

行业资讯追踪

2022 年 10 月

一、医药公司.....	2
Pfizer-临床、并购.....	2
AstraZeneca-并购.....	2
Amgen-产能建设.....	2
Merck KGaA -交易.....	3
Gilead-并购.....	3
二、行业资讯.....	3
（一）融资并购.....	3
（二）其他.....	10

一、医药公司

Pfizer-临床、并购

1、[10月5日，辉瑞宣布其PARP抑制剂Talzenna与Xtandi构成的组合疗法在TALAPRO-2临床3期数据，其在治疗前列腺癌方面显示了强大的疗效，并且安全性可控。](#)目前几项正在进行的前列腺癌临床试验还在对TALZENNA进行评估，另外多项试验正在评估TALZENNA与其他靶向疗法联合在各种实体瘤治疗中的效果。

2、10月3日和5日，辉瑞分别宣布以116亿美元收购Biohaven公司，以54亿美元收购GBT公司。

-[Biohaven](#)是一家总部位于康涅狄格州纽黑文的神经系统疾病药品开发公司，收购完成后，辉瑞将获得偏头痛CGRP资产包括Rimegepant、Zavegepant和5个临床前项目。NurtecODT(rimegepant)在2022年第一季度的净营收达到1.236亿美元。这次收购是2022年全球最大的医药并购案之一。在收购完成前，Biohaven完成了BioHave Ltd.的分拆，BioHave是一家保留Biohaven非CGRP开发阶段管线化合物的新公司，持有Kv7离子通道激活剂、谷氨酸调节和肌肉生长抑制素抑制平台、临床前候选产品以及某些不包括在辉瑞收购范围内的公司基础设施资产。

-[GBT](#)是一家总部位于加利福尼亚州旧金山的血液治疗公司，成立于2011年，主攻镰状细胞病的治疗药物研发。2019年，GBT的镰状细胞病治疗药物Oxbryta在美国获批，另还有两款药物处于3-4期的临床。辉瑞这次收购将加强它在罕见病领域的业务。GBT的主要管道资产是III期开发中的inclacumab，用于解决与镰状细胞病相关的疼痛危机，以及II期的镰状血红蛋白聚合抑制剂GBT021601。这两种产品都获得了美国食品和药物管理局的孤儿药和罕见儿科疾病的称号。

AstraZeneca-并购

[10月3日，阿斯利康旗下专注于罕见病领域的Alexion将通过子公司向LogicBio发起现金收购要约。](#)两家董事会一致批准了该交易。Alexion计划在四到六周内完成交易。

Amgen-产能建设

[10月6日, Amgen 宣布在旧金山牡蛎角开设一个新的研发实验室](#), 占地 245, 000 平方英尺, 是公司第二大研发设施, 专注于为癌症、炎症性疾病和心脏代谢紊乱患者发现治疗方法, 内部将设置 24 个部门共 650 名员工。

Merck KGaA -交易

[9月21日, Merck KGaA 宣布与 Nerviano 就下一代高选择性和脑渗透性 PARP1 \(聚\(ADP-核糖\)聚合酶\)抑制剂 NMS-293 的达成合作协议, 预付 6500 万美元](#)。NMS-293 正处于 I 期临床开发阶段, 用于治疗 BRCA 突变肿瘤患者作为单一药物并与替莫唑胺联合治疗复发性胶质母细胞瘤。

Gilead-并购

[9月20日, 吉利德宣布以 4.05 亿美元的现金收购总部位于英国的 MiroBio](#), 该公司专注于通过针对免疫抑制受体的激动剂恢复免疫平衡。MiroBio 的主要研究性抗体 MB272 是免疫抑制受体 B 淋巴细胞衰减剂 (BTLA) 的选择性激动剂, 已进入 1 期临床试验, 首例患者于 2022 年 8 月初给药。MB272 靶向 T, B 和树突状细胞以抑制或钝化活化并抑制炎症免疫反应。

二、行业资讯

(一) 融资并购

10 月全球生物医药融资事件

公司名称	类型	地区	当前轮次	融资时间	最新融资金额	投资方
君合盟	创新生物技术药物开发商	中国-浙江	A 轮	2022/10/8	¥2 亿	光点资本、红什资本、中合欧普医疗
纽欧申医药	药物研发商	中国-上海	PreA 轮	2022/9/29	\$2000 万	龙磐资本
桦冠生物	药学研发服务提供商	中国-北京	B 轮	2022/9/27	RMB¥1 亿	中关村科学城公司、盛美嘉乐、

						重庆桦泽锦灵、荷塘创投
浩博医药	生物疫苗、核酸药研发商	中国-浙江	PreA 轮	2022/10/12	\$1600 万	InnoPinnacle Fund
再极医药	临床研究、小分子、物发现、 肿瘤免疫	中国-广东	C+轮	2022/10/18	亿元人民币	中鑫创新投资、龙磐投资、德屹 资本
标新生物	蛋白降解新药研发商	中国-上海	未公开	2022/9/27	--	磐谷创投
君合盟	创新生物技术药物开发商	中国-浙江	未公开	2022/9/28	--	中合欧普医疗
特科罗生物	小分子、药物发现	中国-浙江	战略投资	2022/10/11	--	成都生物城
蹟灵生物	自身免疫、小分子、药物发 现、大学衍生企业	中国-四川	转入	2022/10/15	--	裕禧投资
Nested Therapeutics	Nested Therapeutics aims to advance precision oncology medicine by finding new driver mutations.	Greater Boston Area, East Coast, New England	Series A	2022/10	\$90 M	Goldman Sachs Asset Management, Section 32, Foresite Capital, Versant Ventures, Avidity Partners
Enliven Therapeutics	Enliven Therapeutics is a precision oncology company developing small molecule therapies to extend and improve patient lives.	Greater Denver Area, Western US	Venture Series - Unknown	2022/10	\$165 M	Sheatree Capital, OrbiMed, Fidelity Management and Research Company, RA Capital Management, Logos Capital
AQEMIA	Drug discovery - Pharma 3.0	European Union (EU)	Series A	2022/10	\$29.6M	Eurazeo, Bpifrance, Elaia
Dice Therapeutics	Dice Therapeutics develops a transformative platform designed for the discovery of novel small molecules.	San Francisco Bay Area, West Coast,	Post-IPO Equity	2022/10	\$345 M	RA Capital Management, Alexandria Venture Investments, Logos Capital, Deep Track Capital, Northpond

		Western US				Ventures
Orionis Biosciences	Orionis Biosciences operates in the healthcare industry focusing on biotechnology business & innovation.	Greater Boston Area, East Coast, New England	Series C	2022/10	\$55 M	Novartis, Cormorant Asset Management, V-Bio Ventures, Excel Venture Management, Solasta Ventures
Matchpoint Therapeutics	Matchpoint Therapeutics is a biotechnology company that integrates chemoproteomics, ML, and covalent chemistry to treat serious illnesses.	Greater Boston Area, East Coast, New England	Series A	2022/10	\$70 M	Alexandria Venture Investments, Atlas Venture, Access Biotechnology, Digitalis Ventures, Sanofi Ventures
Tavros Therapeutics	Tavros Therapeutics is an emerging biotechnology company that discovers and develops therapies for cancer.	Research Triangle, East Coast, Southern US	Corporate Round	2022/10	\$17.5 M	Alexandria Venture Investments, Vividion Therapeutics, KdT Ventures, Piedmont Capital Investments
Amylyx Pharmaceuticals	Amylyx Pharmaceuticals specializes in providing solutions for Alzheimer 鈥愰 and other diseases of the brain.	Greater Boston Area, East Coast, New England	Post-IPO Equity	2022/10	\$246.3 M	Viking Global Investors, Alpha Wave Global, Lysosomal Therapeutics, Perceptive Advisors, Bain Capital Life Sciences
Evolva	Evolva is a biotech company that develops and commercializes ready-to-formulate and nature-based		Grant	2022/10	\$0.54 M	Wellington Partners, Swisscom Ventures, Novartis Venture Fund, BioMedPartners, Centers for Disease Control and

	ingredients.					Prevention
Hemispherian	Hemispherian is a biotechnology firm that formulates new treatments for all kinds of cancer.	Nordic Countries, Scandinavia	Venture Series Unknown	2022/10	\$7.4 M	European Innovation Council, Investinor, BIF Partners, PAACS Invest AS, Meneldor
Biohaven Pharmaceutical	Biohaven is a biopharmaceutical company that develops drug candidates targeting neurological diseases.	East Coast, New England, Northeastern US	Post-IPO Equity	2022/10	\$301.9 M	RA Capital Management, Vivo Capital, Venrock, Soros Fund Management, Rock Springs Capital
BerGenBio	BerGenBio is clinical-stage biopharma developing first-in-class selective AXL kinase inhibitors to treat multiple aggressive cancers.	Nordic Countries, Scandinavia	Post-IPO Debt	2022/10	\$9.5 M	Investinor, Sarsia Seed Management, Birk Venture, Meteva AS
Immunic Therapeutics	Immunic is a biopharmaceutical company that develops a pipeline of selective oral immunology therapies.	Greater New York Area, East Coast, Northeastern US	Post-IPO Equity	2022/10	\$60 M	High-Tech Grunderfonds, Invus, BVF Partners, Adage Capital Management, Logos Capital
Hexagon Bio	Hexagon Bio is a data-driven biotech company developing targeted small molecule therapeutics.	San Francisco Bay Area, Silicon Valley,	Venture Series Unknown	2022/10	\$67.3M	8VC, Two Sigma Ventures, SoftBank Vision Fund, LeFrak, The Column Group

		West Coast				
Verona Pharma	Verona Pharma is a biotechnology company dedicated to discovering new drugs for the treatment of chronic respiratory diseases.		Post-IPO Debt	2022/10	\$150 M	OrbiMed, RA Capital Management, Silicon Valley Bank, Foresite Capital, Vivo Capital
HMNC Brain Health	HMNC Brain Health is a precision medicine pioneer in psychiatry based in Munich.	European Union (EU)	Venture Series - Unknown	2022/10	\$14.3 M	Wilhelm Beier, Toni Kroos, Hans Komperna 雕, Carsten Maschmeyer, Jahr Holding GmbH
PIC Therapeutics	PIC Therapeutics is a biotechnology company focused on transforming the treatment of cancer.	Greater Boston Area, East Coast, New England	Series A	2022/10	\$35 M	OrbiMed, Lumira Ventures, Advent Life Sciences, Harrington Discovery Institute at University Hospitals, Belinda Termeer
Sibylla Biotech	Sibylla Biotech developed small molecule folding interfering degraders (FIDs) that can address a range of therapeutic areas.	European Union (EU)	Series A	2022/10	\$23M	VI Partners, CDP Venture Capital, 3B Future Health Fund, Seroba Life Sciences, Vertis SGR S. p. A.
Empyrean Neuroscience	Empyrean is using genetic engineering to treat severe neuropsychiatric and neurologic illnesses in a	Greater New York Area, East Coast, Northeast	Series A	2022/10	\$22 M	Spore Partners

	way that will revolutionize healthcare.	rn US				
Neumora Therapeutics	Neumora Therapeutics operates as a clinical-stage biotechnology company.	Greater Boston Area, East Coast, New England	Series B	2022/10	\$112 M	ARCH Venture Partners, F-Prime Capital, Amgen, Alexandria Venture Investments, Invus
First Wave BioPharma	First Wave BioPharma aims to become a leader in developing non-systemic, recombinant protein therapies.	Greater New York Area, East Coast, Northeastern US	Post-IPO Equity	2022/10	\$55.3 M	Alexander Capital
Muna Therapeutics	Muna Therapeutics discovers and develops therapies that slow or stop neurodegenerative diseases	European Union (EU), Nordic Countries, Scandinavia	Grant	2022/10	\$4.9 M	Novo Holdings, Sofinnova Partners, Polaris Ventures, Sanofi Ventures, Michael J. Fox Foundation
Actuate Therapeutics	Actuate Therapeutics provides advanced research for the treatment of high-impact cancers and neurodegenerative diseases.	Dallas/Fort Worth Metroplex, Southern US	Venture Series - Unknown	2022/10	\$11.2 M	Tech Coast Angels, Kairos Ventures, DEFTA Partners, Bios Partners
Recursion Pharmaceuticals	Recursion Pharmaceuticals is a digital biology company,	Western US	Post-IPO Equity	2022/10	\$150 M	National Institutes of Health, Advantage Capital,

ls	developing a drug discovery platform and pipeline with machine learning.					University of Minnesota, Menlo Ventures, DCVC
Pacylex	Pacylex Pharmaceuticals develops a precision medicine solution for multiple common cancers.		Grant	2022/10	\$1.4 M	U.S. Department of Defense, VA Angels, Greenfire Bio
Covira Surgical	Covira Surgical engages in the development of drugs that modulate the biological activity of the gut microbiome's resident bacteria.	Greater Chicago Area, Great Lakes, Midwestern US	Debt Financing	2022/10	\$9.1 M	
Treventis	TREVENTIS is dedicated to treating and preventing protein misfolding diseases.	Great Lakes	Grant	2022/10	\$3 M	BioAdvance, Wellcome Trust, Chiefswood Holdings Limited, Congressionally Directed Medical Research Programs, University Health Network
NLS Pharma	NLS Pharma is a clinical-stage drug development company focusing on neurobehavioral and neurocognitive disorders and their pharmacognosia.		Post-IPO Equity	2022/10	\$4 M	Yorkville Advisors
Kane Biotech	Kane Biotech is a		Grant	2022/10	\$0.425 M	U.S. Department of Defense,

	biotechnology company that engages in the research and development of products to prevent and disperse biofilms.					Government of Canada, National Research Council of Canada Industrial Research Assistance Program, Manitoba, Western Economic Diversification Canada
Atelerix Life Sciences	Atelerix Life Sciences is a biotechnology company developing cutting-edge proprietary small molecules for the process of addiction.	East Coast, Southern US	Seed	2022/10	\$0.65 M	
Adapsyn Bioscience	Adapsyn is developing a bioinformatics platform devoted to discovering previously unidentified natural product drug candidates.	Great Lakes	Grant	2022/10	\$0 M	Bill & Melinda Gates Foundation, Genesys Capital, Pfizer R&D Innovate
AVEO Oncology	AVEO is a biopharmaceutical company that offers drug development strategies for targeted cancer therapeutics.	Greater Boston Area, East Coast, New England	Post-IPO		\$55 M	

(二) 其他

1、GSK 要求供应商从 2023 年起符合可持续性

[9 月 20 日, GSK 更新了公司的环境目标](#), 主要包含在英国和美国的主要生产基地投资 5000 万英镑用于可再生能源和碳减排、减少救援计量吸入器的温室气体排放 (该吸入器占葛兰素史克碳排放量的 45%)。同时, GSK 加入“零排放”竞争, 即到 2050 年, 收入前 20% 的企业实现净零碳排放。

2、【小核酸药物】赫吉亚生物申报第 2 款创新药

[9 月 30 日, 厦门甘宝利生物 Kylo-0603 胶囊的临床试验申请获得 NMPA 受理, 其结构为 GalNAc 偶联 THR \$\beta\$ 激动剂](#)。根据工商注册信息, 厦门甘宝利生物为赫吉亚生物的全资子公司。9 月 20 日, 赫吉亚与复星医药旗下星曜坤泽合作开发的乙肝 GalNAc-siRNA 新药 HT-101 已经获得临床默示许可。

3、本地化是制药供应链弹性的答案吗?

[安永最近发布的一篇报告中指出, COVID-19 带来的供应链断裂问题逐渐引起了各国政府的重视, 并且各政府认为供应链本地化将有效解决该问题](#)。但是安永生命科学合伙人 Olaf Zweig 认为制药业的供应链是非常复杂的, 且本地化所涉及的制造步骤有很大的差异, 如一家制药公司可以相对容易地对二次包装进行本地化, 但制造过程的早期阶段复杂性大, 对复杂原材料、熟练劳动力和更高资本支出的需求增加, 因此本地化 API 制造将是最具挑战性的。安永战略与交易总监 Derron Stark 认为根据产品类型 (小分子与生物制剂) 的不同, 本地化供应的能力以及整体供应链战略各不相同。小分子特别是 API 更有可能是集中的, 不太可能从目前的供应源转移到二级或局部的供应源, 而生物制剂更有可能使用本地化策略。报告中也提到了可实行的几种方案, 如将订单外包给本地的 CDMO 公司, 建立联合仓储即公司之间共享原材料和消耗品, 共享大型制造设施, 通过开发集成数字平台来提高端到端供应链的可见性, 将使制造商、供应商和批发商的数据链接起来, 从而深入了解实时供应链情况, 并实现更有效的管理和干预等。