

# LIFE SCIENCE TREND ANALYSIS

GERMANY | 2025



VENTURE VALUATION  
GLOBAL VALUATION SERVICES



2024 ANALYSIS



# ABOUT US



The following statistical information has been obtained from Biotechgate, a global, comprehensive life science database encompassing the biotechnology, pharmaceutical and medical device industries.

[www.biotechgate.com](http://www.biotechgate.com)



The German Biotech Database is a part of the global Biotechgate and is brought to you in partnership with BIO Deutschland, BIO.NRW, BioRN, and GTAI Germany Trade & Invest/HEALTH MADE IN GERMANY.

[www.germanbiotech.com](http://www.germanbiotech.com)

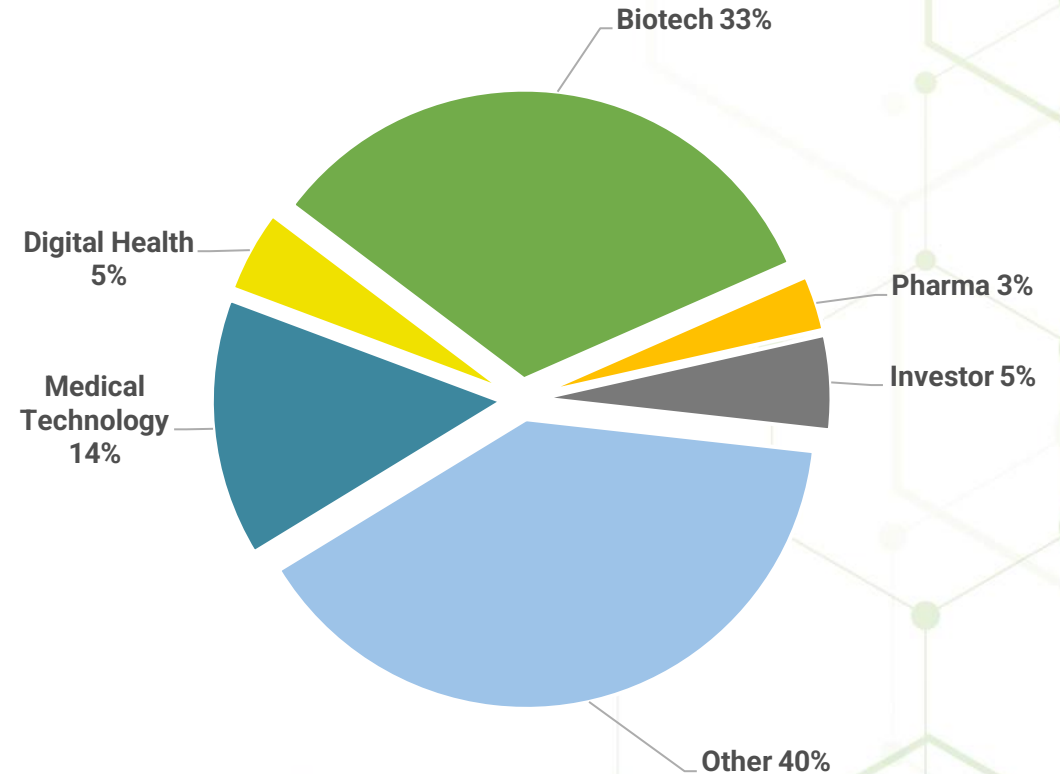


Biotechgate is owned and operated by Venture Valuation AG, a Zurich based company specializing in independent assessment and valuation of technology-driven companies in high growth industries, such as the life sciences (biotech, pharma, medtech), ICT, high-tech, nanotech, cleantech and renewable energy.

[www.venturevaluation.com](http://www.venturevaluation.com)

# OVERVIEW OF THE LIFE SCIENCE INDUSTRY

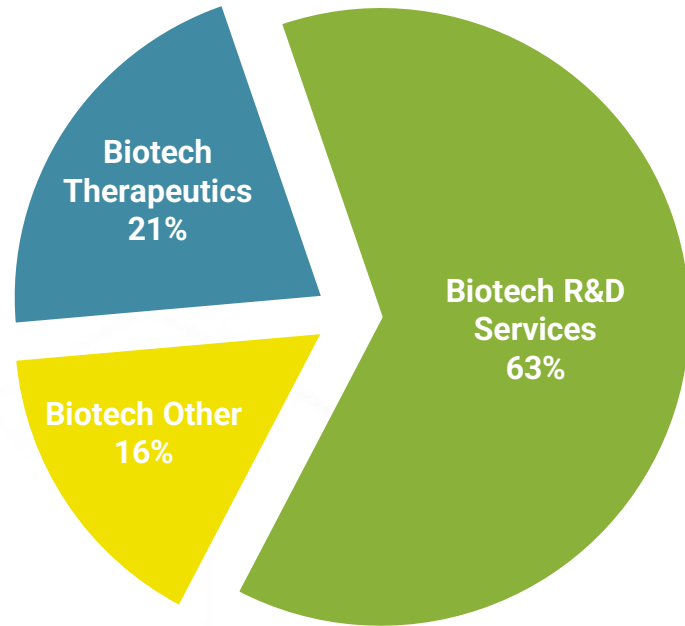
## NUMBER OF COMPANIES BY SECTOR



For the definition of categories please visit [www.biotechgate.com/web/cms/index.php/covered\\_industry\\_sectors.html](http://www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html). Biotech Companies include the following categories: Biotechnology – Therapeutics and Diagnostics; Biotechnology – R&D; Biotechnology – Other. Percentage value is expressed as % of total number of companies. Information displayed may alter as new information is received continuously

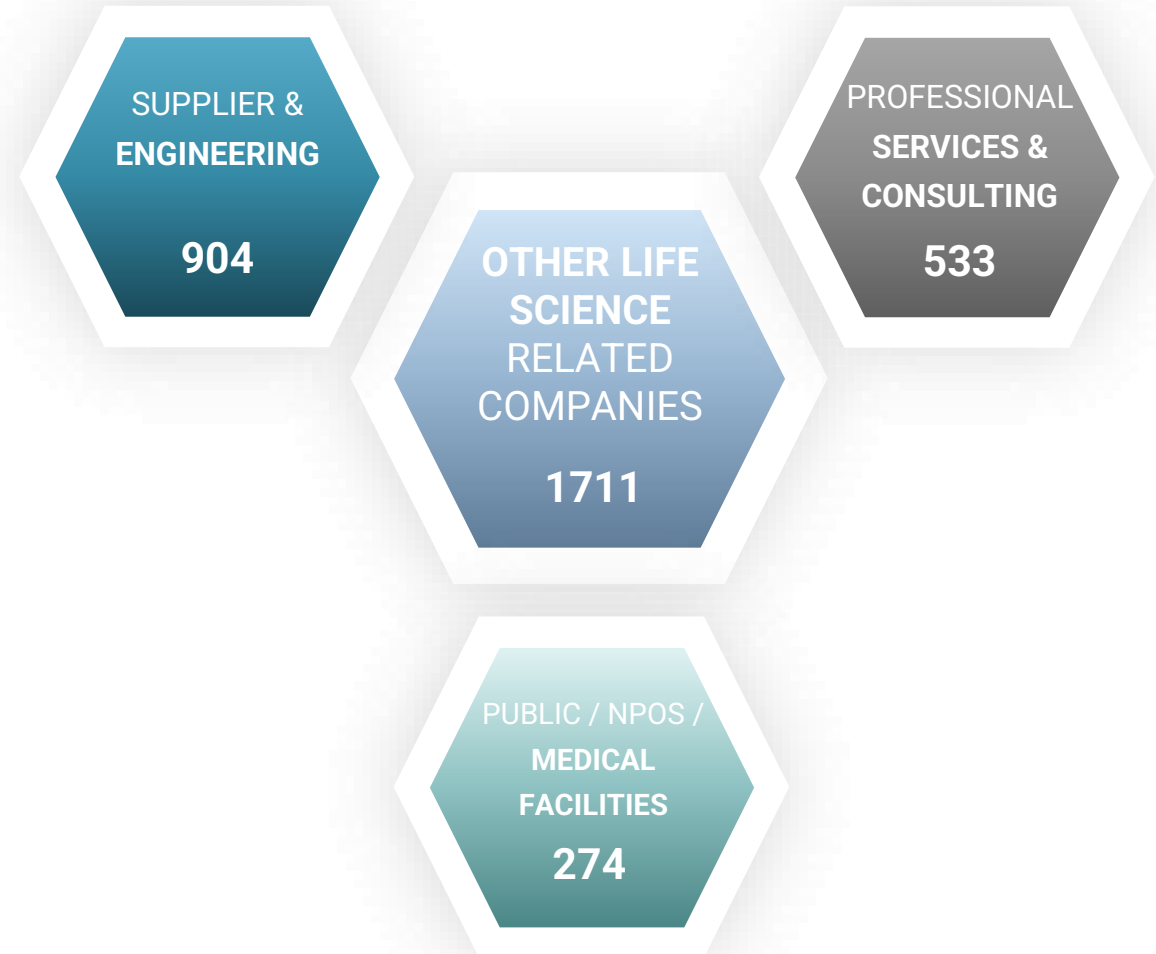
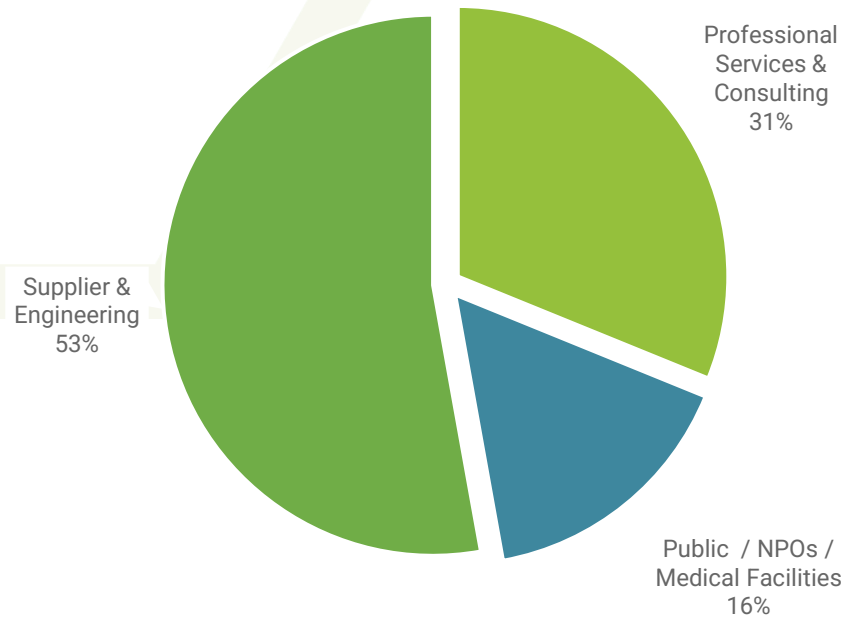
# OVERVIEW OF BIOTECH COMPANIES

## NUMBER OF COMPANIES BY SECTOR



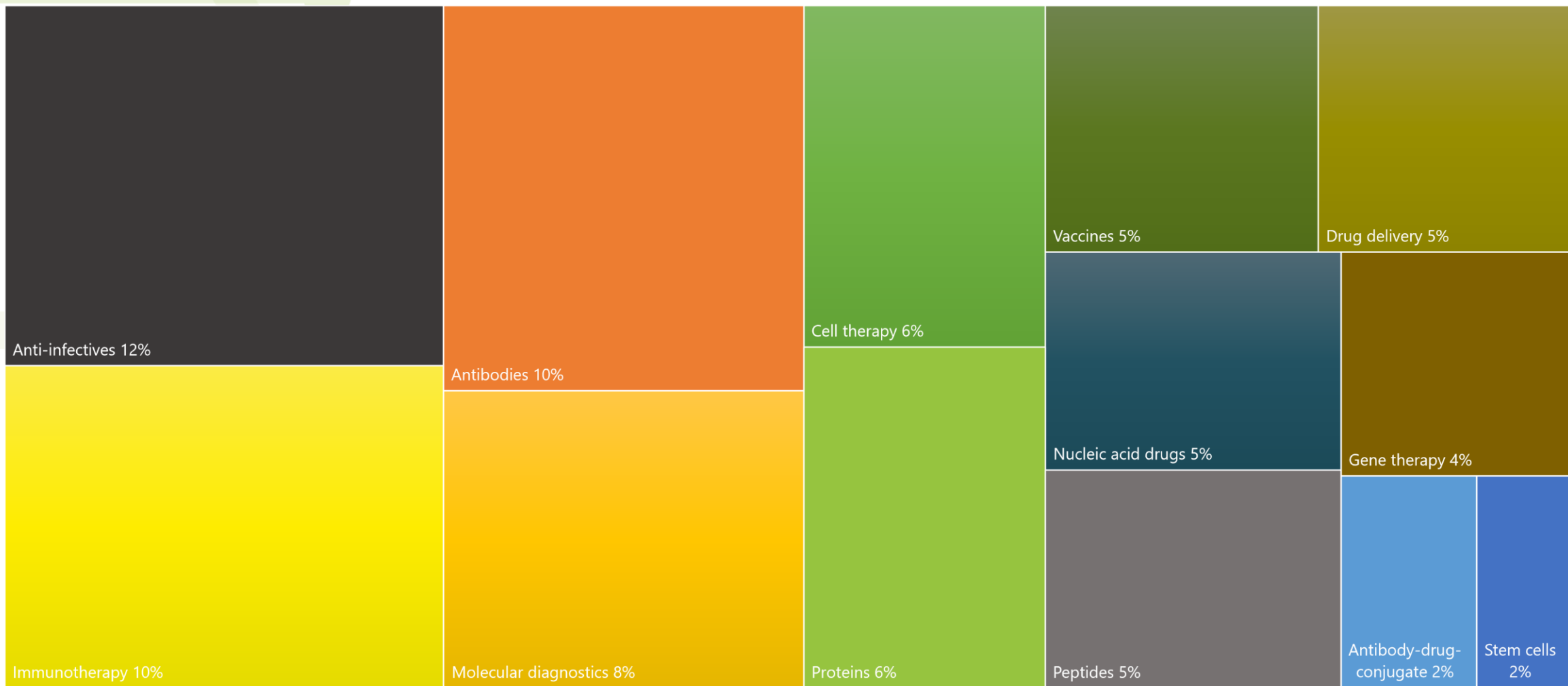
# OVERVIEW OF OTHER LIFE SCIENCE RELATED COMPANIES

## NUMBER OF COMPANIES BY OTHER LIFE SCIENCE RELATED SECTORS



# BIOTECH - THERAPEUTICS COMPANIES BY KEY ACTIVITIES

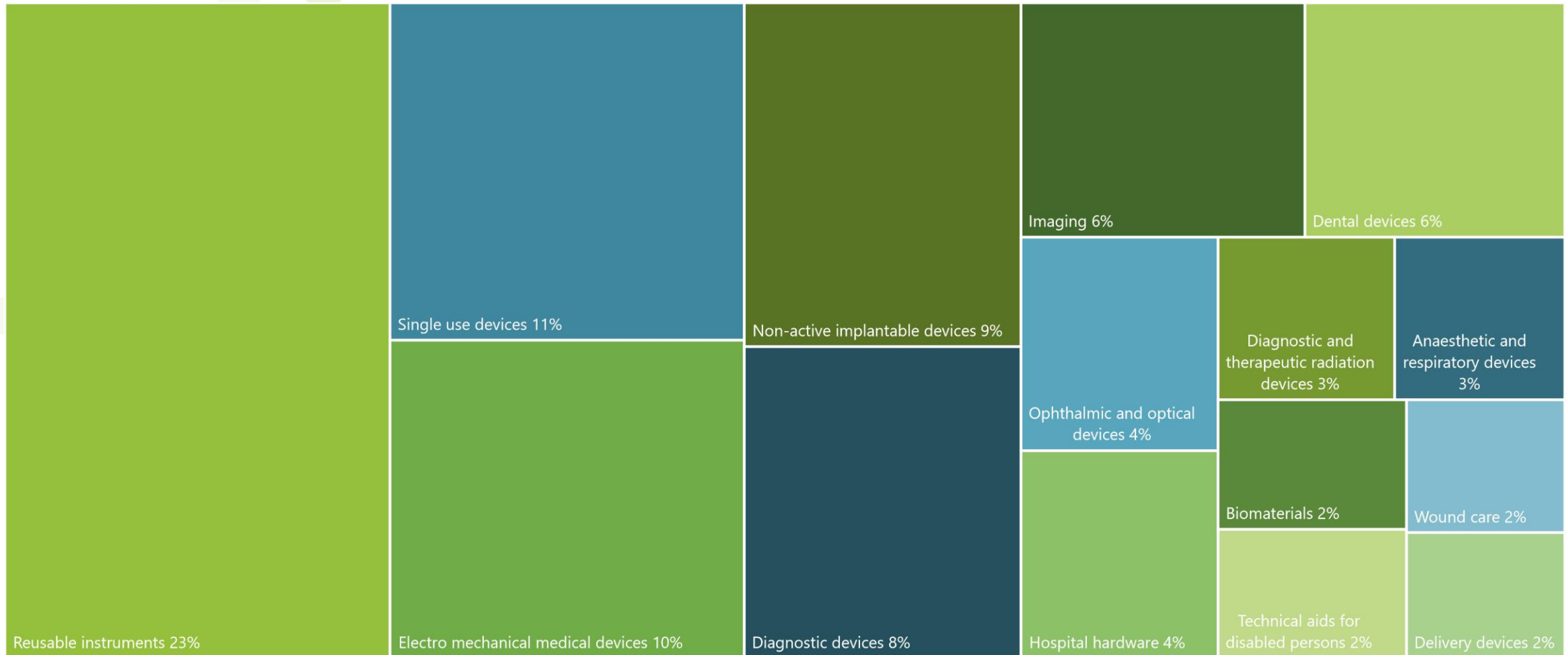
AS PERCENTAGE OF TOTAL NUMBER OF BIOTECH - THERAPEUTICS COMPANIES



For **269** Biotech Therapeutics companies there were **486** subsectors (key activity areas) assigned (one biotech company can be active in multiple areas). The graph displays Biotech – Therapeutics and Diagnostics subsectors as the percentage of the total number of Biotech – Therapeutics and Diagnostics subsectors with exclusion of the category Others. The company subsectors are regarded as the key activities of a company. For the definition of subsectors please visit [www.biotechgate.com/web/cms/index.php/covered\\_industry\\_sectors.html](http://www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html). Information displayed may alter as new information is received continuously.

# MEDICAL TECHNOLOGY COMPANIES BY KEY ACTIVITIES

AS PERCENTAGE OF TOTAL NUMBER OF MEDICAL TECHNOLOGY COMPANIES

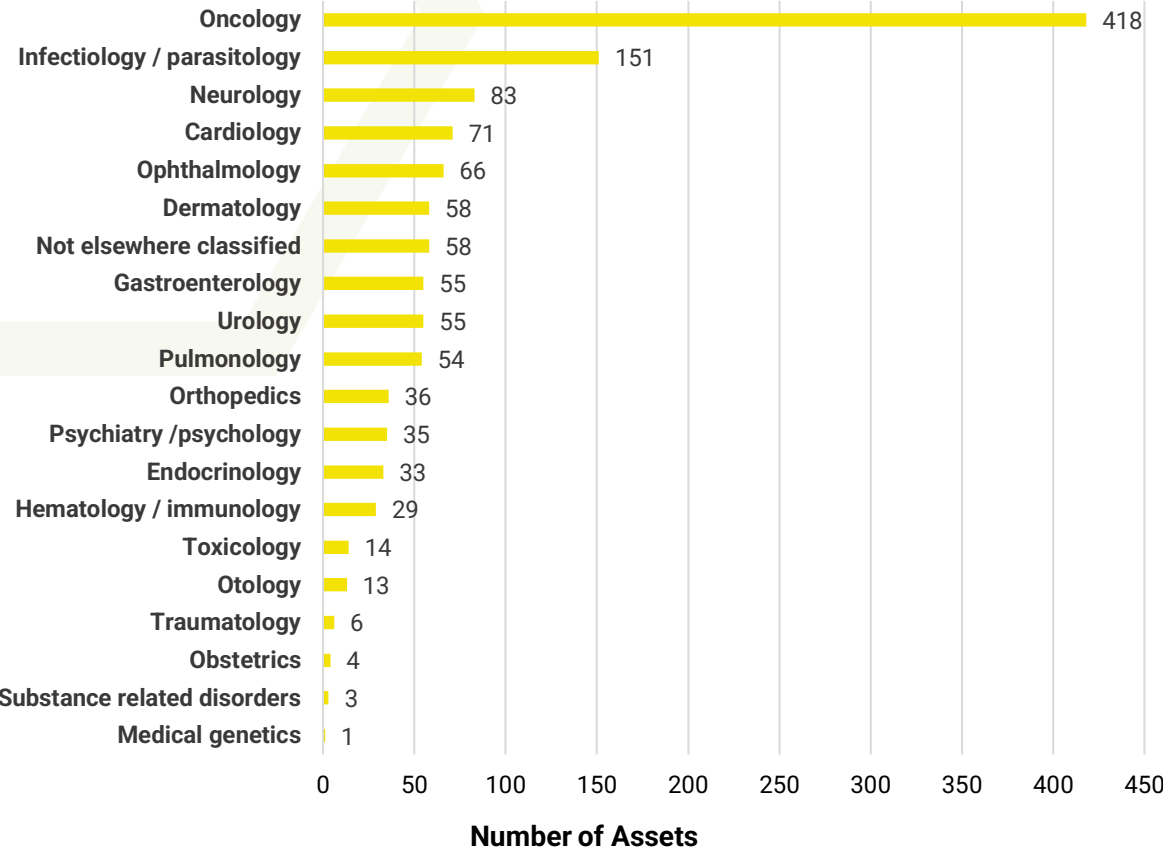


For **554** Medical Technology companies there were **1191** subsectors (key activity areas) assigned (one medtech company can be active in multiple areas). The graph displays Medical Technology subsectors as the percentage of the total number of Medical Technology subsectors with exclusion of categories with percentages lower than 3% and Others. The company subsectors are regarded as the key activities of a company. For the definition of subsectors please visit [www.biotechgate.com/web/cms/index.php/covered\\_industry\\_sectors.html](http://www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html). Information displayed may alter as new information is received continuously.

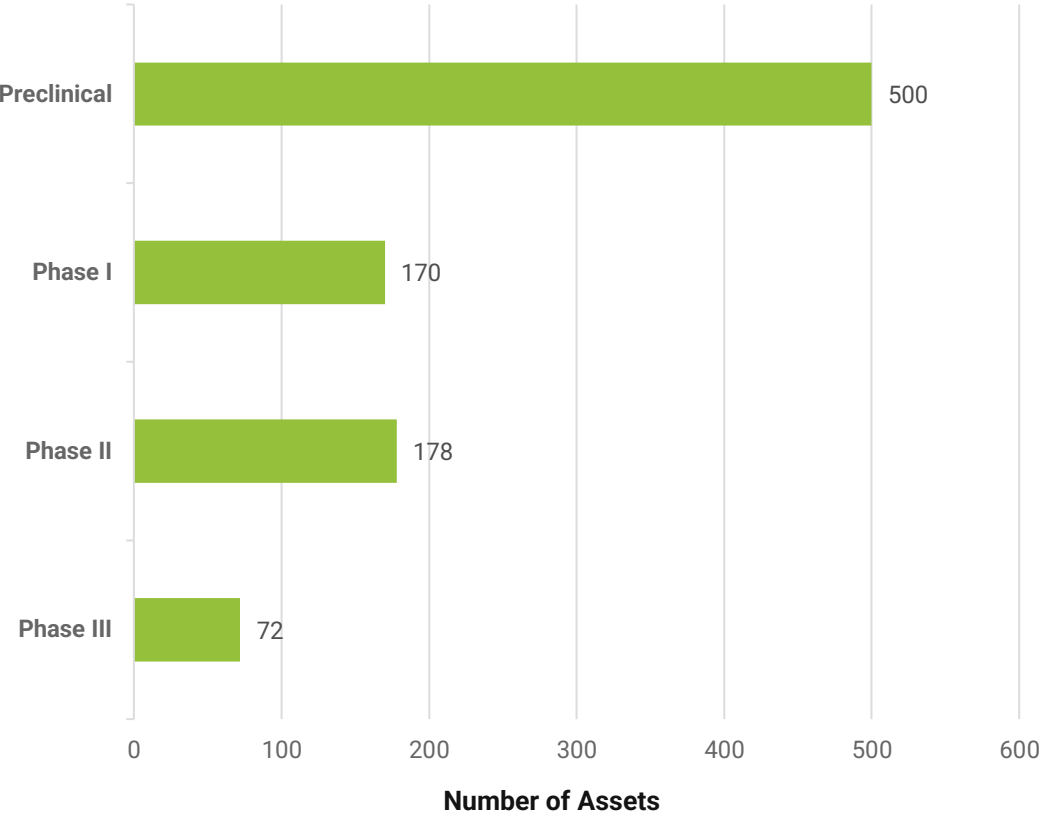
# BIOTECH ASSETS IN CLINICAL DEVELOPMENT

BY INDICATION AND DEVELOPMENT PHASE

## BREAKDOWN BY INDICATION



## BREAKDOWN BY DEVELOPMENT PHASE



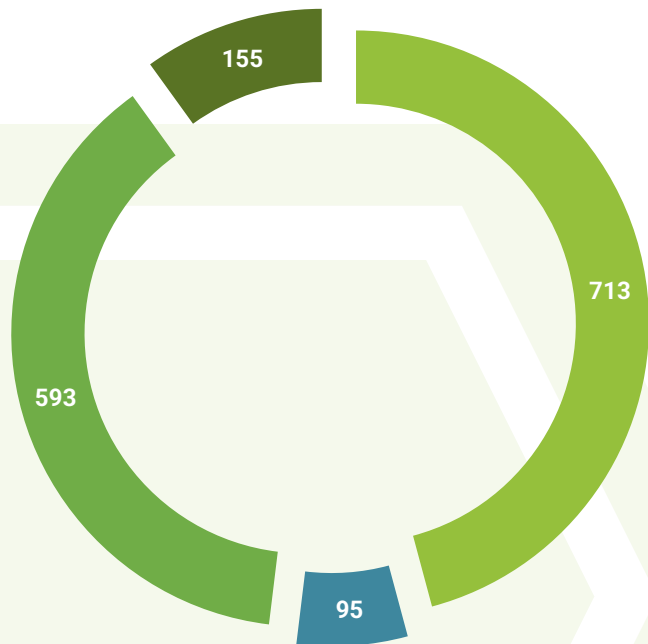
Both graphs contain the number of assets of Biotech – Therapeutics and Diagnostics companies (excl. of Pharma or Biotech – Others or Biotech R&D Services companies). Products in Discovery and Lead Optimization Phase are merged into Preclinical; Development Phase I/II trials are merged into Phase II and Phase II/III trials are merged into Phase III category. Information displayed in the chart may alter as new information is received continuously



# ASSETS AVAILABLE FOR OUT-LICENSING

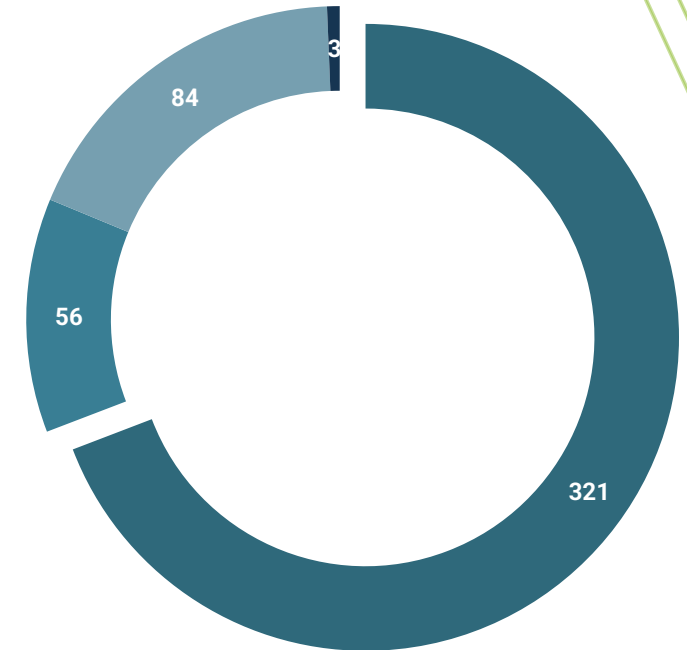
## NUMBER OF ASSETS

### BY ASSET CLASS



■ Therapeutics ■ Diagnostics ■ Medical Devices ■ Technologies

### THERAPEUTICS IN DEVELOPMENT BY DEVELOPMENT PHASE

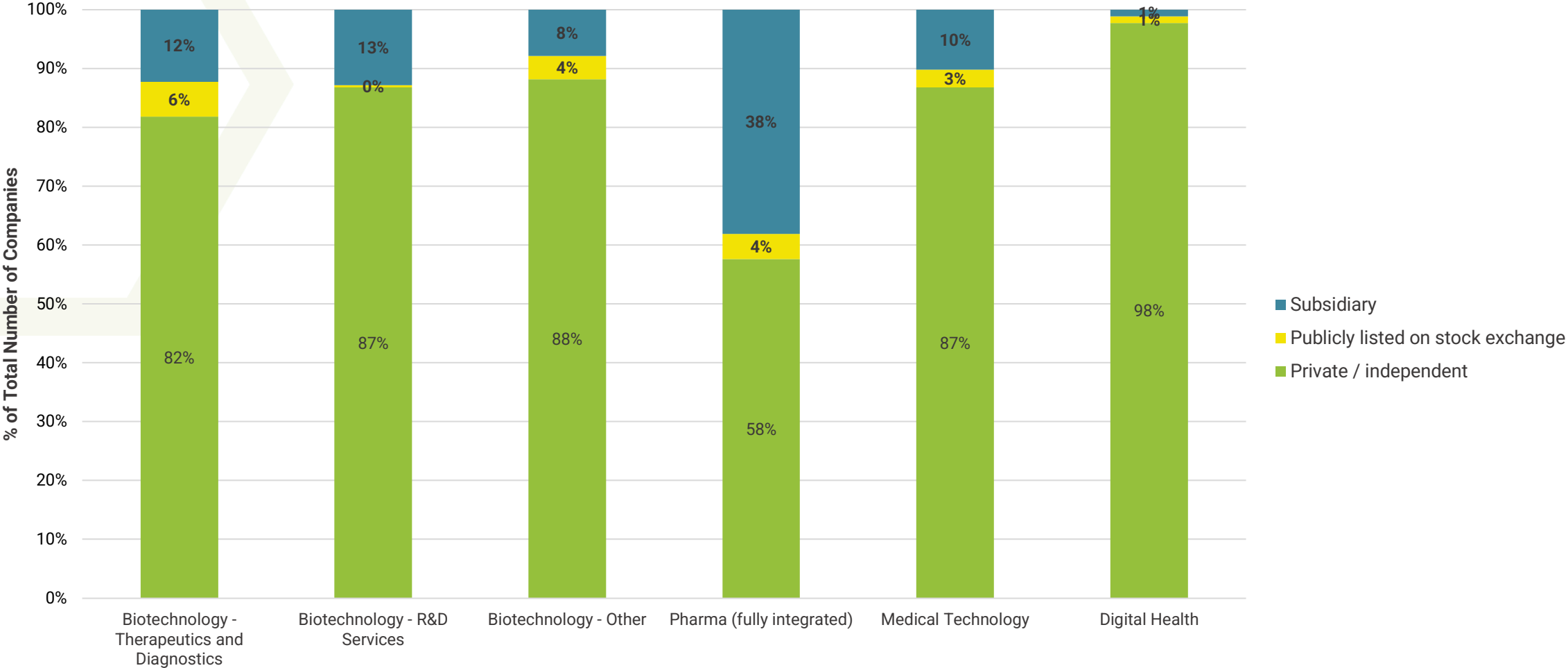


■ Preclinical ■ Phase I ■ Phase II ■ Phase III

The graph titled Therapeutics in Development by Development Phase displays a subset of the asset class Therapeutics. Products in Discovery and Lead Optimization Phase are merged into Preclinical; Development Phase I/II trials are merged into Phase II and Phase II/III trials are merged into Phase III category.

# OVERVIEW OF OWNERSHIP

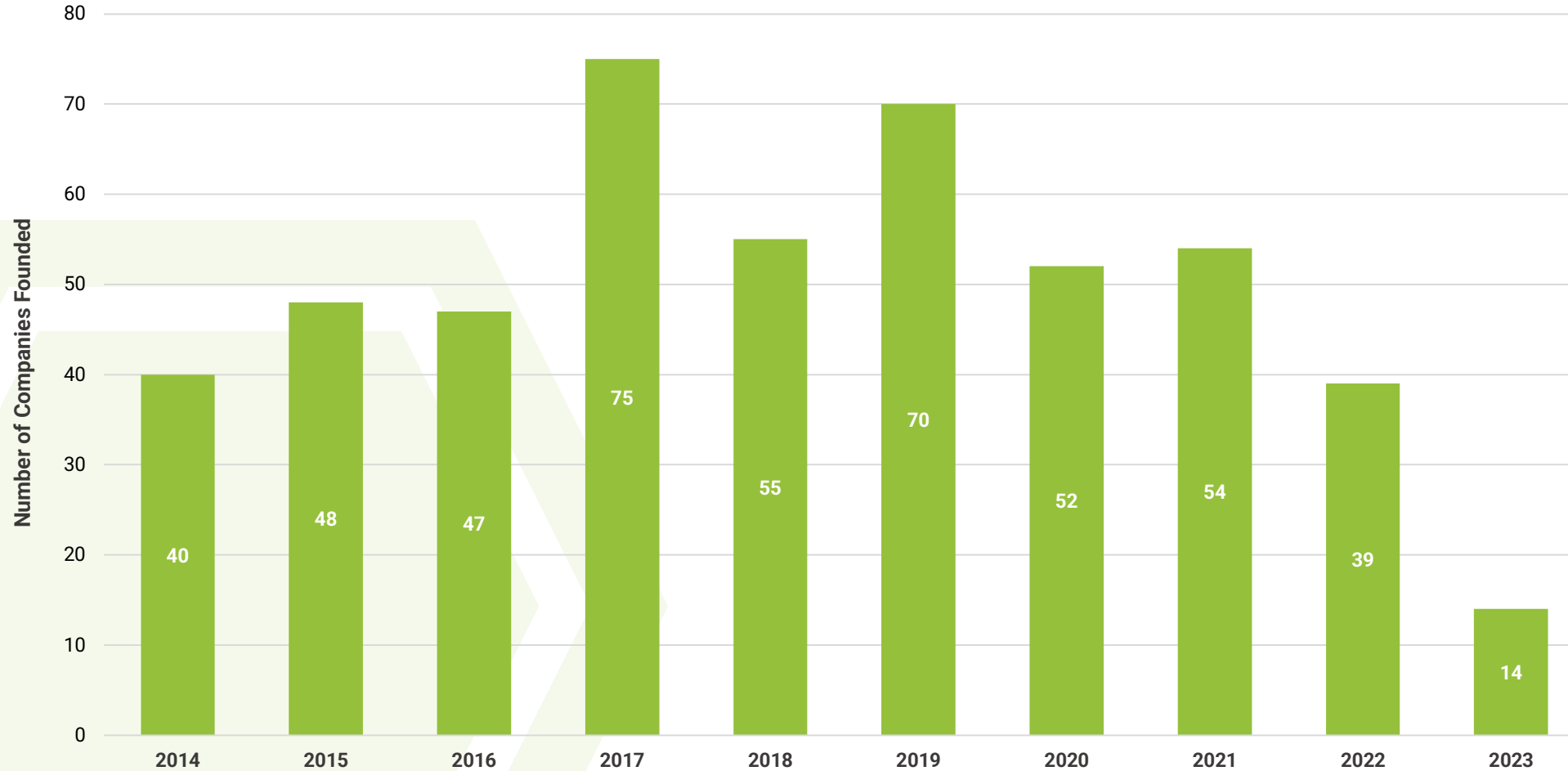
## PERCENTAGE OF TOTAL NUMBER OF COMPANIES BY OWNERSHIP AND SECTOR



For the definition of categories please visit [www.biotechgate.com/web/cms/index.php/covered\\_industry\\_sectors.html](http://www.biotechgate.com/web/cms/index.php/covered_industry_sectors.html). Percentage value is expressed as % of total number of companies in the sector. Information displayed may alter as new information is received continuously.

# COMPANY FOUNDATION TIMELINE

NUMBER OF LIFE SCIENCE COMPANIES FOUNDED BY YEAR | 2013-2022

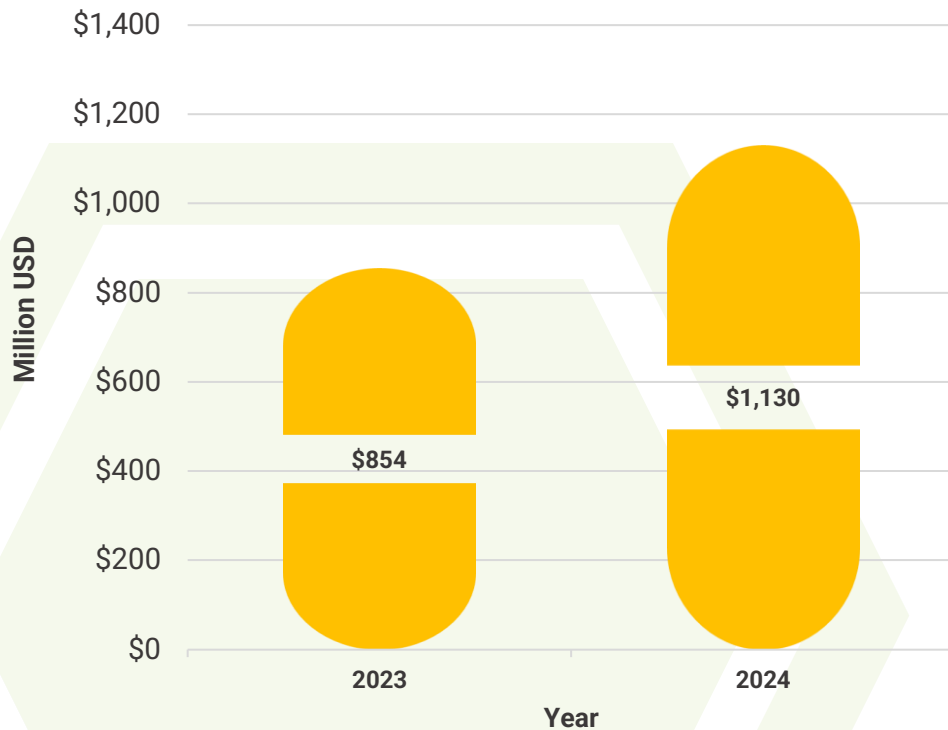


The graph contains the number of privately owned or publicly listed (no subsidiaries) life science companies founded by year including Biotech - Therapeutic and Diagnostic, Biotech - R&D Services, Biotech - Others, Pharma, Medical Technology and Digital Health companies. **Companies founded in 2024 were excluded** since newly founded companies often remain under the radar until their first financing round. Information displayed in the chart may alter as new information is received continuously.

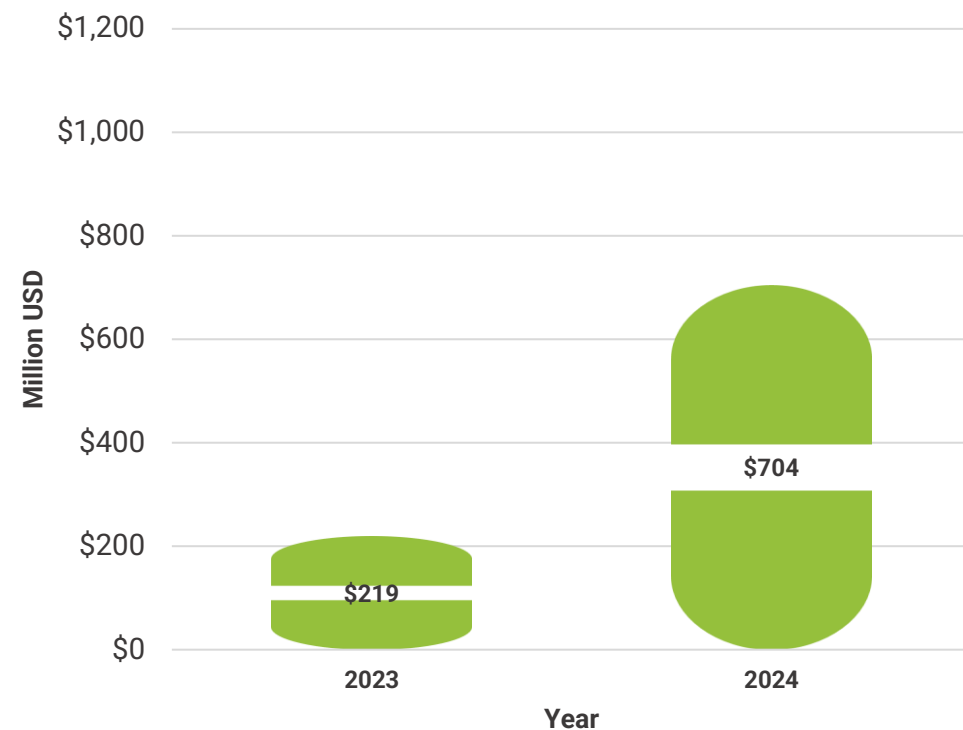
# VENTURE FINANCING OF LIFE SCIENCE COMPANIES

## PRIVATE EQUITY ROUNDS | 2022-2023

### LIFE SCIENCE COMPANIES



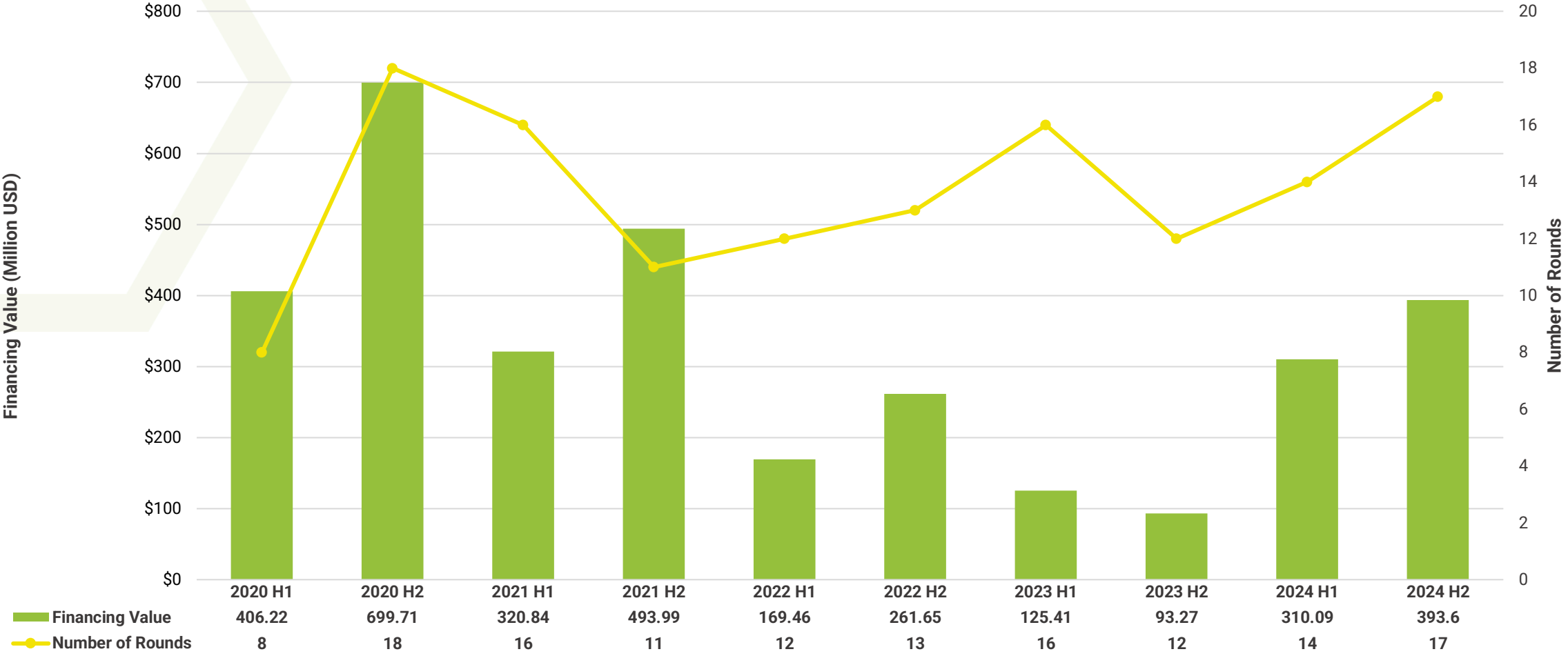
### BIOTECH COMPANIES



Life Science companies include Biotech - Therapeutics and Diagnostics, Biotech - R&D Services, Biotech - Others, Pharma, Medical Technology and Digital Health companies. Biotech companies are a subset of Life Science companies and include: Biotech - Therapeutics and Diagnostics, Biotech - R&D Services, Biotech - Others. Financing data only includes private equity rounds (excl. private placements in public companies). Data may alter as new information is continuously received and/or new tranches to existing financing rounds are added.

# BIOTECH VENTURE FINANCING






## PRIVATE EQUITY ROUNDS – 5 YEAR REPORT



Biotech companies are a subset of Life Science companies and include: Biotech - Therapeutic and Diagnostic, Biotech - R&D Services, Biotech - Others. Financing data only includes private equity rounds (excl. private placements in public companies) of biotech companies (incl. therapeutic and diagnostic, R&D services and others). Data may alter as new information is continuously received and/or new tranches to existing financing rounds are added.

# MAJOR BIOTECH VENTURE FINANCING ROUNDS (2024)

## TOP 5 PRIVATE EQUITY FINANCING ROUNDS | 2023

Company	Sector	Type of Round	USD M
ITM Isotope Technologies Munich SE 	Pharma (fully integrated)	Other / unknown	\$205
CatalYm GmbH 	Biotechnology - Therapeutics and Diagnostics	Series D / 4. Round	\$150
Tubulis GmbH 	Biotechnology - Therapeutics and Diagnostics	Series B / 2. Round	\$139
SciRhom GmbH 	Biotechnology - Therapeutics and Diagnostics	Series A / 1. Round	\$68
Formo Bio GmbH 	Biotechnology - Other	Series B / 2. Round	\$61

The table shows the five biggest private equity financing rounds (excl. IPOs, research grants, loans) of private and independent biotech companies in 2024. Information displayed in the table may alter as new information is continuously received and/or new tranches to existing financing rounds are added.

# ABOUT BIOTECHGATE



**Biotechgate** is a leading **business development and licensing database** for the entire life science industry, offering a wealth of information on over 64,000 life science company profiles. Thanks to its unique data-sourcing process, the profiles include company descriptions, contact information, product pipeline information, financing rounds, and management details, making it an invaluable resource for big pharma, start-ups, investors, and other industry professionals. Biotechgate also features over 40,000 **licensing deals** and a **clinical trials database** containing over 970,000 records from registries around the world.

To register for a free demo or to learn more about the different subscription options, please visit [Biotechgate](https://www.biotechgate.com).

# OUR PARTNERS



BioRN is the science and industry innovation cluster of the Rhine-Neckar region around Heidelberg, one of Germany's strongest biotech and life-science hubs in Germany. It is a non-profit network fostering health innovations and serving its members by creating a rich translational ecosystem as well as promoting, representing and connecting the regional innovation stakeholders. BioRN has more than 160 institutional members, including the top academic and research institutions, 10 global pharmaceutical companies, a large range of small and medium-sized enterprises bolstering the life science ecosystem as well as local government organizations and representations of interests. With the vision "create innovation ..foster translation", BioRN have developed a clear strategy to become the leading life science cluster and to attract global investments and talent. BioRN is also the founding partner of BioLabs Heidelberg, a leading shared laboratory space for life science and biotech startups, part of the global BioLabs network.

Biotechgate/Venture Valuation provide the [Guide to the Region Rhine-Main-Neckar](#) available at the BioRN website.



# OUR PARTNERS



As the sector association of the biotechnology industry with more than 370 corporate members, [BIO Deutschland](#) has set itself the objective of supporting and promoting the development of an innovative economic sector based on modern biosciences. BIO Deutschland is Germany's biotechnology sector representative at the BDI, the Federation of German Industries, and at the European association, EuropaBio, in Brussels. BIO Deutschland also works closely with other biotech organisations in Europe and the USA in order to lobby for the interests of the sector in an internationally coordinated way.

Venture Valuation/Biotechgate provides the [online directory](#) of BIO Deutschland member companies.

# OUR PARTNERS



BIO.NRW the official network for Biotechnology and Life Science in North Rhine-Westphalia (NRW), Germany's largest and economically most powerful federal state. Since 2008, BIO.NRW acts on behalf of the State Government of NRW and the office is run by the Juelich Research Center. Covering all fields of biotechnology, the network is a catalyst for the sustainable development of NRW's strengths in biotechnology and the bioeconomy. BIO.NRW stimulates cooperation between companies, research institutes, and the state sector along value-added chains– hereby setting a focus on the support of start-ups and SMEs with regard to financing, internationalization and access to public funding, i.e. project consortia.

Thanks to the partnership with Venture Valuation, BIO.NRW provides free database of clear and comprehensive information about life science and biotechnology companies from North Rhine-Westphalia. The information includes company profiles, contact details and a summary of products, services and technologies.

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HEALTH MADE IN GERMANY is the export initiative for the German healthcare industry implemented by Germany Trade & Invest, the economic development agency of the Federal Republic of Germany, on behalf of the German Federal Ministry for Economic Affairs and Climate Action (BMWK).

HEALTH MADE IN GERMANY partnered with Venture Valuation/Biotechgate to create an online company directory that gives free access to 3500 profiles of companies active in the German healthcare market. The individual company profiles provide detailed information about each company's activities, product and services range, financial data and contact information. This allows companies to establish direct contact with potential partners in Germany.

# TERMS OF USE

The Life Sciences Trend Analysis is based on data entered in the Biotechgate Database available at [www.biotechgate.com](http://www.biotechgate.com). The statistics and graphs in this presentation are based on figures and information entered in this database and we do not guarantee any accuracy hereof.

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