



Belgium, your gateway to biotech and pharma excellence

12th & 13th April, 2019

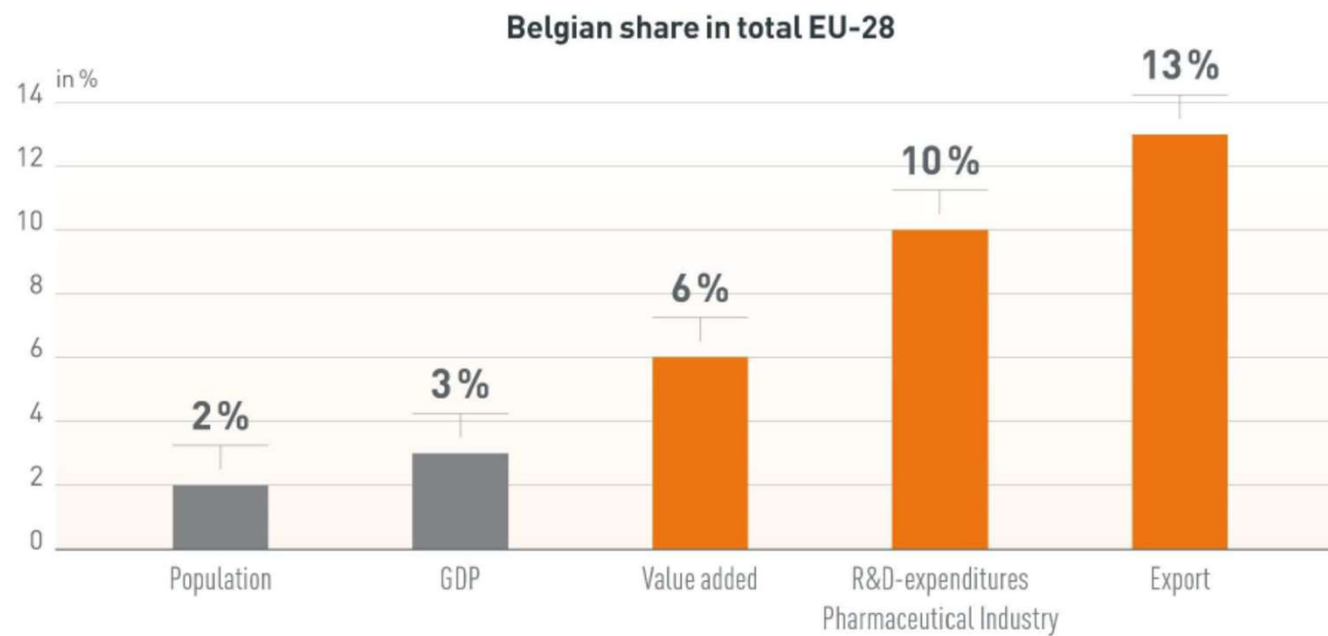
The Taj Gateway Hotel, Kolkata

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Belgium, a key player in the European biopharmaceutical industry



SOURCE EFPIA for R&D expenditures(2015), Eurostat for value added (2014), export, population and GDP (2016)

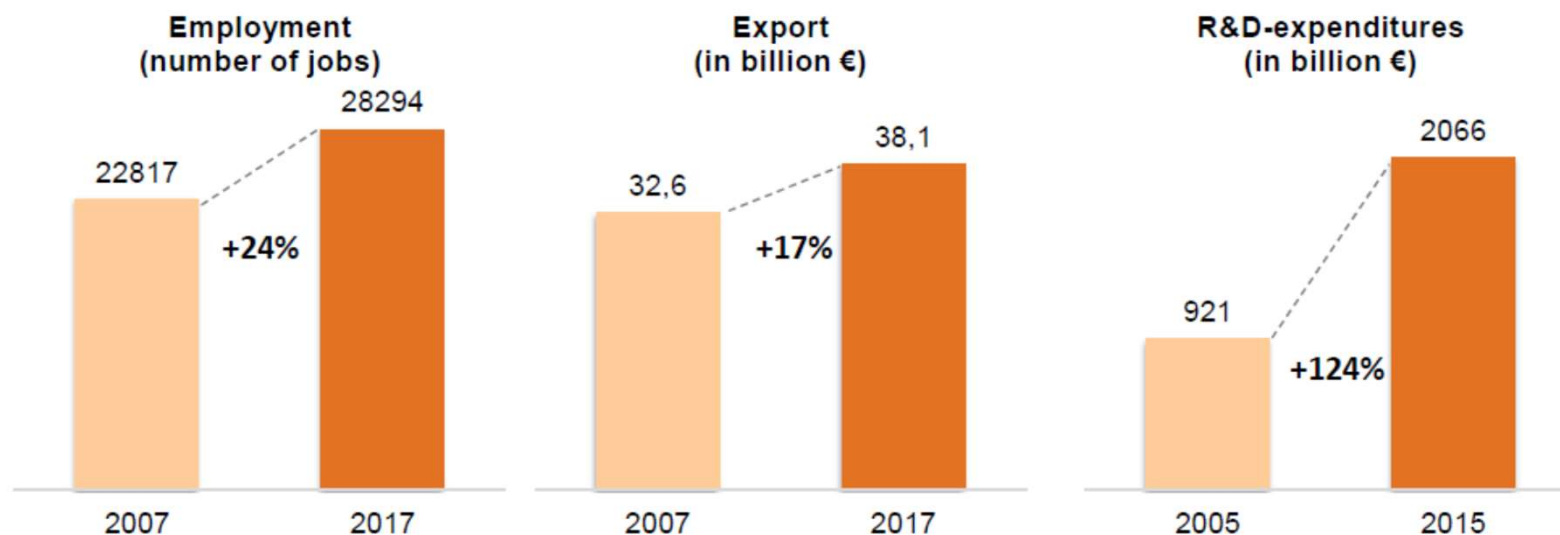
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The biotech/biopharma industry, a growing sector in Belgium

Over the past 10 years, the biotech/biopharmaceutical industry has become a key pillar of the Belgian economy



Source:
Employment: National Social Security Office - decentralised statistics (number of jobs on 30th June); 2017
Export: National Bank of Belgium according to the Communautarian concept (including distribution centers & transit activities)
R&D: based on latest data from Commission for federal cooperation, Working group CFS/STAT; calculations Federal Science Policy Office ; Intramural expenditures – product group approach

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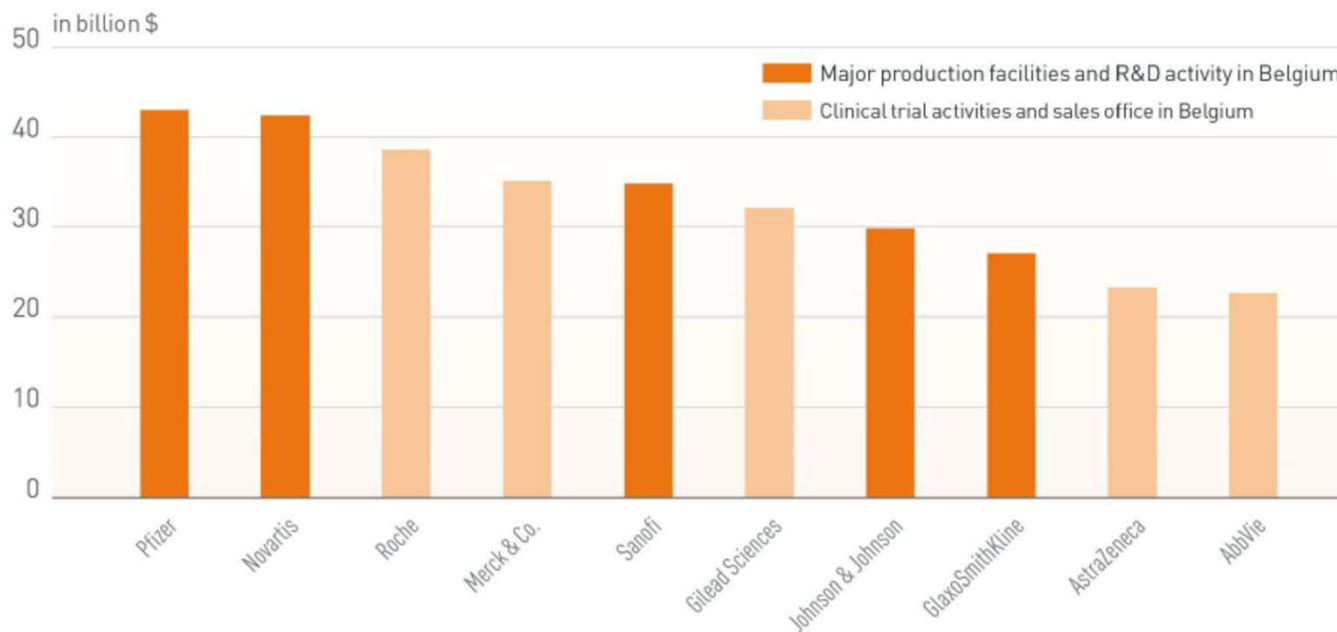


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Key activities of all 10 top global pharmaceutical companies in Belgium

Top 10 biopharmaceutical companies worldwide

Rx sales (2015)



SOURCE PharmaExec.com [based on data from 2016 EvaluatePharma, Evaluate Ltd, www.evaluate.com]

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The Belgian biotech market is thriving

- Belgian biotech represents 31% of the European biotech market capitalization (4,34 €billion)
(source: Euronext-Biotech Bourse, S2 2018)
- Growth 2018: +19.2% vs 2017



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Belgium: investments in biopharmaceutical R&D (2nd in Europe after Denmark)



Expenditure on R&D by pharmaceutical companies conducting research in Belgium (Mios €)

- **3,51 billion €** were invested by pharmaceutical companies in Belgium in 2017
- **Each day in 2017**, pharmaceutical companies invested more than **9,6 Mios €** in R&D in Belgium
- **Of every 8 Mio €** that is invested in R&D in Europe by pharmaceutical companies,
1 Mio € is invested in Belgium

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Belgium, the European leader in clinical trials

Biopharmaceutical companies have access to a vast infrastructure including more than 70 hospitals with high quality clinical departments and well trained staff.

A high percentage of clinical studies in Europe are conducted in Belgium



22,5% of clinical studies in the area of cancer research are performed in Belgium



15,8% of clinical studies to investigate diseases affecting the nervous system take place in Belgium



16,7% of clinical studies conducted to research diseases affecting the immune system are done in Belgium



14,2% of clinical studies in pediatric diseases are conducted in Belgium

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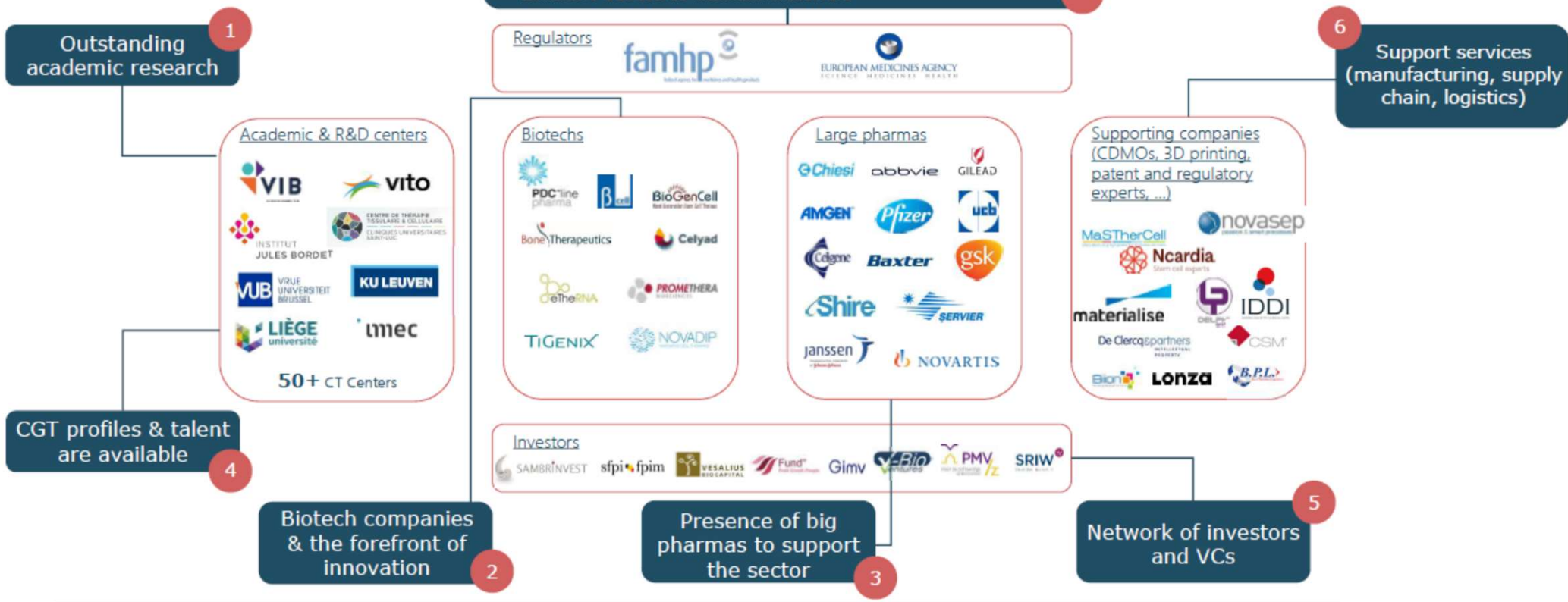


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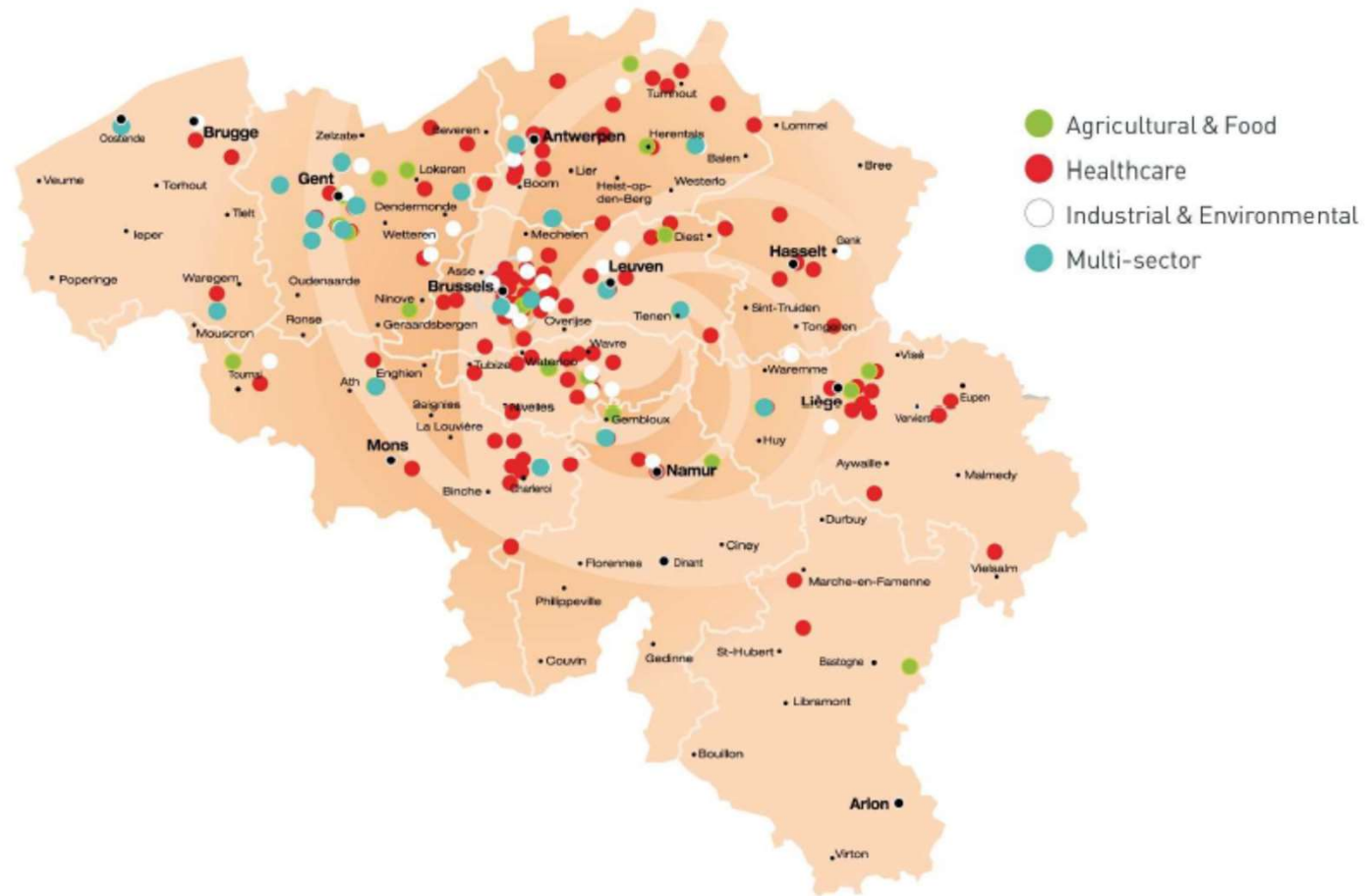
Belgium has a leading position in cell and gene therapy in Europe

Belgium is the place of choice for CGT R&D in Europe:

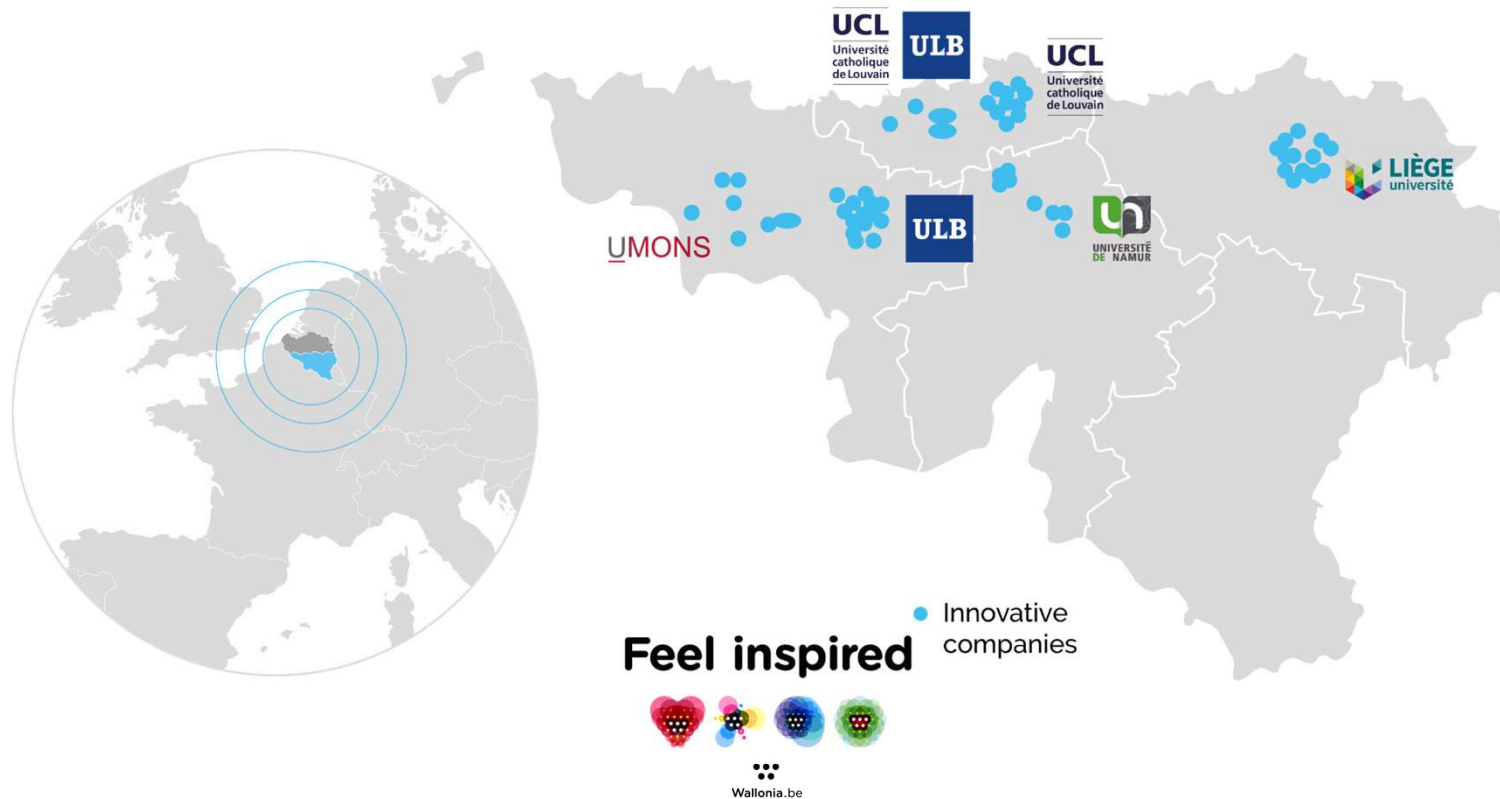
- CGT clinical trial leadership
- CGT regulatory excellence
- Efficient access to human materials



The Belgian biotech landscape



The Belgian biopharmaceutical ecosystem: focus on Wallonia



The Belgian biopharmaceutical ecosystem: focus on Wallonia

Wallonia emerges as a world class biotech and medtech hub

#1

The pharmaceutical sector is the main industrial activity in Wallonia in terms of added value;

54%

In the Belgian pharmaceutical sector the biopharmaceutical sector provides 54% of jobs.

1,2

In 2015, private investment into R&D totalled €1.2 billion

25%

25% of Wallonia export.

50.000

employees in the Life Science Sector (17 000 direct jobs)

1,3b€

Cumulative private investment secured by current BioWin SME members (2005 – 2017)

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Biowin: the innovation cluster in Health

7 

large companies
(>250 FTE) : UCB,
GSK, Baxter/
Baxalta, Zoetis, IBA,
Eurogentec and IRE

32 

medium companies
(>50 FTE)

144 

small companies

5 

universities

4 

research centers



BioWin, your gateway to **health**
biotech and **medtech excellence**



WWW.BIOWIN.ORG

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Biowin: the innovation cluster in Health

Biopharmacy

- Development of therapeutic or prophylactic agents for the treatment or prevention of various diseases (oncology, neurology, infection, metabolic diseases, autoimmune diseases, etc.). This strategic activity also aims to develop activities related to the research and development of molecules (drug discovery, preclinical activities, clinical trials)

Cell Therapy

- The development of innovative therapies to regenerate, repair or replace a human organ or tissue. The focus of this area is on cell therapy and tissue engineering applied to osteoarticular, cardiac, metabolic, neurodegenerative and autoimmune diseases and to oncology.

Radiation applied to health

- The use of ionizing radiation (external sources or isotopes) for the diagnosis and treatment. The focus of this area is on the development of imaging-based devices, biomarkers, instruments and support tools for decision making.

Medical devices & *in vitro* diagnostic

- The development of devices, equipment, apparatus and reagents intended for (1) providing, by means of an *in vitro* test, information relating to physiopathological condition of a patient (*in vitro* diagnosis); or (2) monitoring and/or providing relief or treatment of a pathology, injury or disability by means other than medication (i.e. a medical device). This area also includes the development of the electronic and software components.

Biomanufacturing

- Biomanufacturing includes (bio)pharmacy and cell therapy and covers the production of agents for diagnostic or therapeutic purposes by living organisms (bacteria, yeasts, cells of higher organisms). This area focuses on three aspects: the genetic bioengineering of organisms, the design and optimization of production processes, and the design of equipment needed to form the production chain.

Data-driven science

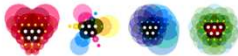
- The development of approaches that exploit a large-scale data sets (Big Data) and artificial intelligence to improve healthcare interventions, including personalized medicine.

Biowin: international partnerships and networks

Partnerships **N**etworks



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Wallonia: your Belgian gateway for your activities and exports in and outside the EU

The combination of several focused regulatory and tax measures and incentives make Belgium one of the most attractive locations for biopharmaceutical R&D and manufacturing companies in the EU.

- R&D incentives
 - Investment incentives
 - Tax deduction on patent income
- Employment incentives (tax credits for R&D and reduced employment charges for foreign researchers)

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