

The 3rd BioCentury-BayHelix

# EAST-WEST BIOPHARMA SUMMIT: SINGAPORE

Organized by BioCentury and BayHelix in collaboration with McKinsey & Company

## The Arc of Innovation

Regional strengths in new modalities signal Asia  
as a rising source of value-driving assets

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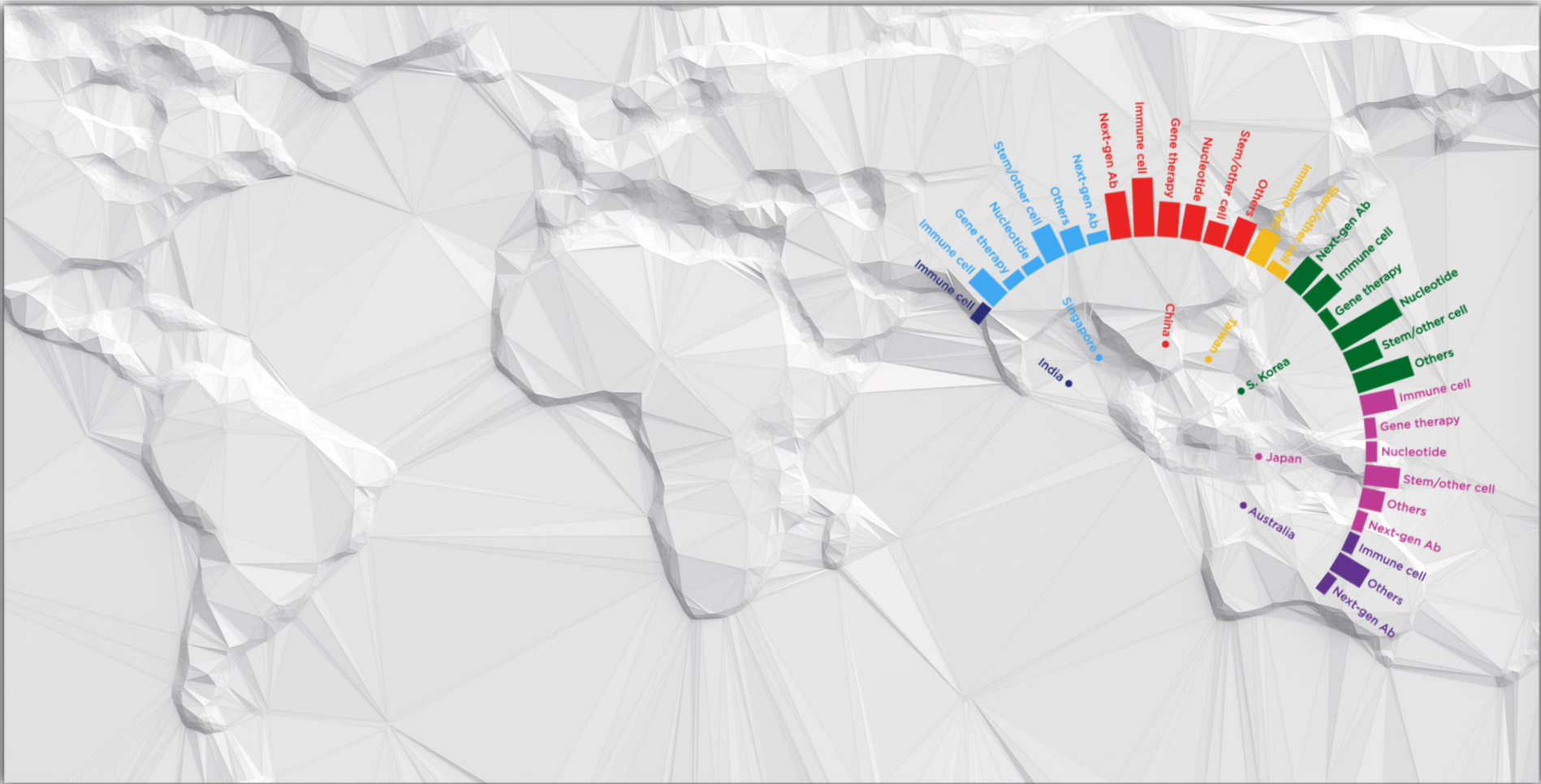


# Across APAC, an Arc of Innovation arises

From India through Asia to Australia, entrepreneurs push biomedical frontiers

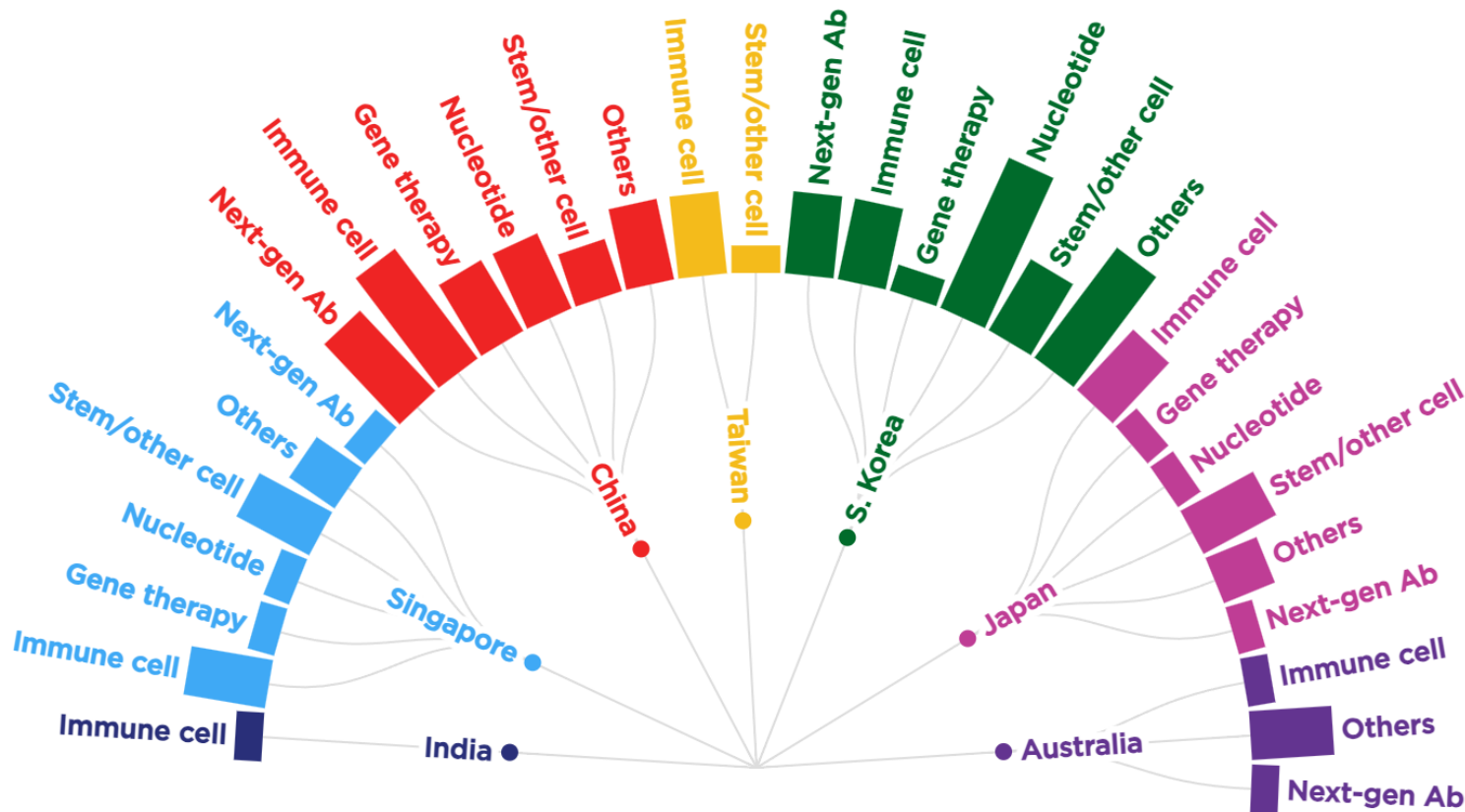
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# New technologies signal APAC competitiveness

Regional strengths cover the major new modalities, making Asia-Pacific a growing destination for sourcing value-driving assets. The assets in the chart below have yet to be partnered.



Unpartnered programs in advanced modalities from Asia-Pacific biotechs founded since 2014

Source: BCIQ







# Technology hotspots start to appear

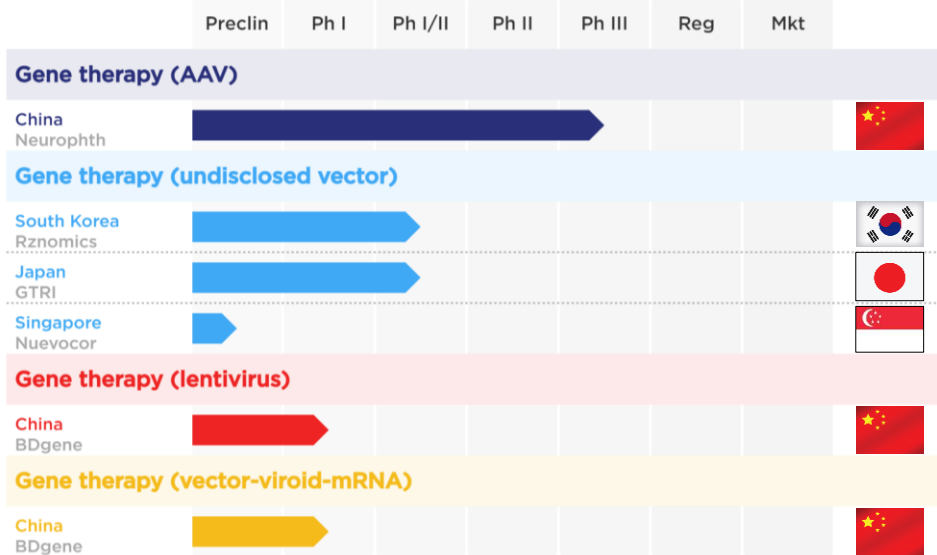
S. Korea and China are growing centers for gene therapies and RNA modalities

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## Gene therapies



## Nucleic acid therapies



- While Singapore's RNAscence has taken an RNAi therapy to market, S. Korea and China feature several new RNA types and gene therapies that are as yet unpartnered

# Methodology

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The analysis was designed to assess the state of innovation in new modalities across different regions in Asia-Pacific, focusing on companies formed within the last decade. To assess where future dealmaking may go, it highlights unpartnered assets, and to ascertain regional hotspots, it focuses on the most advanced programs in development for specified technologies

- The analysis was performed in Feb 2024. It includes:
  - Companies in Asia-Pacific founded since 2014
  - Products without partners to market in West
- Pipeline charts show most advanced product for each modality, in each region, from these companies
  - For example, for CAR T cells, the most advanced in India is Phase II, in Australia and China is Phase I/II, in Japan, Singapore and S. Korea is Phase I, and in Taiwan is preclinical
- Radial chart shows total number of modalities by class within each country.
  - For example, Singapore's unpartnered assets cover three new modality types within immune cells (CAR T, TCR, NKT cells)
- Analysis excludes:
  - Traditional modalities, including small molecules, antibodies, fusion proteins, peptides and preventative vaccines
  - Biosimilars

# On the Road in 2024

May 12-14, 2024



## SAN SEBASTIÁN

Now in its 24th year, BioEquity Europe is where CEOs and investors gather to network, partner and debate critical issues facing the biotech industry. Join BioCentury, EBD Group and Regional Host Committee Chair Ysios Capital in one of the culinary capitals of the world.

Sept. 9-11, 2024



## NASHVILLE

BioCentury Grand Rounds is a new interdisciplinary forum of top academic and biopharma R&D leaders to showcase groundbreaking research, clinical insights, and transformative technologies with significant commercial potential.

Oct. 30 - Nov. 1, 2024



## SHANGHAI

BioCentury, BayHelix and Insights Partner McKinsey & Company return to Shanghai for our 11th China Healthcare Summit with a focus on reengagement and cross-border collaboration.

Nov. 19, 2024



## LONDON

Join BioCentury and BIA for our 2nd annual biotech summit on the sidelines of the Jefferies London Healthcare Conference.

Dec. 2024



## BOSTON

Join BioCentury for our 4th annual "Bending the Curve" Networking Dinner and meet industry, academic and financial leaders from across biopharma's hottest ecosystem.

Jan. 2025



## SAN FRANCISCO

Join BioCentury, Panacea Venture and Maytech Global for our 11th East-West Networking Reception for C-level executives, held on the sidelines of the annual J.P. Morgan Healthcare Conference.

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