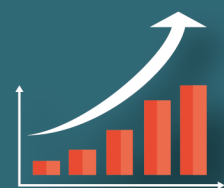
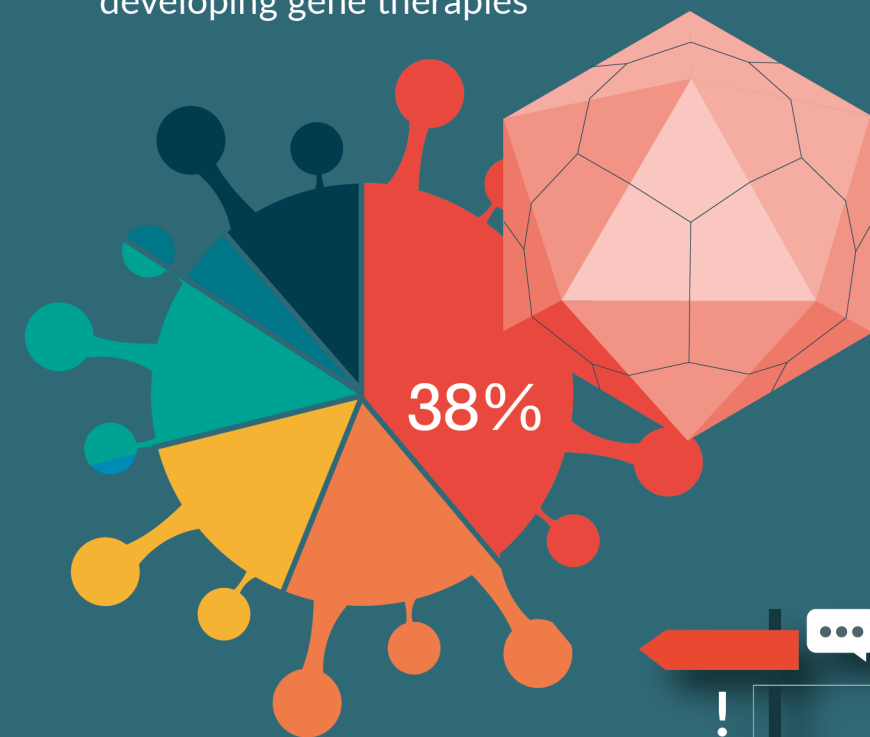


VIRAL VECTORS: PATHWAY TO COMMERCIALIZATION

AAV IS THE PREFERRED VECTOR TYPE for drug developers developing gene therapies



THE DEMAND FOR CLINICAL AND COMMERCIAL VIRAL VECTOR IS INCREASING

Roots analysis, and research & markets predict the gene therapy market as a whole to reach US\$10-11 billion by 2025

\$10-11 BILLION



2025

21
PHASE II

8
PHASE III
(PLANNED)

152
PRECLINICAL

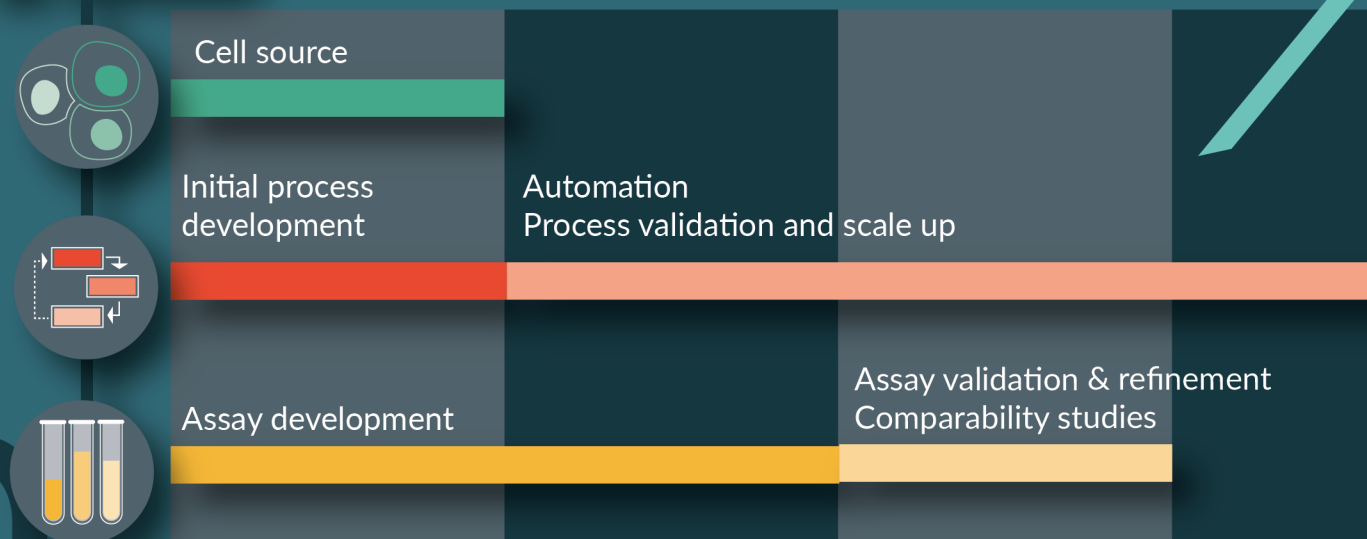
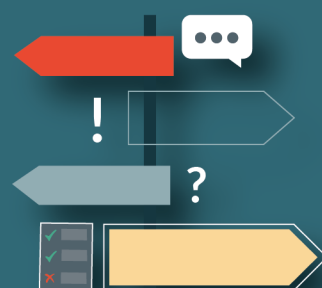
147
PHASE I

48
PHASE I/II

21
PHASE II/III

8
COMMERCIALLY
AVAILABLE
GENE THERAPIES

CRITICAL DECISION MAKING ON ROUTE TO COMMERCIALIZATION



THERE ARE CURRENTLY
307
GENE THERAPY
PRODUCT CANDIDATES