

Building a Sustainable Bioeconomy – the Canadian Perspective

Peter Brenders, BIOTECanada
European Forum for Industrial Biotechnology
Amsterdam, Oct. 20, 2011

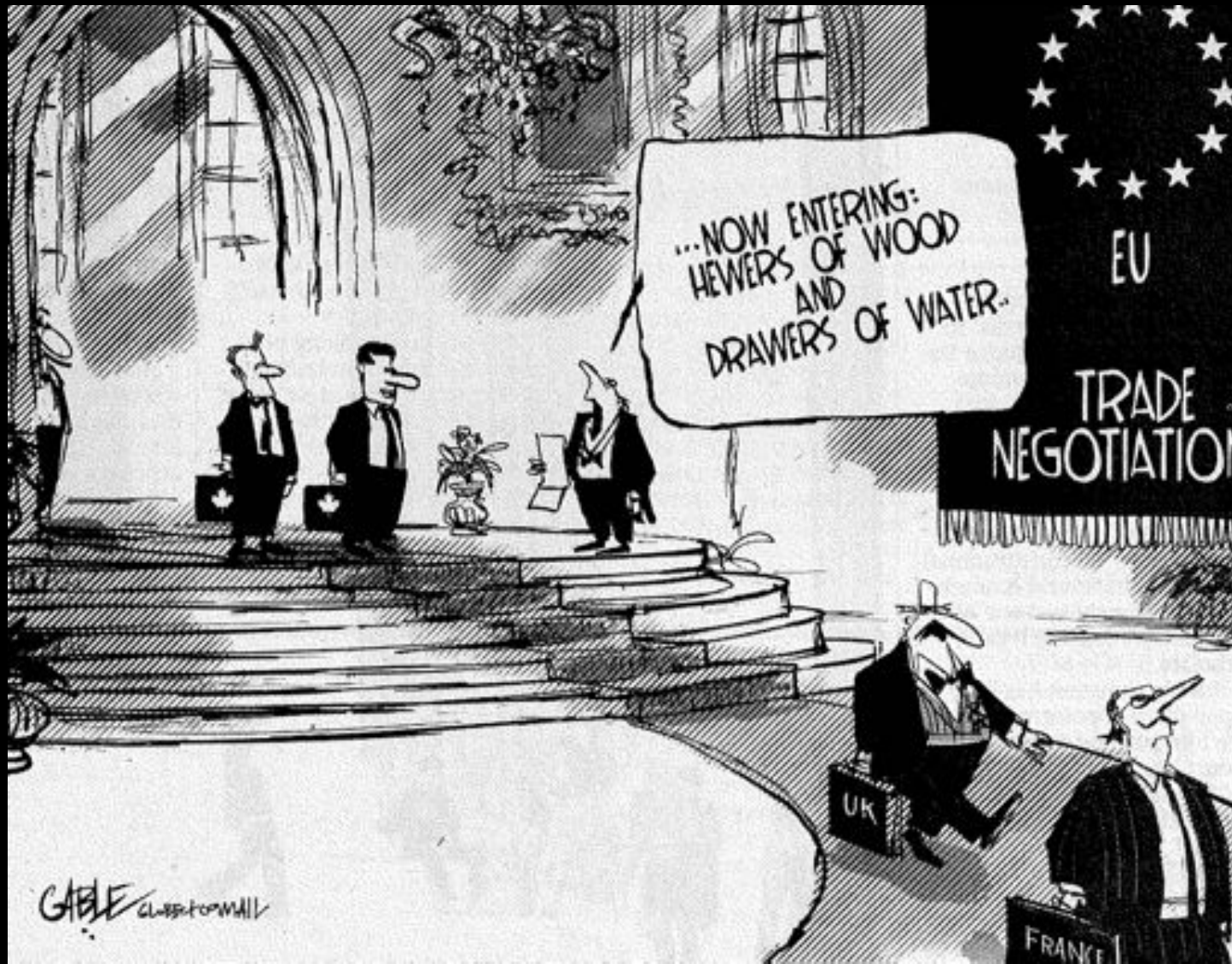
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Who we are...

BIOTECanada is the national association representing the broad spectrum of biotech constituents including emerging and established companies in **health**, **agriculture** and **industrial** sectors, as well as academic and research institutions and other related organizations including investors and financial institutions.

- BIOTECanada is fully industry funded
- 240+ company members

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Industry's Introspective

- Where are we going?
- So what's our goal?
- What's the point of the changes we want? So what?

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“Houston, we’ve had a problem.”

**James Lovell, Apollo 13
14 April 1970**

Going beyond tradition

- Leader in
 - Science and innovation
 - Learning and growth
 - Development and technology
- Capitalize on our resources -
Biotechnology and bio-based economy will be the catalysts for the next wave of innovation and Cdn prosperity

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Industry's Big Hairy Audacious Goal

By the year 2020, Canada will
become the world's leading
bio-based economy

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What does this mean to us?

- New jobs, new knowledge-based industries, new long-term prosperity
- New global competitiveness for traditional industries
- Canadian bio-based solutions actively sought and contributing to global needs in health, food, energy and environment
- Canada leading in development and adoption of new bio-based technologies
- Canada will be the most competitive business jurisdiction for bio-based industries

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What we're doing...

- An enabling operational environment aligning government policies, regulations for research & commercialization
- Develop, attract and retain world-class talent in both research and commercialization
- New capital formation, world-leading efficiency in the use of capital, and the most bio-friendly tax regime in the world

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New Economy Alliance

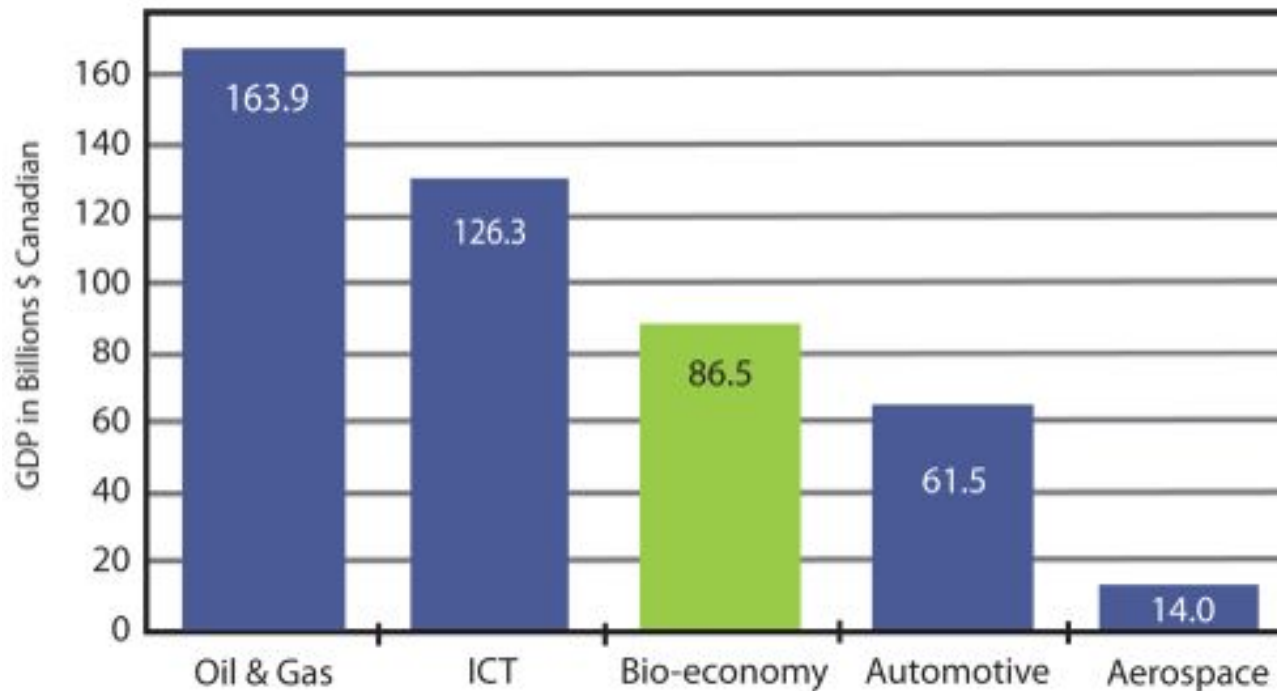
To develop a world-leading bio-economy that adds value to our vast wealth of natural resources, creates high-value jobs, generates economic growth, enhances Canada's international competitiveness and improves our environment

- BIOTECanada
- Canadian Federation of Agriculture
- Canadian Renewable Fuels Association
- Chemistry Industry Association of Canada
- CropLife Canada
- Forest Products Association of Canada
- Sustainable Chemistry Alliance

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We have a good start...

Industry Comparison by GDP

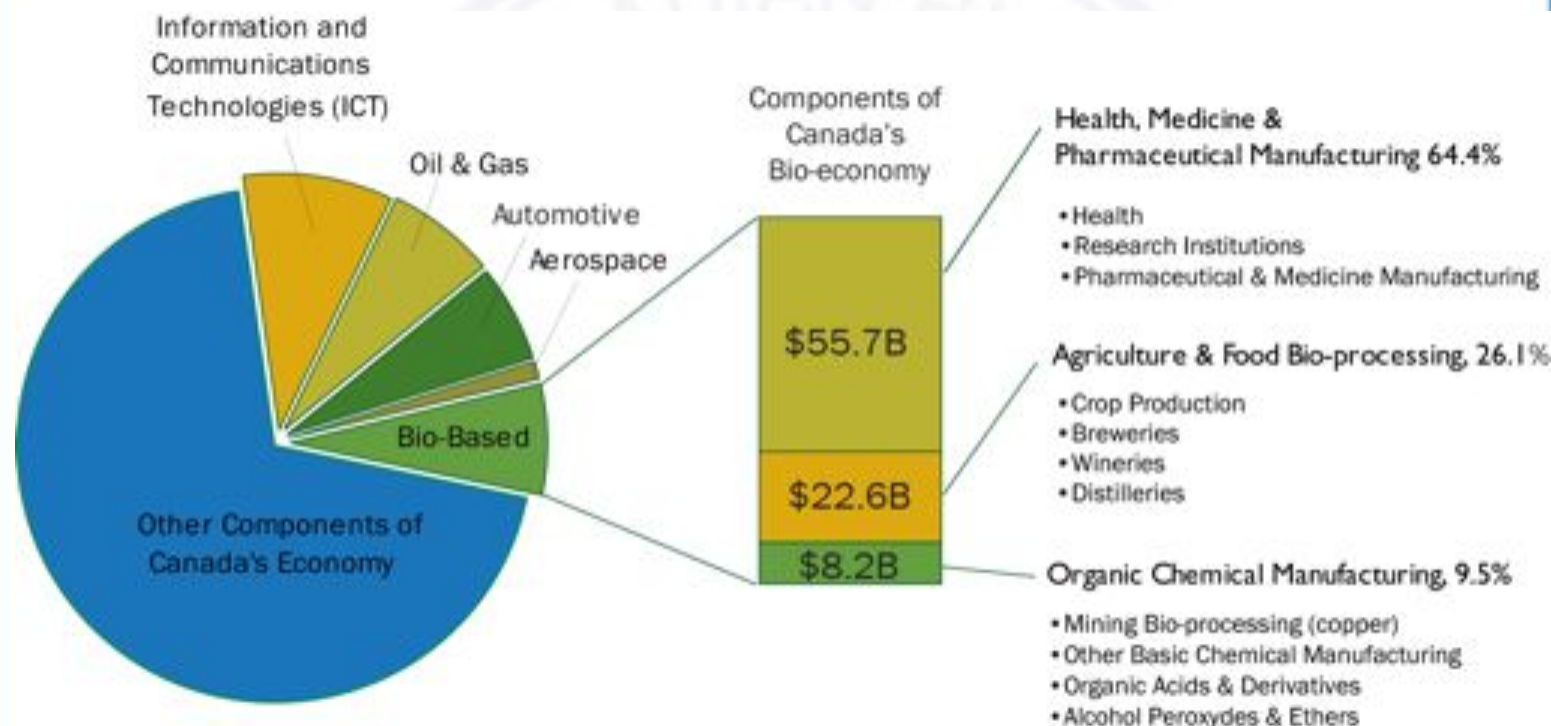


Sources: Source Data - Statistics Canada, CANSIM Table 379-0027

Methodology - Industrial Biotechnology. December 1, 2008, 4(4): 363-366. doi:10.1089/ind.2008.4.363

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Breakdown of Canada's Bio-economy

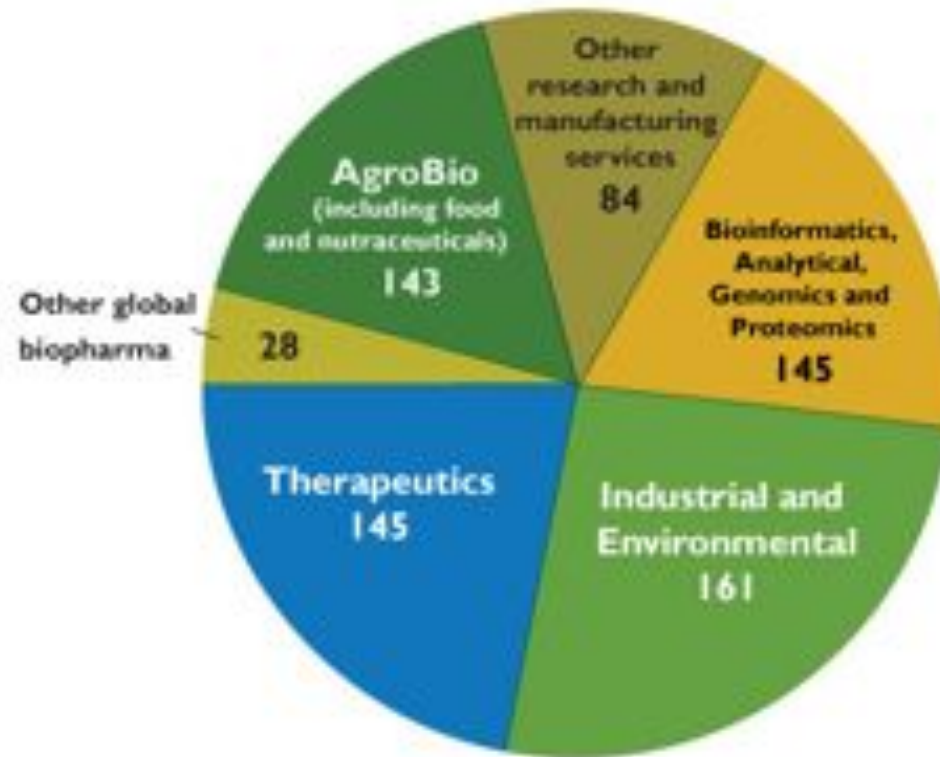


Sources: Source Data - Statistics Canada, CANSIM Table 379-0027

Methodology - Industrial Biotechnology. December 1, 2008, 4(4): 363-366. doi:10.1089/ind.2008.4.363

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Canadian Bio-based Industry



Total biotech development companies 583

NOTE: Fields do not add as some companies work in multiple fields.

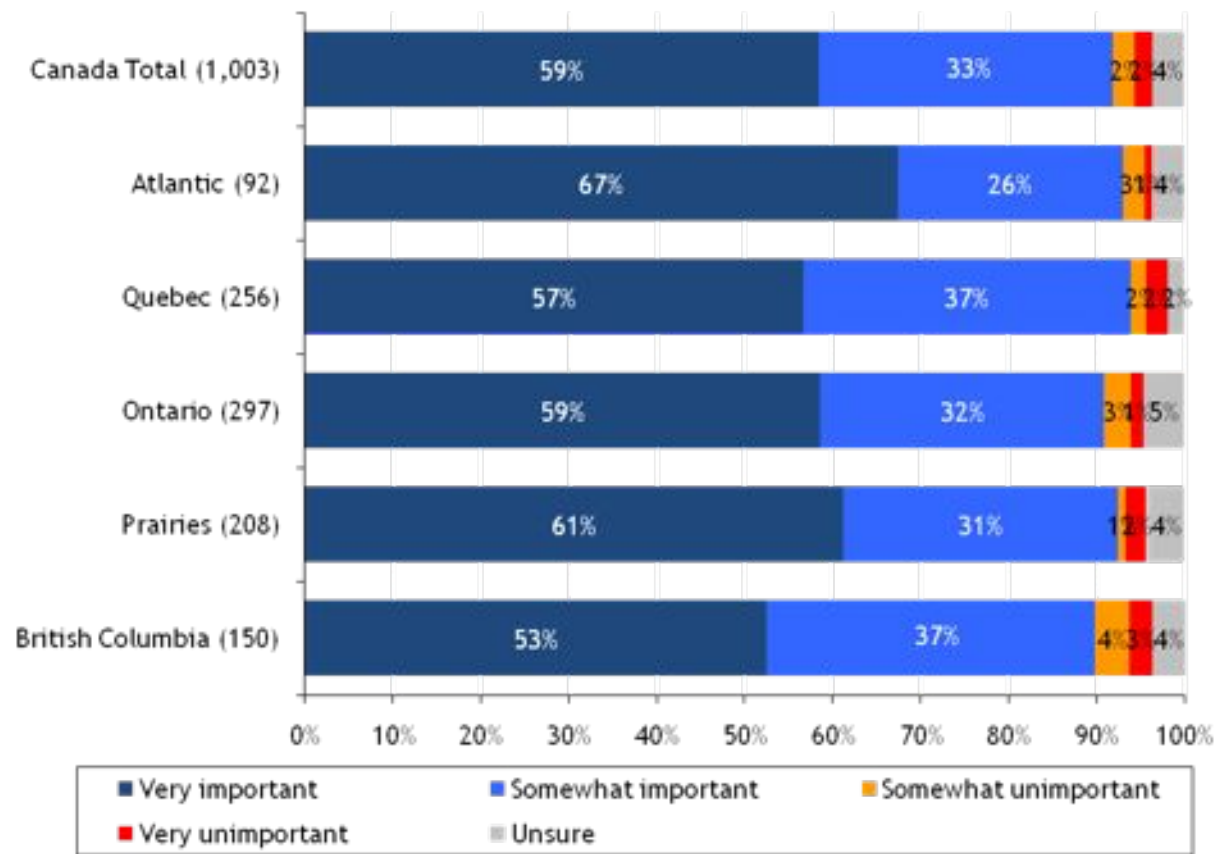
Source: Canadian Life Sciences Database. Last Accessed January 1, 2011.

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Canadians view biotechnology as important to Canada's future economic prosperity

Source: BIOTECCanada commissioned **Nanos Research**, to conduct a random telephone survey of 1,003 Canadians from August 28th to September 2nd, 2009. The margin of accuracy for a sample of 1,003 is $\pm 3.1\%$, 19 times out of 20.

Nine out of ten Canadians see biotech as important to Canada's future economic prosperity

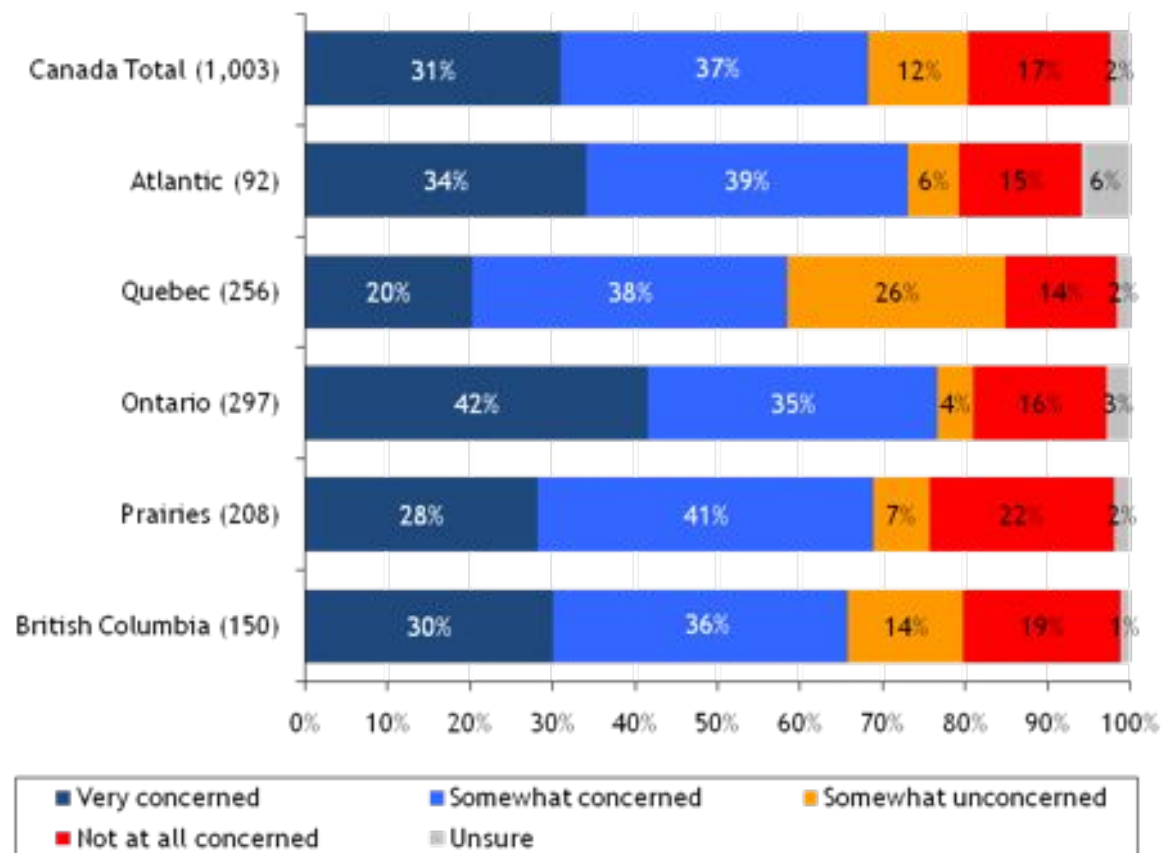


As you may know, biotechnology is a term that describes the controlled use of biological substances to make a wide variety of products in our everyday lives. Biotechnology innovations can create special drugs or vaccines, healthier crops that do not need pesticides, can turn waste into energy, can find new ways to make foods or can even convert plant matter into new products like car parts.

Do you believe that the biotechnology industry is a very important, somewhat important, somewhat unimportant or very unimportant part of Canada's future economic prosperity?

Source: Nanos Research, Random Telephone Survey of 1,003 Canadians from August 28th to September 2nd, 2009. The margin of accuracy for a sample of 1,003 is $\pm 3.1\%$, 19 times out of 20.

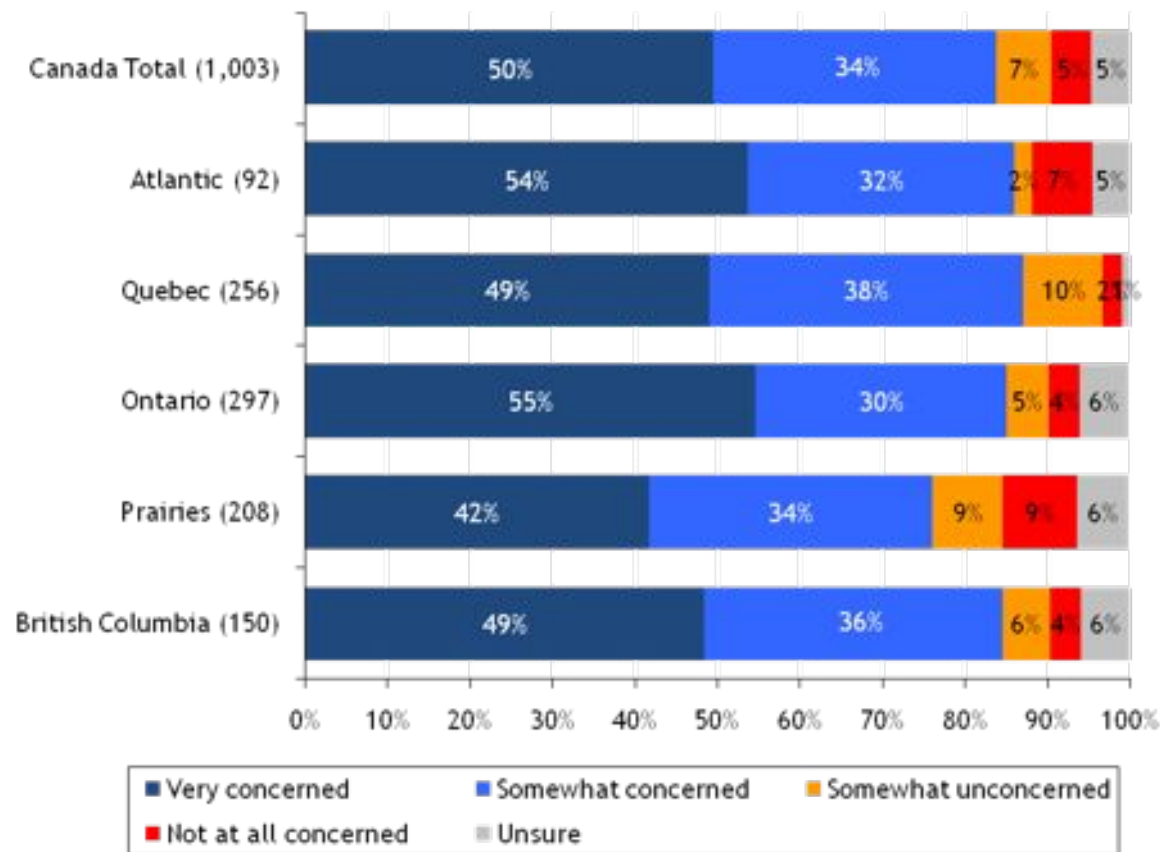
Canadians are concerned about Canada's global competitiveness in science and technology



Are you very concerned, somewhat concerned, somewhat unconcerned or not at all concerned about Canada's global competitiveness in the field of science and technology?

Source: Nanos Research, Random Telephone Survey of 1,003 Canadians from August 28th to September 2nd, 2009. The margin of accuracy for a sample of 1,003 is $\pm 3.1\%$, 19 times out of 20.

Vast majority of Canadians are concerned about the loss to Canada of these emerging Canadian biotech companies



As you may know, the economic downturn has hit many of the emerging Canadian firms that use biotechnology very hard. Many of these emerging Canadian biotechnology companies may end up being purchased by foreign companies at below market value.

Would you be very concerned, somewhat concerned, somewhat unconcerned or not at all concerned about the loss to Canada of these emerging Canadian biotechnology companies?

Source: Nanos Research, Random Telephone Survey of 1,003 Canadians from August 28th to September 2nd, 2009. The margin of accuracy for a sample of 1,003 is $\pm 3.1\%$, 19 times out of 20.

Progress takes time but is happening

- Changes to Income Tax Act for easier foreign investment (Sec 116)
- \$350 million new venture funds; \$100 million new loan programs; \$250 million Ontario Emerging Tech Fund; \$700 million Quebec Fund-of-funds
- Doubled IRAP funding
- Recapitalized SDTechFund - \$500 million
- Annual bio-economy roundtable with federal and provincial governments for greater coordination
- National bio-products strategy under development

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Sarnia Bio-Industrial Park

Access power, infrastructure, marine terminal, and business services in an established industrial area



Canada: A Strategic Choice for Investment

1. Globally recognized research and innovation excellence
2. Quality, cost-effective research and development
3. Strong business fundamentals with
 1. most stable banking system
 2. competitive R&D tax incentives
 3. lowest corporate taxes in G8
4. Gateway to North American markets
5. Track Record of Excellence
6. *3rd largest Life Sciences industry in the world**, with a research community of over 100 institutes & 30,000 scientists

*in terms of number of companies and employment

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Biotech Files New Patent on Bone Tissue Regeneration Invention --- Lundbeck Canada puts \$2.7 million towards depression

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CANADIAN LIFE SCIENCES DATABASE

On this site you have free access to a very comprehensive directory and information platform comprising data of Life Sciences and Biotechnology companies and institutes in Canada including company description, additional information and categorization.

This database is sponsored by BIOTECCanada, the national industry association representing Canada's biotechnology industry. Through its national network of partner organizations, BIOTECCanada aims to inspire the domestic and international community to recognize the value of biotechnology and to provide solutions to the challenges faced by biotech firms today. Visit BIOTECCanada's [Business Solutions](#) page to learn about how your organization can benefit from the cost-savings programs offered.

CANADIAN LIFESCIENCES DATABASE ON TWITTER

The Canadian Lifesciences Database is now on Twitter. Follow "CanadianLifesciences" (@CLSD) for important updates on Canada's community of companies, investors and partners in the lifesciences.



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Search within BIOTECCanada members only.

Company name

Free text

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 British Columbia
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in sector / Subsector

Biotechnology - Therapeutics and Diagnostics (incl. all subsect)
 Anti-infectives
 Antibodies
 Biosimilars
 Cell therapy
 Drug delivery
 Gene therapy



white knight in Valeant --- Paladin to buy biotech Labopharm in C\$20 mln deal --- Biotech and pharma see M&A increase in

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MAP SEARCH LIFE SCIENCES MAP OF CANADA

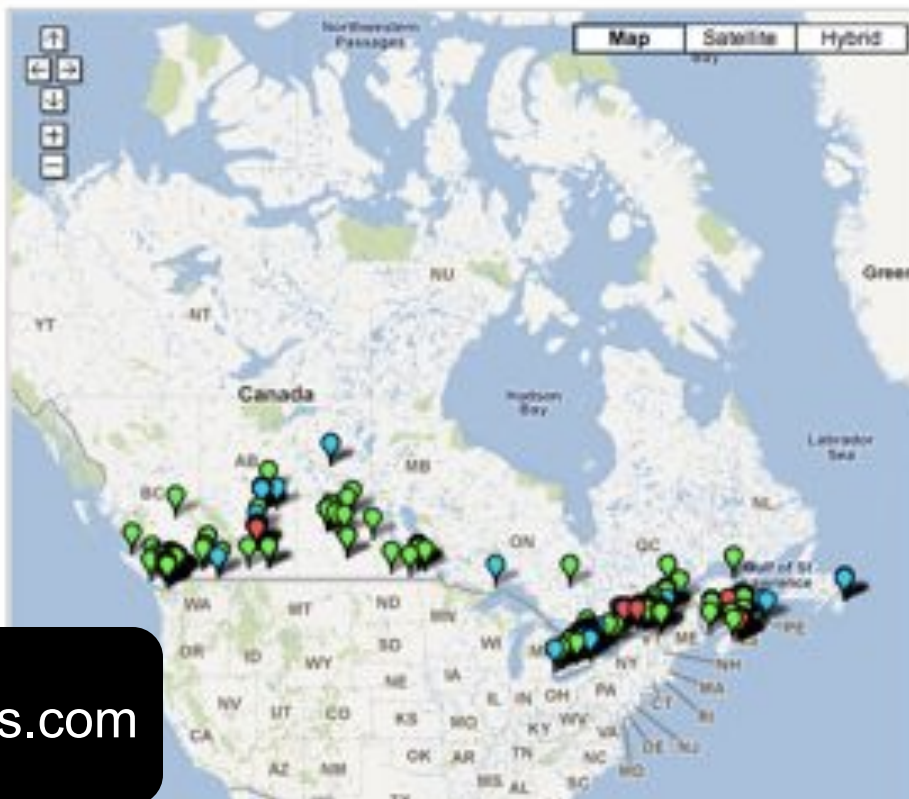
- Biotech Therapeutics & Diagnostics
- Biotech / R&D Services
- Biotech - other
- Pharma
- Medical Technology
- Other



company name:

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--- Antibiotic resistance found in ancient bacteria --- Intravenous virus eyed as possible cancer treatment --- Kane Biotech Files

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COMPANY OVERVIEW

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3M
London, Ontario, Canada

Main sector Medical Technology

- Subsector**
- Other
 - Dental devices
 - Reusable instruments
 - Wound care

Products on the market: 4

Description:
3M is a diversified technology company which produces thousands of products, including adhesives, abrasives, laminates, passive fire protection, dental products, electrical materials, electronic circuits and optical films.

4Refuel
Langley, British Columbia, Canada

Main sector Professional Services and Consulting

- Subsector**
- Other
 - Management consulting
 - Operations/Health & safety/Purchasing

Description:
4Refuel is Canada's largest Fuel Management organization specializing in onsite delivery, fuel logistics, automated fleet management and biodiesel solutions.

5HT MediChem
Vancouver, British Columbia, Canada

Main sector Biotechnology / R&D Services

- Subsector**
- CRO (Contract Research Organization)
 - Diagnostic services
 - Drug delivery
 - Screening
 - Synthesis services

Description:
5HT MediChem is a Canadian biotech company offering integrated drug discovery and specialized services in medicinal chemistry with a special focus on CNS compounds.

Endocrine, nutritional and metabolic diseases
Mental and behavioural disorders
Diseases of the nervous system
Cardiovascular

Canada: 18

For more info...

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