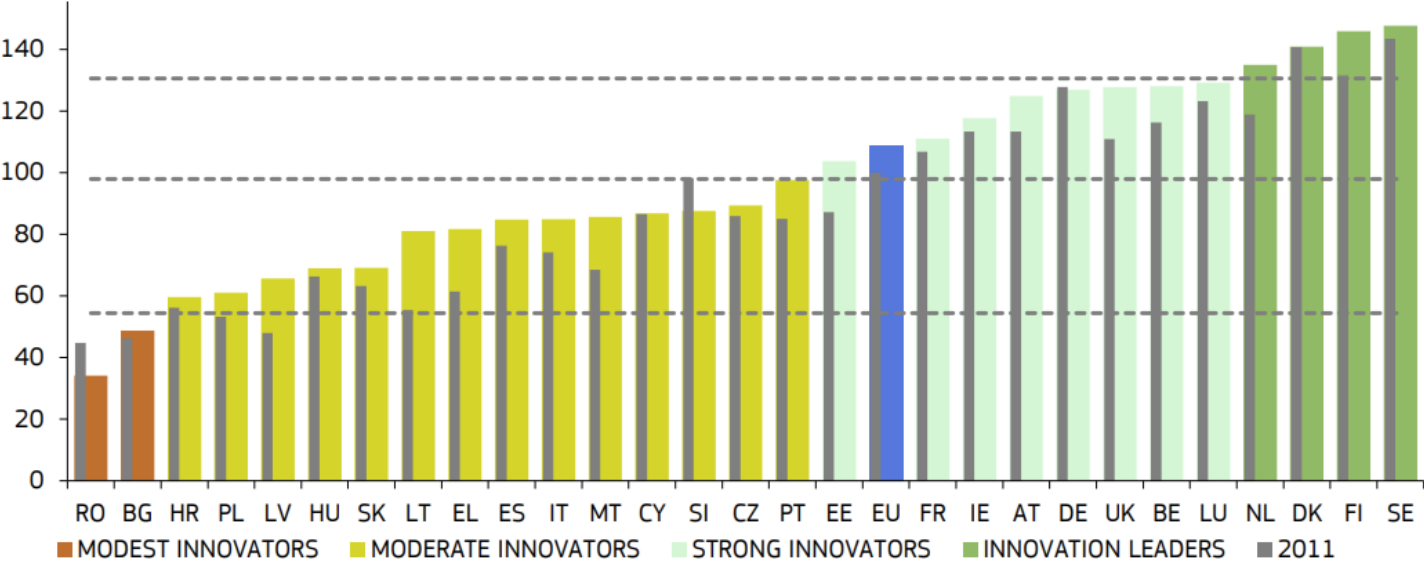
Publicerad: 2019-06-10 08:00 Skriven av: Ibrahim



SWE AND DK IS THE EU INNOVATION LEADERS

Medicon Valley is ranked among the most innovative regions in the EU

EUROPEAN INNOVATION SCOREBOARD 2019



RISE IN THE NUMBER OF PATENTS

Sharp rise in the number of applications in Danish pharmaceuticals

The number of **Danish** patent applications in the life sciences to the European Patent Office (EPO) rose 10% last year

Swedish patent applications rose by 4% – most in biotech – but medical technology continues to dominate

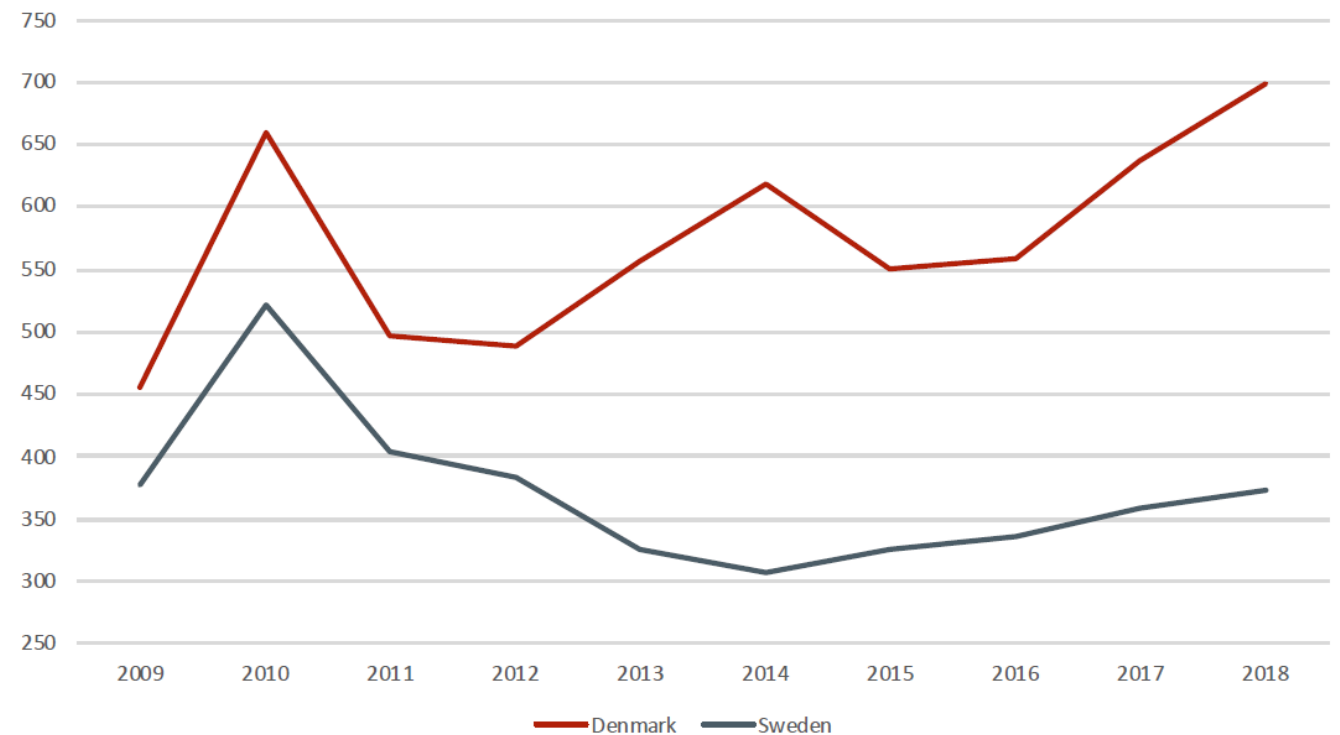
699

Danish life science patent applications to the EPO in 2018

373

Swedish life science patent applications to the EPO in 2018

NUMBER OF LIFE SCIENCE PATENT APPLICATIONS TO EPO FROM SWEDEN AND DENMARK



THE LIFE SCIENCE INDUSTRY IN MEDICON VALLEY

A stagnation in revenue for big pharma, continued growth for biotech and medtech

Organizational changes, new strategies and new products in the leading pharmaceutical companies

Medicon Valley's biotech companies are thriving. Some of the region's biotech companies have entered a strong growth phase

The medtech sector continues to grow on all parameters, turn-over, export and contribution to GDP



RECORD-HIGH LIFE SCIENCE EXPORTS

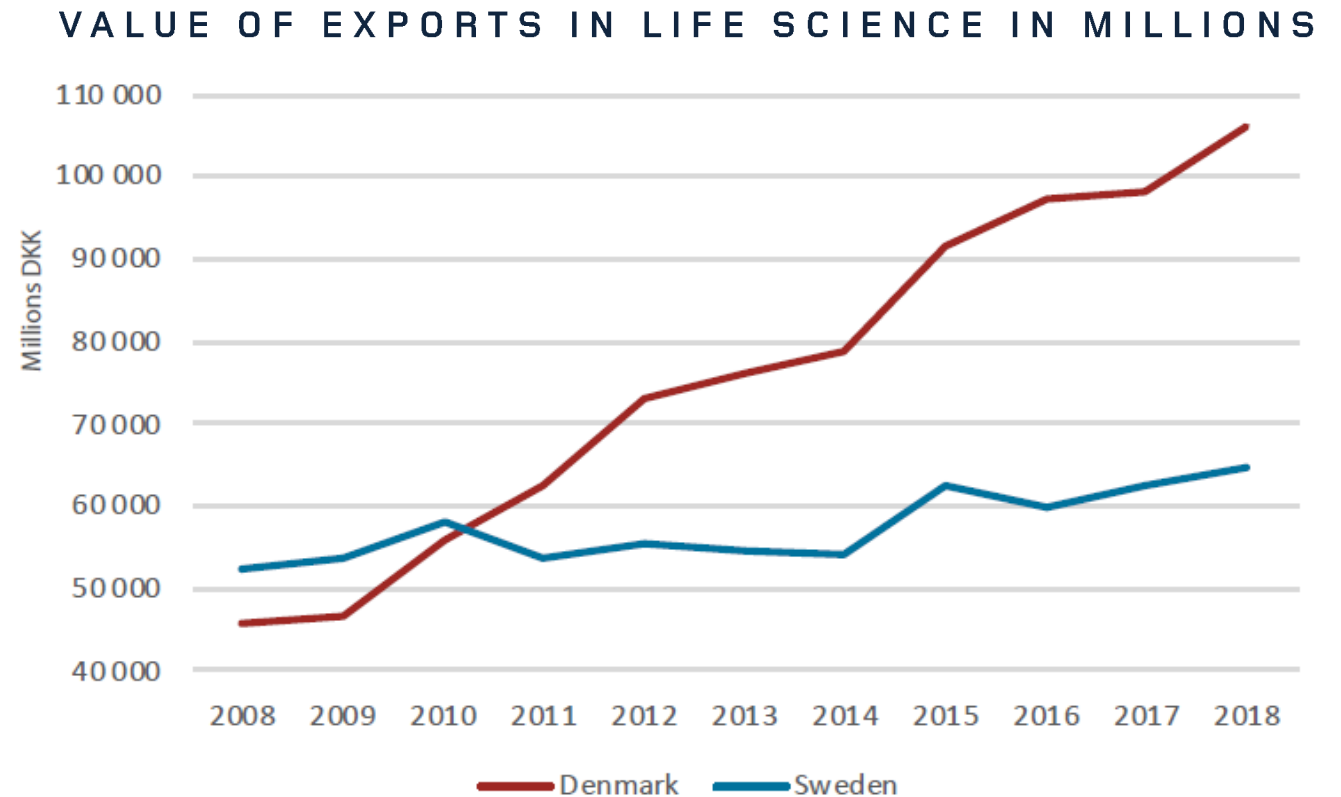
Life science exports from Denmark and Sweden have hit an all-time high

+7.7%

After a modest increase in 2017, Danish life science export rose by 7.7% to 106 billion DKK in 2018

+10.6%

Swedish life science companies gathered new strength in 2018, increasing life science exports 10.6%



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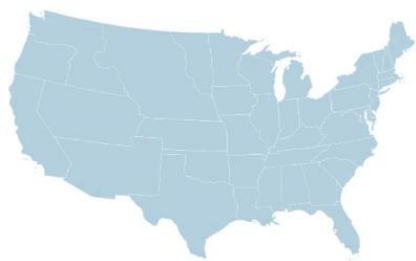
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RECORD-HIGH LIFE SCIENCE EXPORTS

Growing Danish and Swedish life science exports in 2018

USA is the largest export market for Danish life science. **Danish** life science exports to the **USA**, increased in 2018 with 21%



China is the largest export market for Swedish life science. **Swedish** life science exports to China, increased in 2018 with 21%



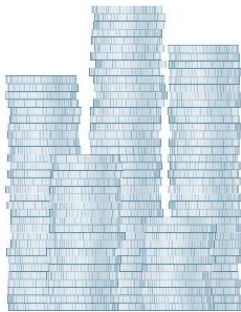
Denmark is the **fourth** largest exporter of life science products per capita, while **Sweden** is the **tenth** largest



INCREASING TAX CONTRIBUTIONS IN LIFE SCIENCE

In 2017 the life science industry contributed more in taxes than in the preceding year

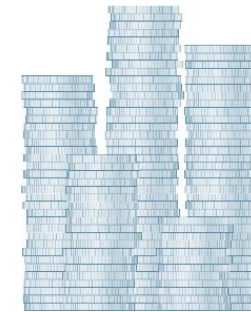
The **Danish** life science sector contributed **19.6 billion DKK** in tax revenue in 2017, which is a 20% increase from 2016



In **Denmark**, revenue from corporation tax has **never been higher**. In **Sweden**, contributions from corporation tax on life science companies is at the **highest level since 2011**



The **Swedish** life science sector contributed **12.7 billion SEK** in tax revenue 2017. This is a 5.2% increase from 2016



RISING EMPLOYMENT IN MEDICON VALLEY

Medicon Valley is home to the largest pool of life science talents in Scandinavia

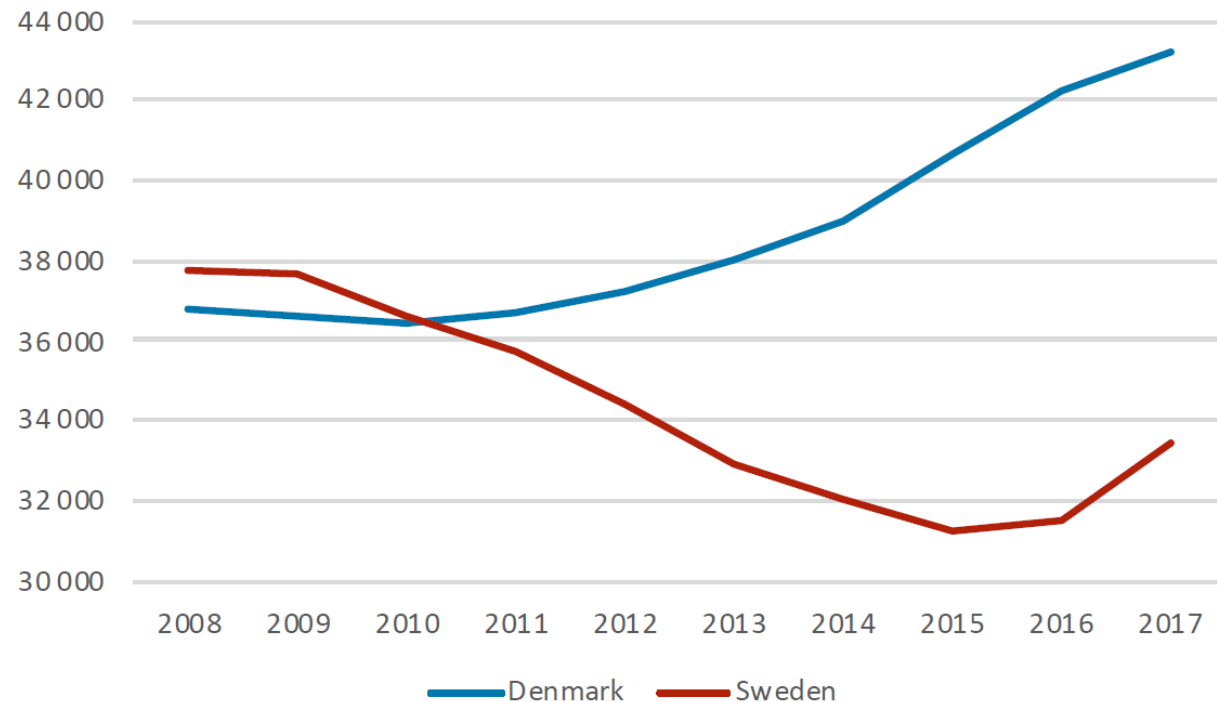
+3.4%

was the increase in number of employees at life science companies in Medicon Valley in 2017

44 000

was the number of employees at life science companies in Medicon Valley in 2017

LIFE SCIENCE EMPLOYMENT IN SWEDEN AND DENMARK



4 SUGGESTIONS FOR THE FUTURE

Actions to make Medicon Valley stronger for the benefit of both Sweden and Denmark

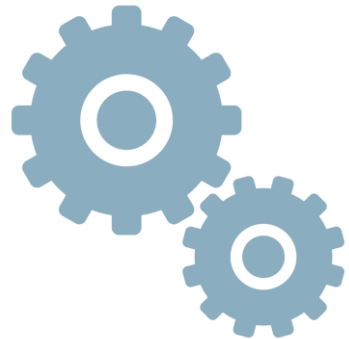
- Ensure national resources to support cross-border research, establishment of private-public consortiums and collaboration platforms in Medicon Valley
- Ensure a cross-border collaboration for clinical trials in Medicon Valley
- Ensure a single coordinated effort to attract international life science talents, venture capital and investments to the region
- Ensure a well-integrated labor market in Medicon Valley, removal of cross-border barriers for commuters and reduced prices for crossing the Oresund bridge



SUMMARY AND MAIN CONCLUSIONS

Life science is in a transformational phase, but is of growing importance for Sweden and Denmark

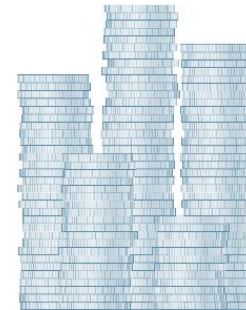
New strategies and initiatives strengthen the life science **innovation** and support system



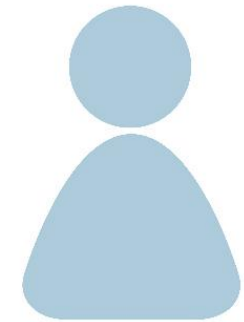
The **growing** Danish and Swedish life science **exports** in 2018 have hit an **all-time high**



The **tax contribution** from employees' income tax and corporation tax **increases** in both countries



Both the Danish and the Swedish life science sector shows **positive employment growth**



A close-up photograph of two hands, one from a darker-skinned person and one from a lighter-skinned person, gently cupping a small green seedling with dark soil. The background is a soft-focus outdoor scene with green foliage and a body of water.

Thank you!

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