\$1.3 BILLION NATIONAL HEALTH AND MEDICAL INDUSTRY GROWTH PLAN

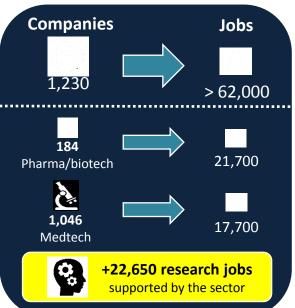
Medical Technology, Biotechnology and Pharmaceutical (MTP) Sector

CURRENT SECTOR

HEALTH is an economic growth opportunity

- 7% of the economy
- 14% of workforce one of the largest sectors
- 20% of Commonwealth expenditure
- Commonwealth policy leverage

MTP SECTOR



- \$4.9b industry GVA (2016, stable)
- **\$1.4b invested in R&D** (2016, stable)
- \$5.2b in exports and growing (2016,)

(10th largest, not directly linked to primary industries)

- Upward trend in exports (up 30% on FY15)
- Reputation for research excellence (27,000 publications in 2016, up 3% from 2015)
- 1,357 clinical trials started in Australia (2015, estimated 65% public funded)
- 242 patents lodged (2016)

GROWTH PLAN

GENOMICS AND PRECISION MEDICINE

Genomics Health Futures Mission (\$500m / 10 years)

NEW TO WORLD INDUSTRIES

Frontier Research

(\$240m / 5 years)*

BioMedTech Horizons

(\$40m / 4 years)

Biomedical Translation Bridge

(\$22.3m / 5 years)*

Targeted Translation Research Accelerator

(\$125m/9 years from 2019/20)*

INDUSTRY COLLABORATION

Industry Researcher Exchange (\$32m / 4 years)*

Increased data linkage and release (\$30m / 4 years ongoing)

Australian Medical Research Advisory

Board (\$20m / 4 years - MRFF and Industry Growth Plan)

CLINICAL TRIALS

Clinical Trials Activity

(\$206m / 5 years)**

International Clinical Trial Collaboration (\$42m/5 years)*

Clinical Trials National Front Door

(preliminary work to develop concept)

- * MRFF committed via MYEFO 2017-18, but not announced.
- ** \$56M announced, with a further \$150M from 2019-20.
- A Estimates based on 'the size of the prize' assumptions in MTPConnect's Sector Competitiveness Plan (2016)
- ^^ Extrapolation of MRFF clinical trial investment to date.
- # Source: Australian Genomics Health Alliance, based on case studies in childhood syndromes.

FUTURE OUTLOOK (2030)

ECONOMIC WEALTH

4x new drug, device and therapeutic industries

• ie, advanced wearables, nanotechnology, point-ofcare diagnostics, and gene and cell therapy

More high value and growing MTP companies

■ 200 new MTP companies, increasingly ASX listed^

Skilled and future-proofed jobs

■ 28,000 new highly skilled MTP jobs, nearly 50% associated with research^

\$18b cumulative additional nominal GVA^

Stronger researcher-industry collaboration

■ At least 300 new industry based medical researchers

Global market leader in clinical trial provision

■ 130 new clinical trials^

Increasing MTP exports

■ 50% increase in exports, new markets established^

HEALTH WEALTH

Lives saved and transformed

Increased survivability and quality of life

Targeted treatments and better use of medicines

Improved diagnosis and avoided health costs

- 5-fold increase in diagnostic rate enabled by genomics#
- greater than 75% drop in diagnostic costs (27k to 6k)#