

Grow with Ginkgo

Q1 2026 Update & Business Review

May 7, 2026



Disclaimer

FORWARD-LOOKING STATEMENTS

This presentation, the conference call and webcast contain certain forward-looking statements within the meaning of the federal securities laws, including statements regarding our plans, including with respect to technology adaptations to meet our customers' needs and the integration of our autonomous lab platform with third-party artificial intelligence models, strategies, including with respect to our current expectations, operations and anticipated results of operations, both business and financial, including the timing for attaining Adjusted EBITDA breakeven, potential customer success, including successful application of our offerings by our customers, expected benefits from our strategic partnerships and collaborations (including with named partners such as ProQR and Amazon), the anticipated growth, scaling, capacity, capabilities and competitive position of our autonomous lab (including Nebula) and of our Cloud Lab, Datapoints and Solutions offerings, our beliefs and estimates regarding the size, composition, growth and pace of adoption of the market for autonomous laboratory and related services (including the displacement of manual laboratory work), expectations regarding the development, performance and future enhancements of our platform, and expectations with regard to revenue, including our ability to meet all milestones and achieve the maximum revenue available under certain of our customer arrangements, expenses, our full year 2026 outlook including the total cash burn guidance, and the market environment, all of which are subject to known and unknown risks, uncertainties and other factors that may cause our actual results, performance or achievements, market trends, or industry results to differ materially from those expressed or implied by such forward-looking statements. These forward-looking statements generally are identified by the words "believe," "can," "project," "potential," "expect," "anticipate," "estimate," "intend," "strategy," "future," "opportunity," "plan," "may," "should," "will," "would," "will be," "will continue," "will likely result," "target," "goal," "aim," "design," "forecast," "outlook," "guidance," "seek," "position," and similar expressions, as well as the negatives of such terms. Forward-looking statements are predictions, projections and other statements about future events that are based on current expectations and assumptions and, as a result, are subject to risks and uncertainties. Many factors could cause actual future events to differ materially from the forward-looking statements in this document, including but not limited to: (i) our ability to realize near-term and long-term cost savings associated with our site consolidation plans, including the ability to terminate leases or find sub-lease tenants for unused facilities, (ii) volatility in the price of Ginkgo's securities due to a variety of factors, including changes in the competitive and highly regulated industries in which Ginkgo operates and plans to operate, variations in performance across competitors, and changes in laws and regulations affecting Ginkgo's business, (iii) the ability to implement business plans, forecasts, and other expectations, and to identify and realize additional business opportunities, including with respect to our solutions and tools offerings, (iv) the risk of downturns in demand for products using synthetic biology, (v) the uncertainty regarding the demand for passive monitoring programs and biosecurity services, (vi) changes to the biosecurity industry, including due to advancements in technology, emerging competition and evolution in industry demands, standards and regulations, (vii) the outcome of any pending or potential legal proceedings against Ginkgo, (viii) our ability to realize the expected benefits from and the success of our platform programs and assets, (ix) our ability to successfully develop engineered cells, bioprocesses, data packages or other deliverables, (x) the product development, production or manufacturing success of our customers, (xi) our exposure to the volatility and liquidity risks inherent in holding equity interests in other operating companies and other non-cash consideration we may receive for our services, (xii) the potential negative impact on our business of our restructuring or the failure to realize the anticipated savings associated therewith, (xiii) the uncertainty regarding government budgetary priorities and funding allocated to government agencies, including potential adverse effects from the U.S. government shutdown, (xiv) our ability to scale, expand the capacity of, and continue to develop the capabilities of our autonomous lab (including Nebula) on the timelines and to the extent we anticipate, (xv) the pace and degree to which autonomous laboratory infrastructure is adopted by, and displaces manual laboratory work in, the broader life sciences and industrial biotechnology markets, (xvi) the actual size, composition and growth of the addressable markets we target, which may differ materially from our estimates, (xvii) our ability to integrate our autonomous lab platform with third-party artificial intelligence models and other technologies, and the rate of development and adoption of such technologies, and (xviii) our ability to maintain and expand strategic partnerships and customer relationships, including those with named partners referenced in this release. The foregoing list of factors is not exhaustive. You should carefully consider the foregoing factors and the other risks and uncertainties described in the "Risk Factors" section of Ginkgo's annual report on Form 10-K filed with the U.S. Securities and Exchange Commission (the "SEC") on February 26, 2026 and other documents filed by Ginkgo from time to time with the SEC. These filings identify and address other important risks and uncertainties that could cause actual events and results to differ materially from those contained in the forward-looking statements. Forward-looking statements speak only as of the date they are made. Readers are cautioned not to put undue reliance on forward-looking statements, and Ginkgo assumes no obligation to update or revise these forward-looking statements, whether as a result of new information, future events, or otherwise. Ginkgo does not give any assurance that it will achieve its expectations.

INDUSTRY AND MARKET DATA

In this presentation, Ginkgo relies on and refers to certain information and statistics regarding the markets and industries in which Ginkgo competes. Such information and statistics are based on Ginkgo management's estimates and/or obtained from third-party sources, including reports by market research firms and company filings. While Ginkgo believes such third-party information is reliable, there can be no assurance as to the accuracy or completeness of the indicated information, and Ginkgo has not independently verified the accuracy or completeness of the information provided by the third-party sources.

USE OF NON-GAAP FINANCIAL MEASURES

Certain of the financial measures included in this presentation, including Adjusted EBITDA, cash flow and cash burn, have not been prepared in accordance with generally accepted accounting principles ("GAAP"), and constitute "non-GAAP financial measures" as defined by the SEC. Ginkgo has included these non-GAAP financial measures because it believes they provide an additional tool for investors to use in evaluating Ginkgo's financial performance and prospects. Due to the nature and/or size of the items being excluded, such items do not reflect future gains, losses, expenses or benefits and are not indicative of our future operating performance. These non-GAAP financial measures are supplemental to, and should not be considered in isolation from, or as an alternative to, financial measures determined in accordance with GAAP. In addition, these non-GAAP financial measures may differ from non-GAAP financial measures with comparable names used by other companies. See the reconciliation included in this presentation for additional information regarding certain of the non-GAAP financial measures included in this presentation, including a description of these non-GAAP financial measures and a reconciliation of the historic measures to Ginkgo's most comparable GAAP financial measures. Ginkgo does not reconcile its forward-looking non-GAAP financial measures to the corresponding GAAP measures, due to variability and difficulty in making accurate forecasts and projections and/or certain information not being ascertainable or accessible; and because not all of the information, such as unrealized equity gains and losses necessary for a quantitative reconciliation of these forward-looking non-GAAP financial measures to the most directly comparable GAAP financial measure, can be predicted with reasonable accuracy and is available to Ginkgo without unreasonable efforts. For the same reasons, Ginkgo is unable to address the probable significance of the unavailable information. Ginkgo provides non-GAAP financial measures that it believes will be achieved, however it cannot accurately predict all of the components of the adjusted calculations and the GAAP measures may be materially different than the non-GAAP measures.

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Agenda

Introduction

Jason Kelly, Co-Founder and CEO

Q4 2025 Financial Update

Steve Coen, CFO

Strategic Review

Jason Kelly, Co-Founder and CEO

Q&A Session

*Moderated by Daniel Marshall, Sr. Manager of
Communications and Ownership*



OUR MISSION

Make biology easier to engineer

IN 2026 GINKGO WILL FOCUS AND INVEST TO WIN AUTONOMOUS LABS

Focus Ginkgo's efforts on Autonomous Labs as the common platform for biotechnology research. Invest to extend our current progress in technology.

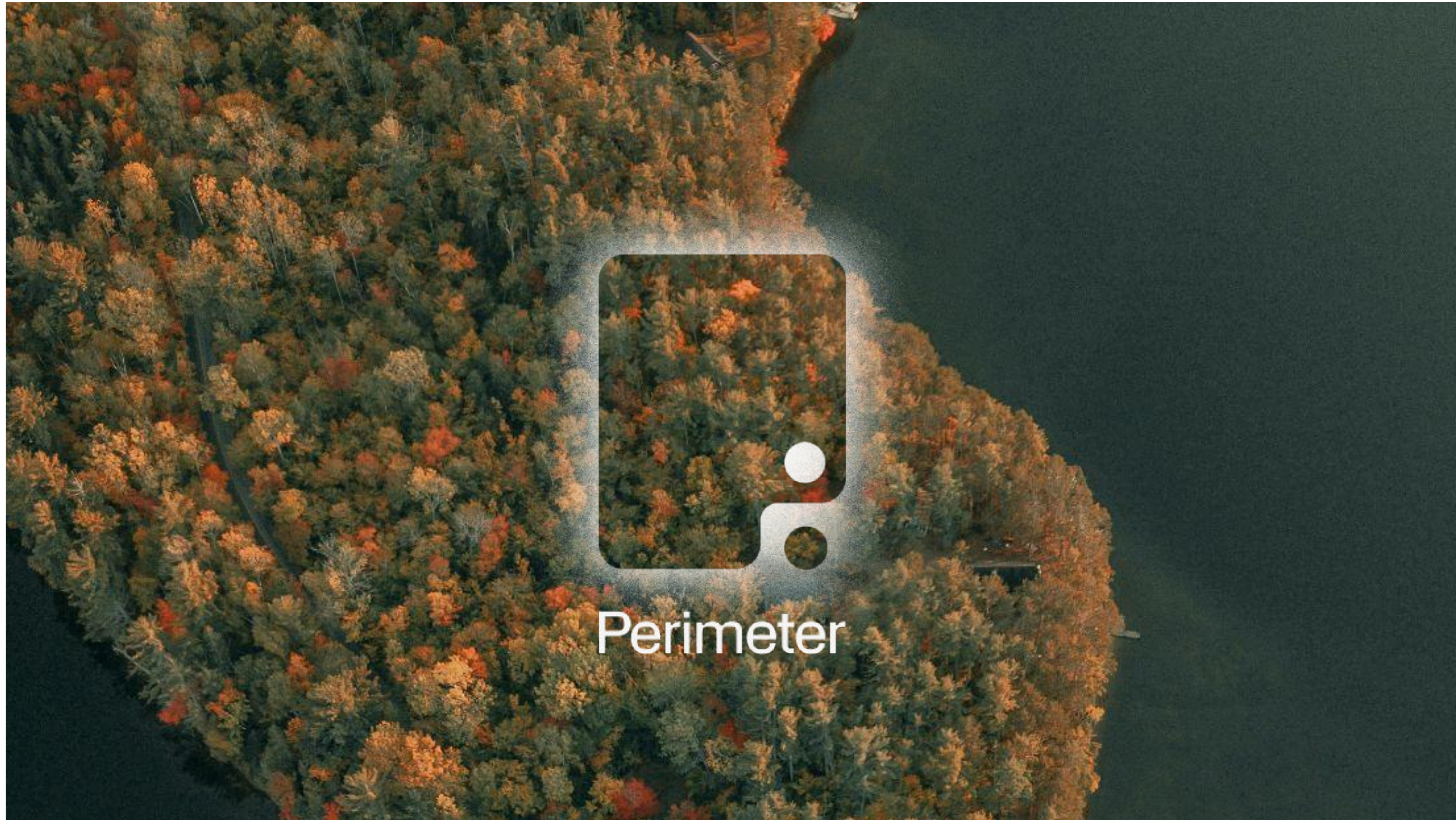
Demonstrate the capabilities of Autonomous Labs by decommissioning the majority of Ginkgo's lab benches, walk-up automation, and workcells and moving our three R&D services businesses onto a single, large Autonomous Lab.

Book new sales of Autonomous Labs in biopharma, national labs, and research universities.



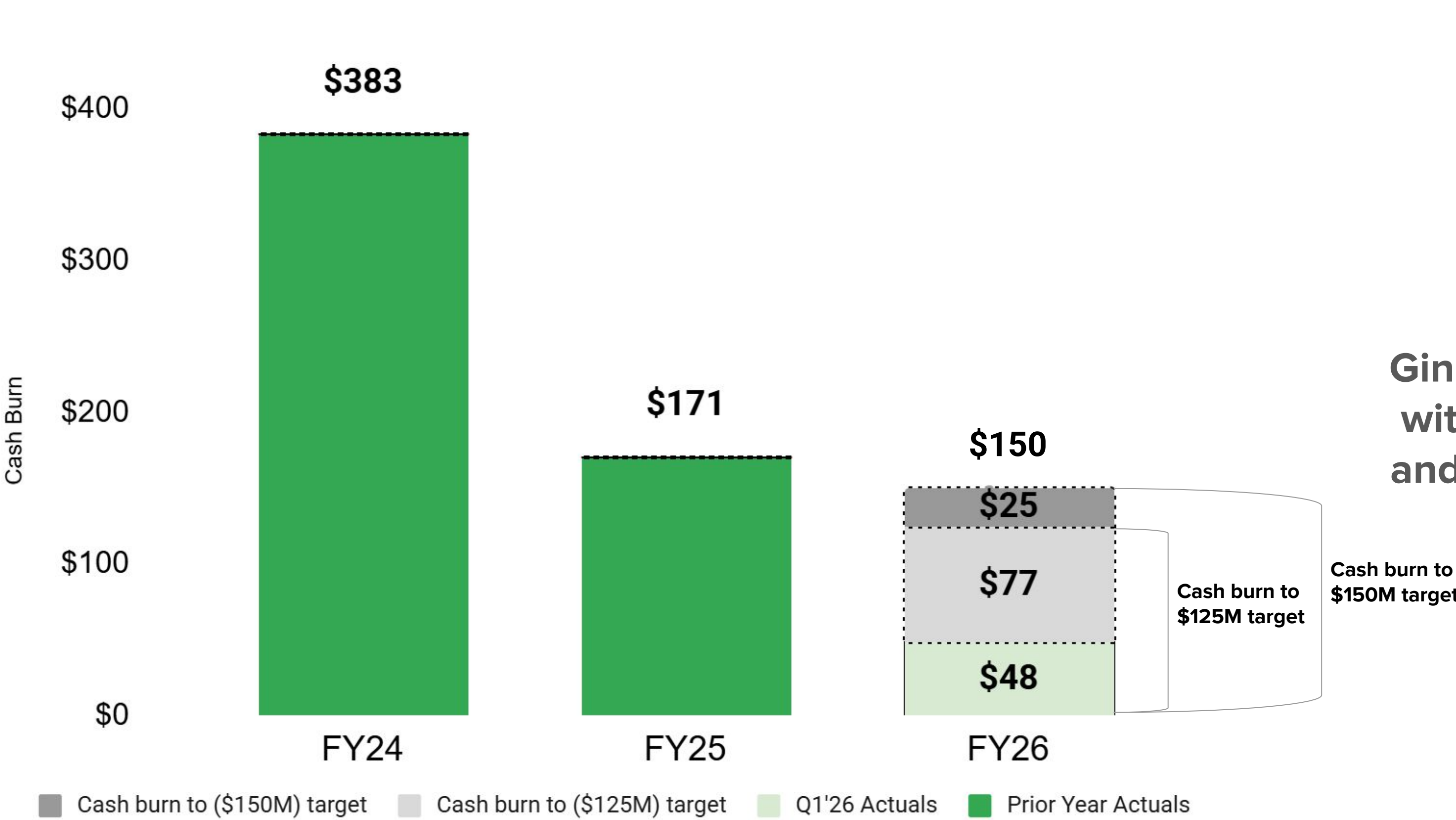
Good luck Perimeter!

Biosecurity Divestiture closed on April 3, 2026.



Our improved cash burn allows us to invest in winning Autonomous Labs (Unaudited)

ANNUAL CASH BURN⁽¹⁾ (\$M)




\$373M

Ginkgo remains in a strong financial position with **\$373 million** in cash, cash equivalents, and marketable securities with no bank debt as of Q1 2026

(1) References to cash burn is defined as change in GAAP cash, cash equivalents, and marketable securities excluding Company imposed cash restrictions, as adjusted for unrealized equity gains and losses. Cash burn excludes net proceeds from ATM sales. For a reconciliation of Cash burn, see the Appendix.



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Q1 2026 Financial Summary (Unaudited)

<i>In millions of USD</i>	Three Months Ended March 31,		
	2026	2025	% YoY
Revenue ⁽¹⁾	\$19	\$38	(49%)
Costs and operating expenses:			
Cost of other revenue ⁽²⁾	3	3	(14%)
Research and development ⁽²⁾	30	49	(38%)
General and administrative ⁽²⁾	13	20	(35%)
Stock-based compensation ⁽³⁾	17	18	(6%)
Depreciation and amortization	13	15	(14%)
Restructuring charges ⁽⁴⁾	(0)	4	NM
Carrying cost of excess space (net of sublease income) ⁽⁵⁾	16	12	35%
Merger and acquisition related expense (income) ⁽⁶⁾	0	(1)	(101%)
Other (income) expense, net ⁽⁷⁾	5	2	112%
Income taxes	0	0	NM
Net loss from continuing operations	(76)	(83)	9%
Adjusted EBITDA ⁽⁸⁾	(42)	(44)	5%
Capital expenditures (net of tenant improvement allowance)	2	4	(43%)
Cash burn ⁽⁹⁾	(48)	(58)	17%

1. Three months ended March 31, 2025 includes \$7.5 million of non-cash revenue from a release of deferred revenue relating to the mutual termination of a customer agreement with BiomEdit.

2. The costs and operating expenses exclude expenses which are separately captioned below.

3. Includes \$0.9 million and \$0.4 million in employer payroll taxes for the three months ended March 31, 2026 and 2025, respectively.

4. Restructuring charges primarily consist of employee termination costs from the reduction-in-force commenced in June 2024 and substantially concluded by December 31, 2025.

5. The carrying cost of excess space includes base rent, common area maintenance charges, and real estate taxes associated with facilities the Company is not occupying, net of any sublease income from these spaces.

6. Represents transaction and integration costs directly related to mergers and acquisitions, including: (i) legal, consulting and accounting fees associated with acquisitions, (ii) post-acquisition employee retention bonuses, (iii) (gain)/loss from changes in the fair value of contingent consideration liabilities resulting from acquisitions, and (iv) securities litigation costs.

7. Includes interest income, interest expense, loss on investments, changes in fair value of certain assets and liabilities, and other gains and losses.

8. For a reconciliation of Adjusted EBITDA, see the Appendix.

9. References to cash burn is defined as change in GAAP cash, cash equivalents, and marketable securities excluding Company imposed cash restrictions, as adjusted for unrealized equity gains and losses. Cash burn excludes net proceeds from ATM sales. For a reconciliation of Cash burn, see the Appendix.

Ginkgo reaffirms total cash burn guidance

<i>In millions of USD</i>	Historical	Outlook
	<u>FY2025</u>	<u>FY2026</u>
Total cash burn⁽¹⁾	(\$171)	(\$150) - (\$125)

(1) References to cash burn is defined as change in GAAP cash, cash equivalents, and marketable securities excluding Company imposed cash restrictions, as adjusted for unrealized equity gains and losses. Cash burn excludes net proceeds from ATM sales. For a reconciliation of Cash burn, see the Appendix.



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OUR MISSION

**Make biology
easier to engineer**

We believe...

1

**Autonomous labs will
replace the bench.**

2

**Nebula is showing what is
possible at the bleeding
edge.**

3

**Cloud Lab, Datapoints, and
Solutions are our version
of Starlink.**



We believe...

1

**Autonomous labs will
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2

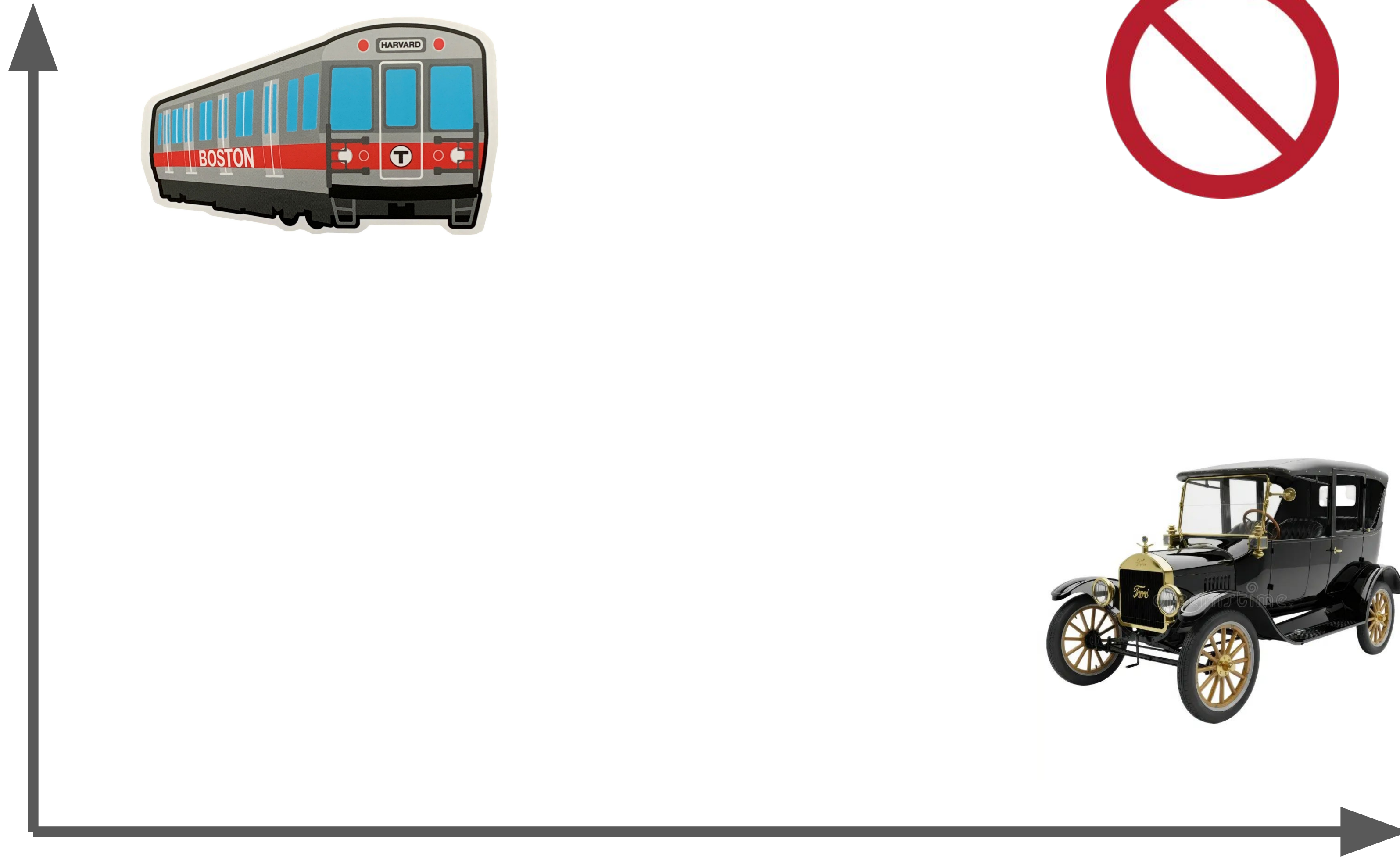
**Nebula is showing what is
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3

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Solutions are our version
of Starlink.**



**Amount of
Automation**



**Request
Flexibility**

**Amount of
Automation**



Autonomous Car

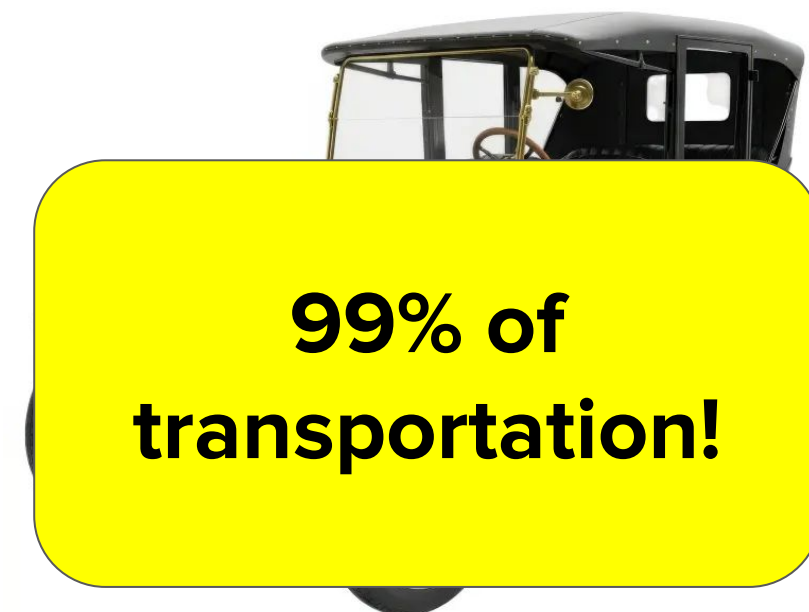


**Request
Flexibility**

**Amount of
Automation**



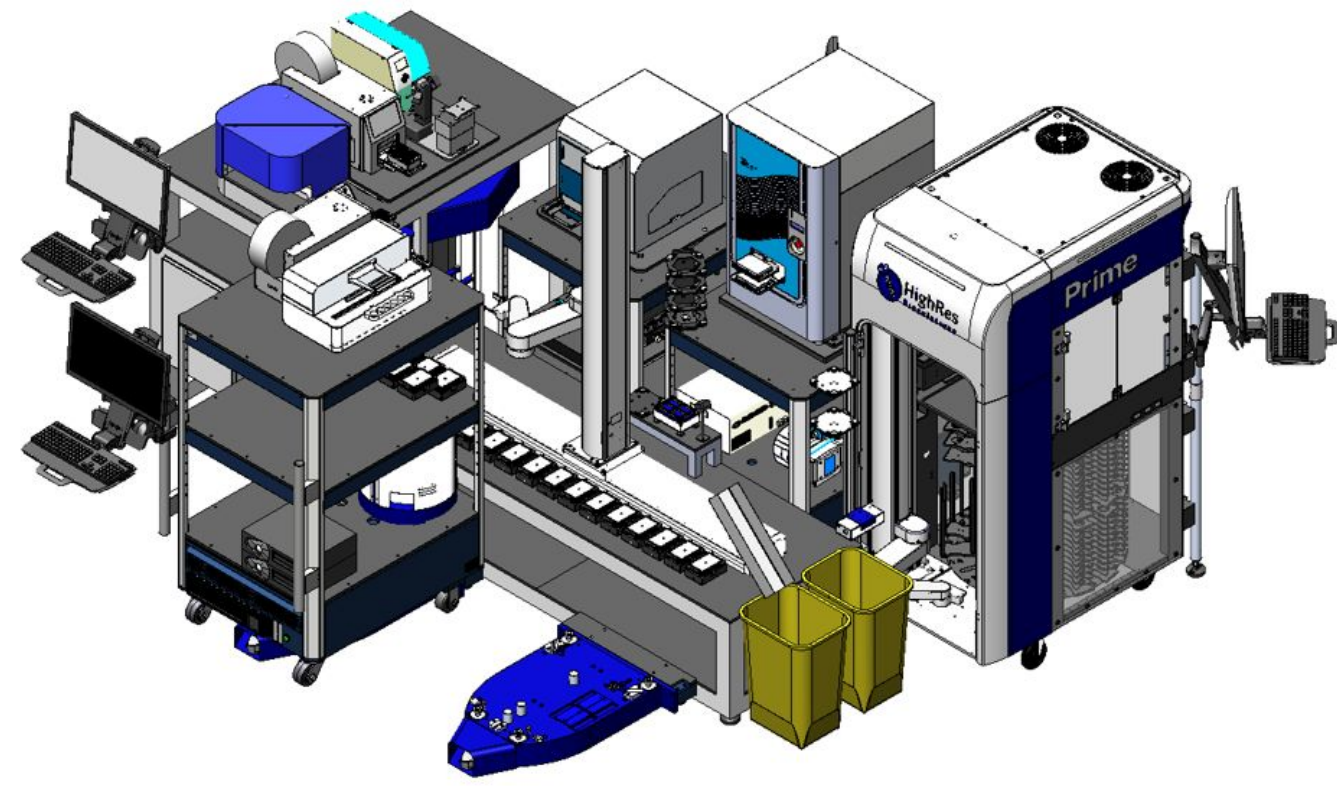
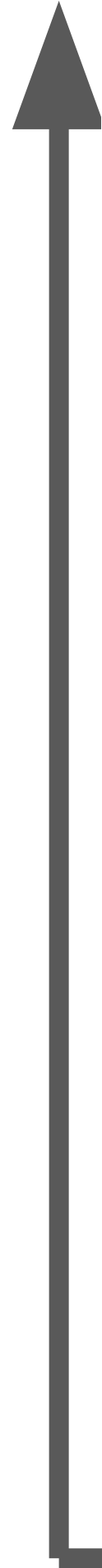
Autonomous Car



**99% of
transportation!**

**Request
Flexibility**

**Amount of
Automation**



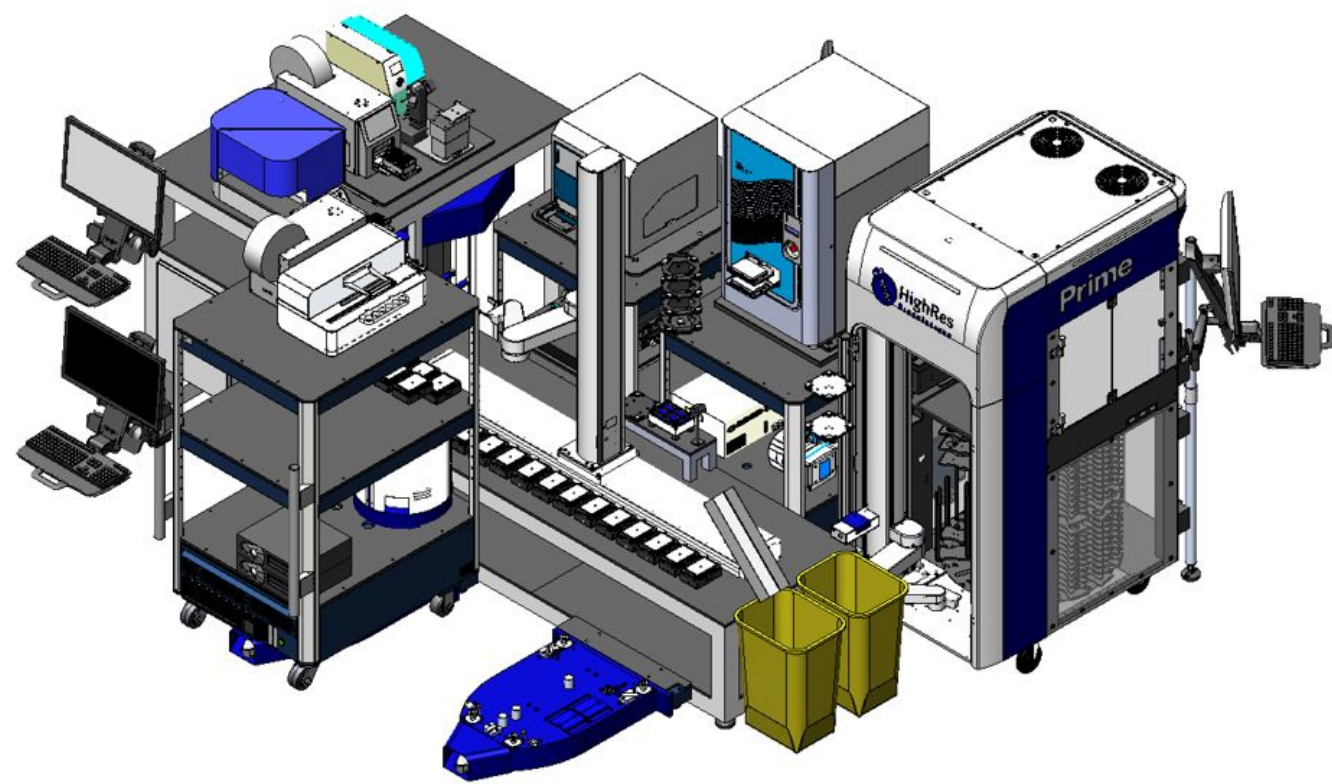
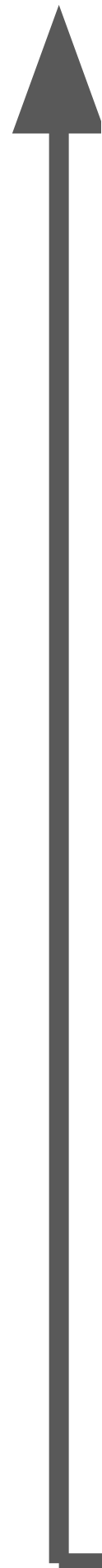
Traditional
Automation
Workcell



**Request
Flexibility**



**Amount of
Automation**



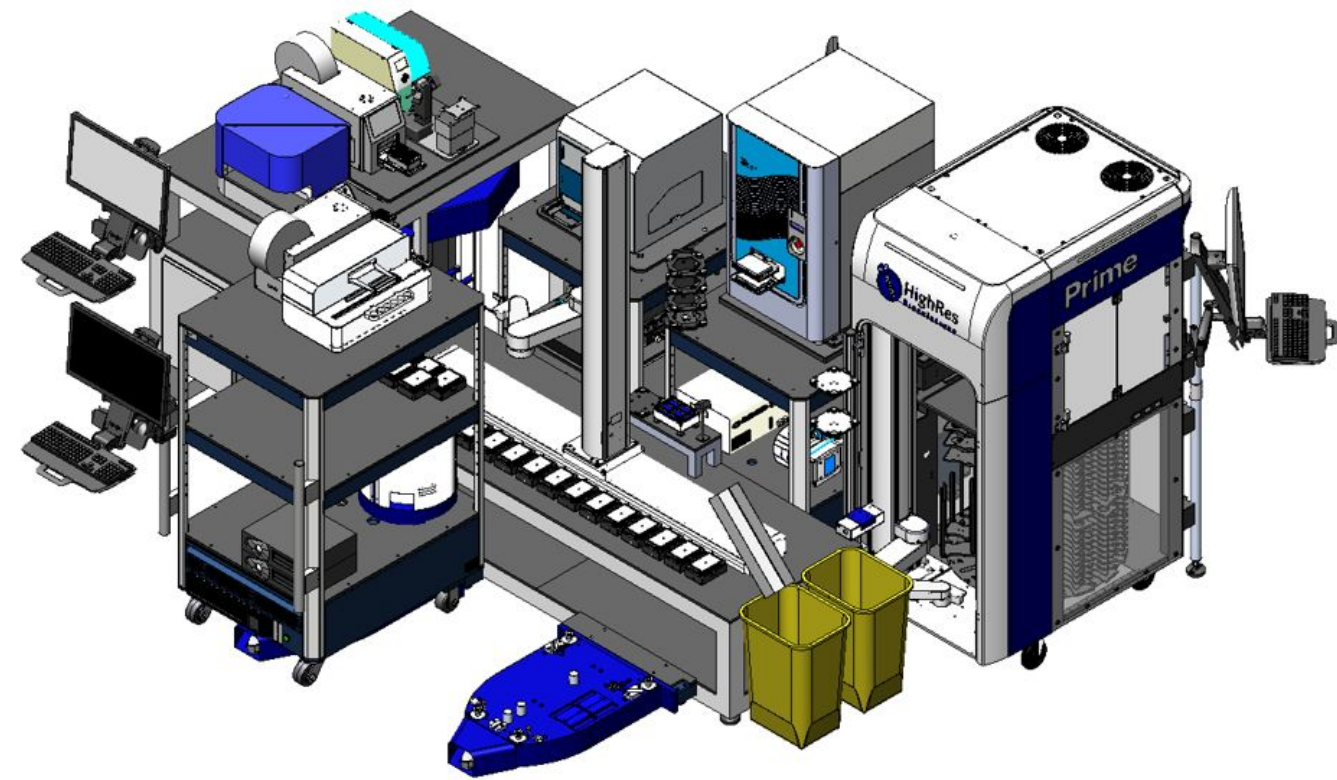
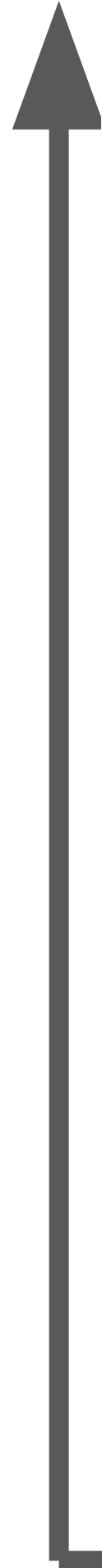
Traditional
Automation
Workcell



**Request
Flexibility**



**Amount of
Automation**



Traditional
Automation
Workcell



Ginkgo
Autonomous
Lab



**Request
Flexibility**



Value proposition today to kill the lab bench:

1. Save massive overhead costs on space by closing or not building traditional lab benches
2. Increase research productivity of your human scientists in an age of AI where we need more data per research \$.
3. Enable AI-scientists to run “Lab in the loop” experiments with robotic hands in the lab

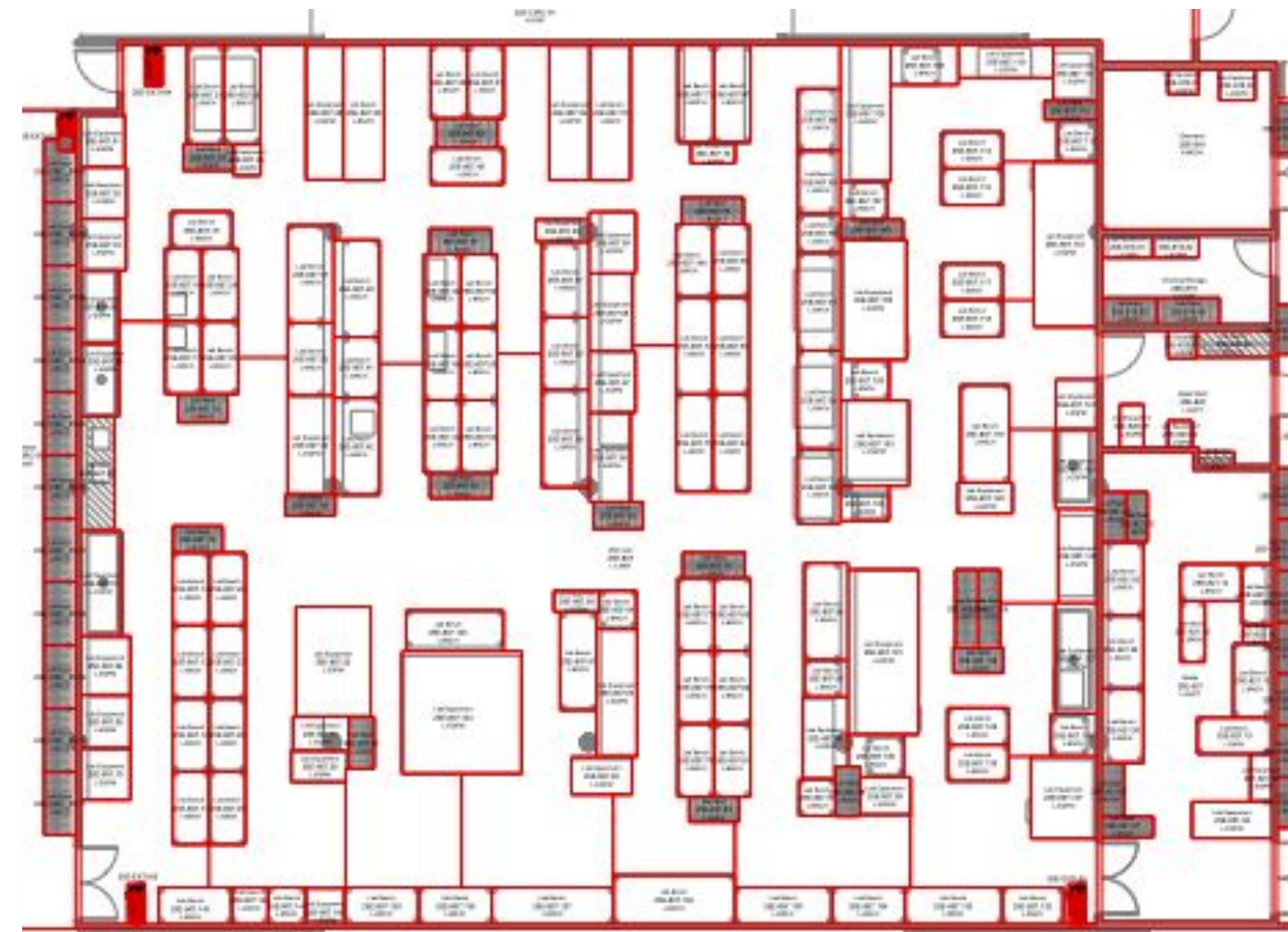
A typical large pharma spends \$1-3B/yr on research (not development) across million+ of sq.ft. of lab benches and <\$100M/yr (usually much less) on lab automation today. Those numbers should flip.



The ROI for an autonomous lab is clear.

Our manual lab used **~3x the space per instrument** compared to our autonomous lab.

Traditional Lab



Operational 40 hours a week.

Autonomous Lab



Operational 168 hours a week
(a 4x improvement).

**Value is there if we can deliver
on the key technical challenge:**
How do you get both high
automation and high flexibility
without human hands in the lab?

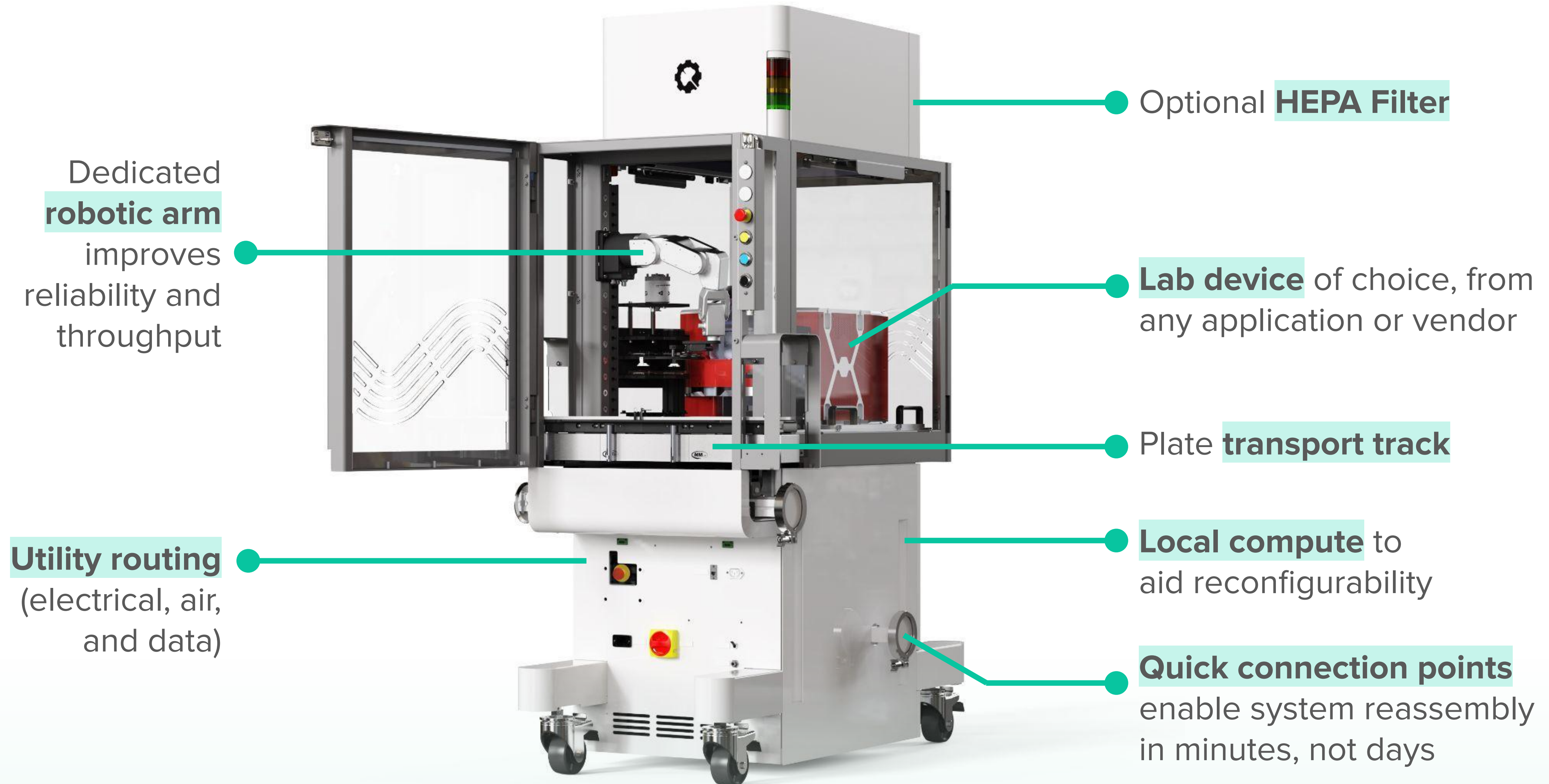
Workcells are designed around your workflow / protocol because they assume no variability in user requests.



Autonomous labs are designed around your equipment because they assume variability equal to a manual lab.



RACs solve the challenges of conventional, inflexible automation systems with their unique, modular architecture



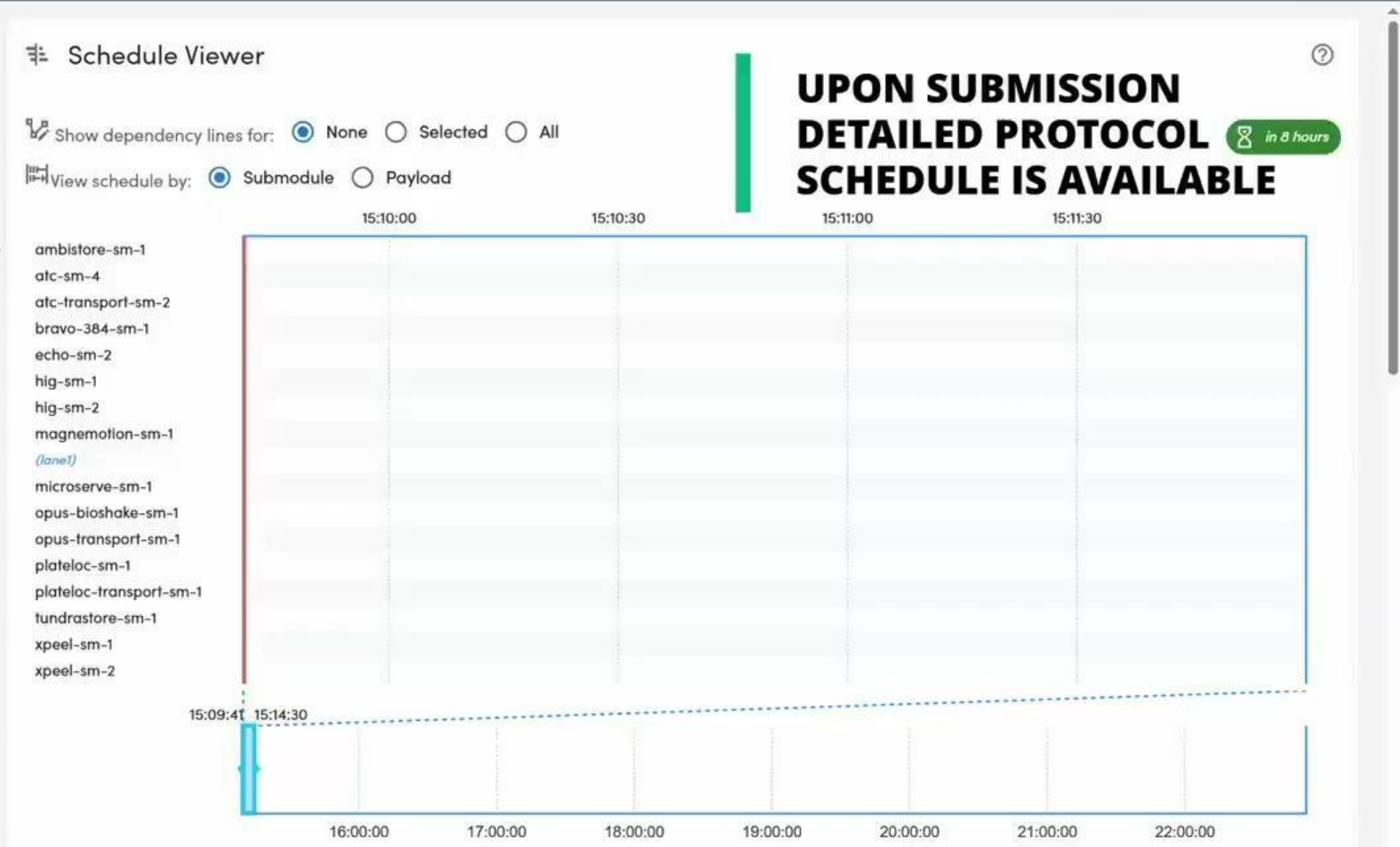


GINKGO BIOWORKS

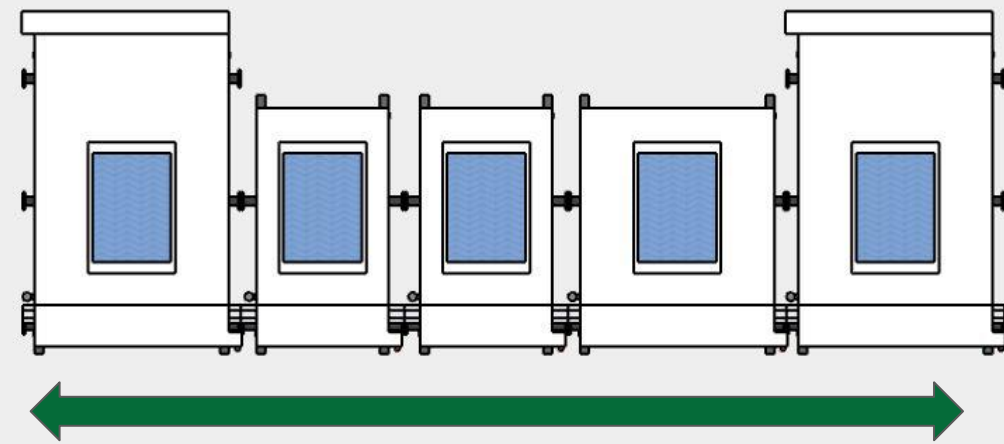
nebula Module 7.3.0

- Schedule (0 / 403)
- Requests
- Submodules (39 / 42)
- Inventory (99+)
- History
- Batches
- Protocol Runs
- User Actions
- Troubleshooting

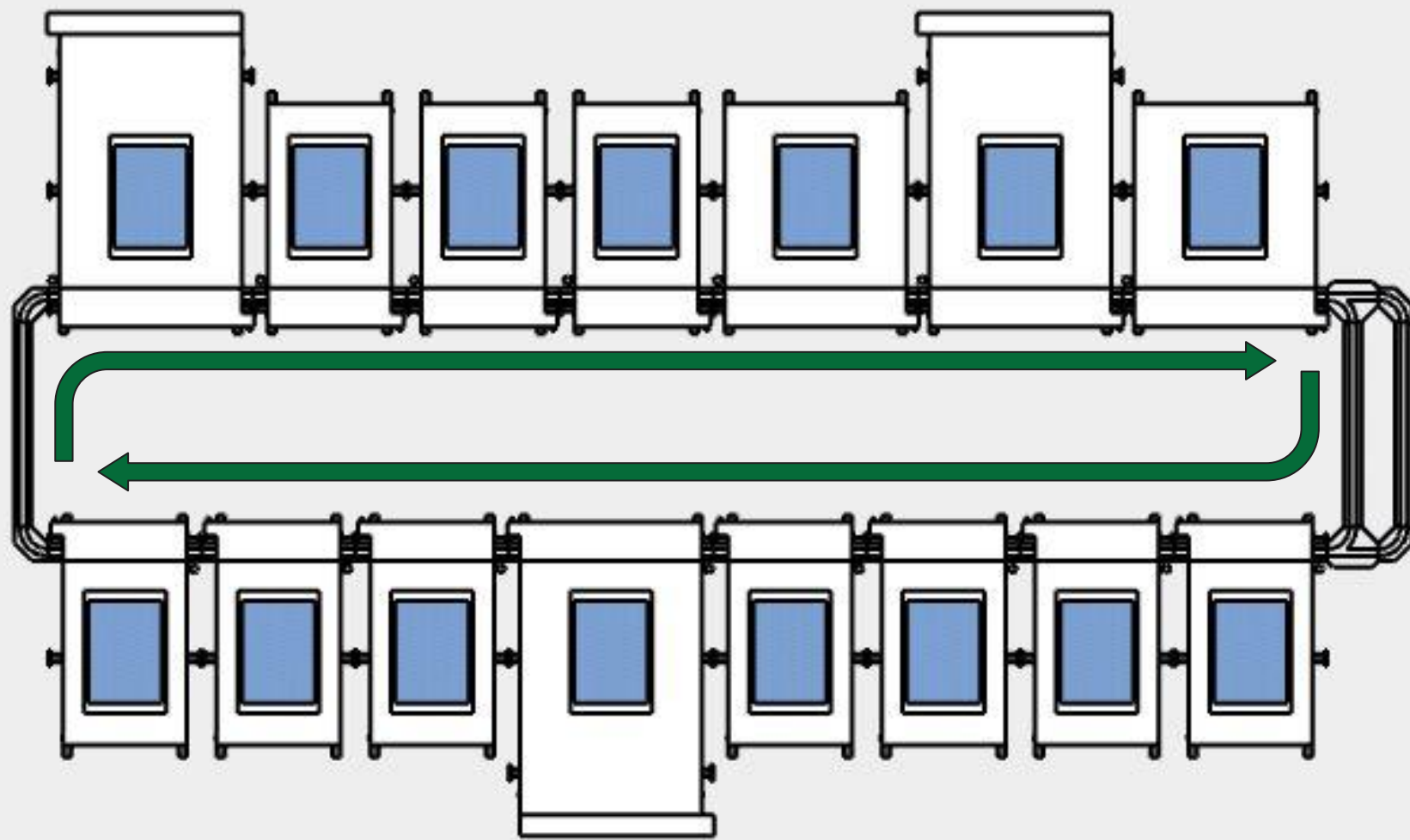
Current Status: **Running** (PAUSE)



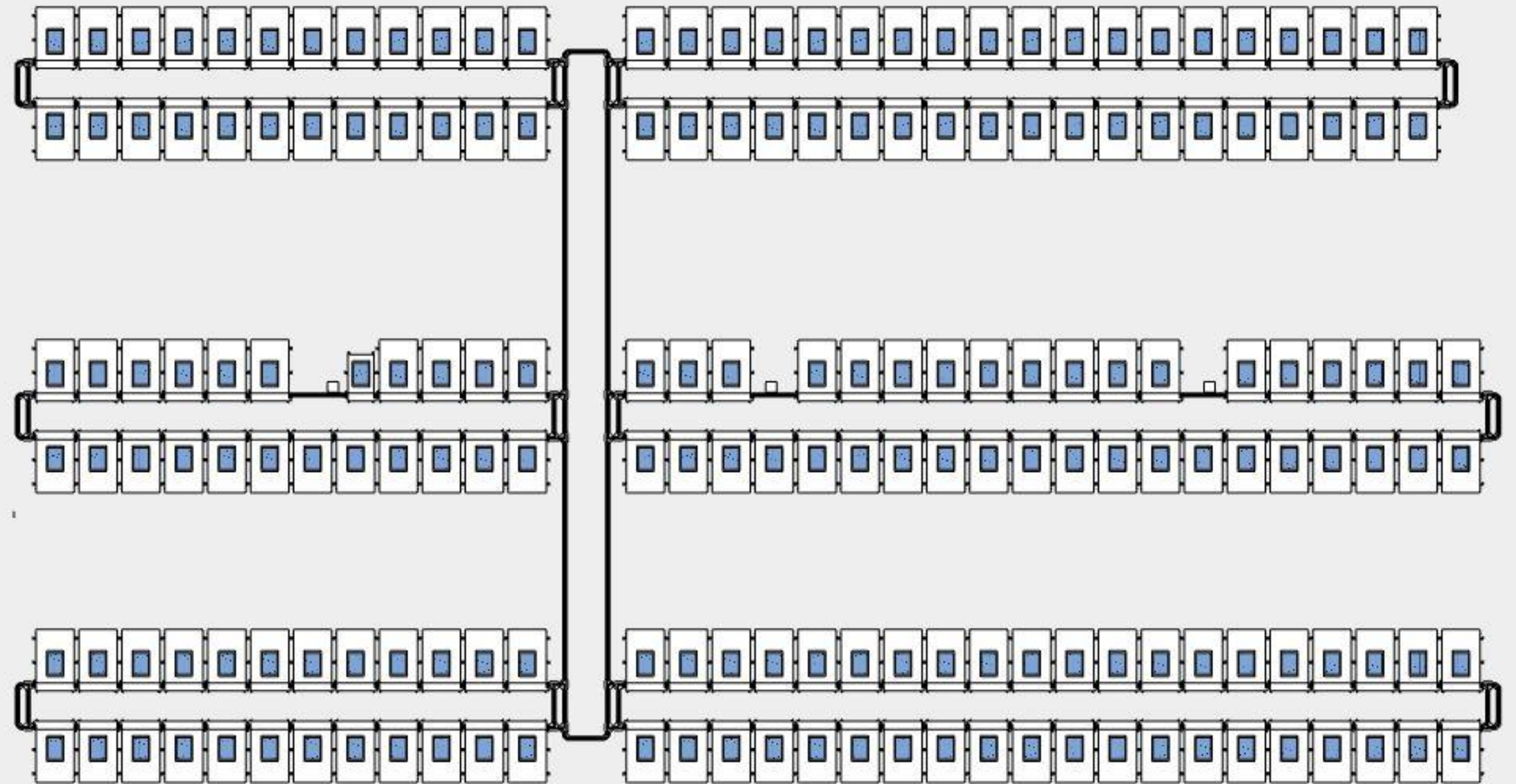
RAC Systems Can Scale With Need



Linear RAC System
(2-5 RACs)



Closed Loop RAC System
(10-20 RACs)



Mega RAC "One-of-Everything"
System
(100+ RACs)



We believe...

1

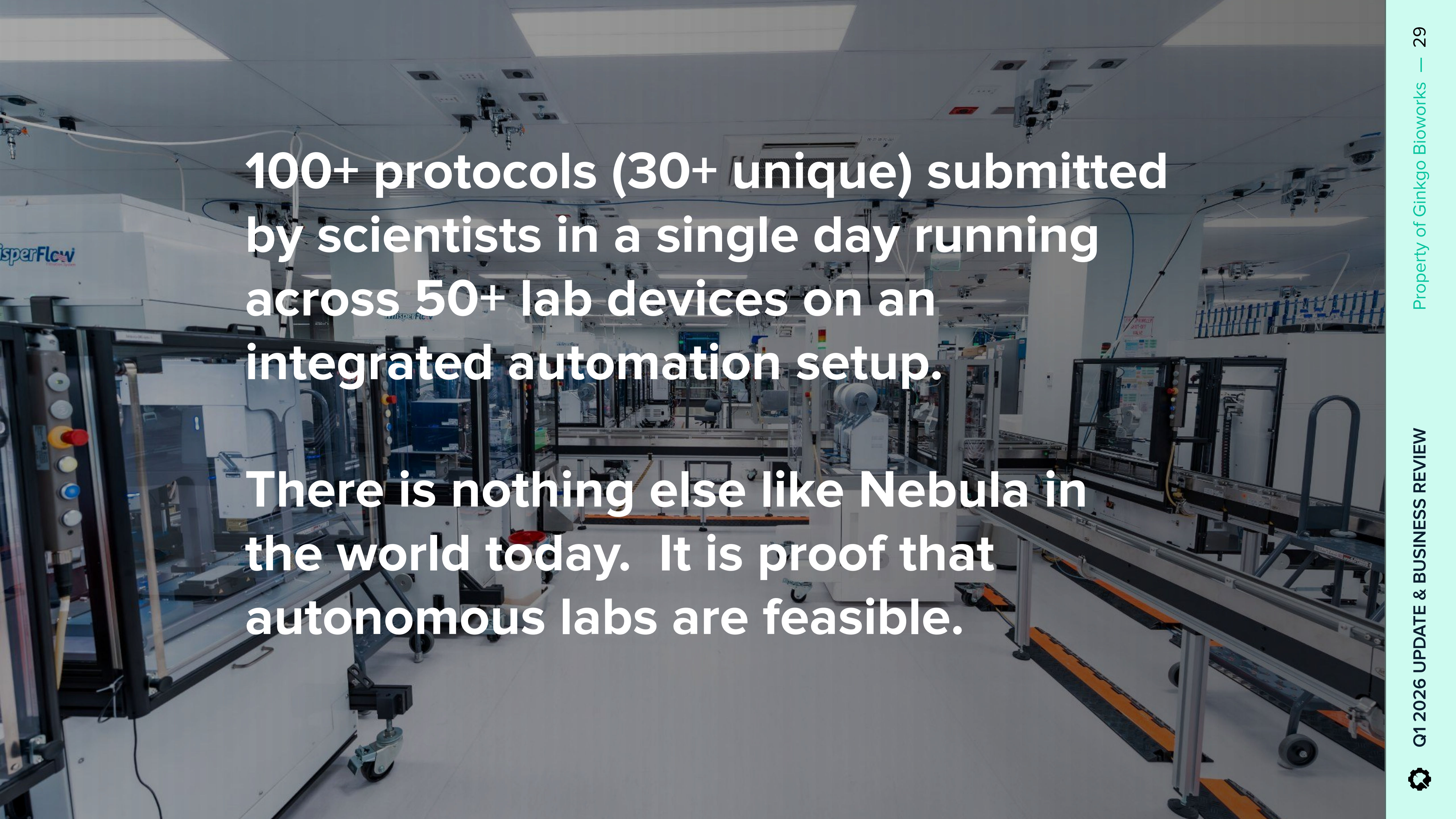
**Autonomous labs will
replace the bench.**

2

**Nebula is showing what is
possible at the bleeding
edge.**

3

**Cloud Lab, Datapoints, and
Solutions are our version
of Starlink.**

A wide-angle photograph of a state-of-the-art laboratory. The room is filled with rows of white and grey automated lab equipment, including liquid handling robots and incubators. The ceiling is high with various sensors and lights. The floor is clean and light-colored. The overall atmosphere is one of a highly organized and technologically advanced research environment.

100+ protocols (30+ unique) submitted by scientists in a single day running across 50+ lab devices on an integrated automation setup.

There is nothing else like Nebula in the world today. It is proof that autonomous labs are feasible.

What it takes to replace the manually-operated lab

1. Connect 100+ devices in a single automation setup with reliable sample transport and delivery to devices via **RAC productized hardware**
2. 10s-100s of different protocols must run in parallel on the same autonomous lab via **Catalyst scheduler**
3. Scientist (not automation engineers) can design and submit new protocols daily with ease via **AI coding tools with custom harness.**



Nebula, at our Boston HQ, is expected to grow from 50 to 105 RACs by the end of this month



14:00:00

14:30:00

15:00:00

15:30:00



View	Priority	Name	Status	Scheduled End	ID	Requested By	Created	Action
<input checked="" type="checkbox"/>	1	HIBIT	In Progress	Jan 14, 2026 12:53 pm	5c875fc5 8066 - 498d - 8f28 - c7a11210f6d9	pichel	4 hours ago	ABORT
<input checked="" type="checkbox"/>	1	SEQWELL_ATC_METHOD	Scheduled	Jan 14, 2026 2:09 pm	cc958f7d 579a - 48af - 9f61 - b28a865b37dd	asmith	31 minutes ago	ABORT
<input checked="" type="checkbox"/>	5	GENERIC_PHERASTAR_READ	In Progress	Jan 14, 2026 12:42 pm	dc507723 8e3f - 4387 - 8be6 - 994d08b11494	wthavarajah	36 minutes ago	ABORT
<input checked="" type="checkbox"/>	5	GENERIC_SPARK_READ	In Progress	Jan 14, 2026 12:45 pm	97aa7c0d c6d1 - 4fbb - 833c - 6d62dbe5ca09	apeters	5 hours ago	ABORT
<input checked="" type="checkbox"/>	5	SEQWELL_ATC_METHOD	In Progress	Jan 14, 2026 12:47 pm	08feae70 0f34 - 44bb - 9322 - 43ffe66dde9	aylntai	2 hours ago	ABORT
<input checked="" type="checkbox"/>	5	TEST_SIMPLE_E_COLI_GLYCEROL_TO_PELLET	In Progress	Jan 14, 2026 1:01 pm	fb77d8a5 0e9b - 4a4d - 97d4 - 741622f12240	smccolm	a day ago	ABORT
<input checked="" type="checkbox"/>	5	XEROX_DNA_PRIMER_REARRAY	In Progress	Jan 14, 2026 1:41 pm	6d554130 042c - 46aa - 963f - 74465e813d6d	mortuno	6 hours ago	ABORT
<input checked="" type="checkbox"/>	5	TEST_BVP_ELISA - DATAPOINTS	In Progress	Jan 14, 2026 5:05 pm	f72e7b23 ab10 - 44d1 - a142 - ab36be989df5	bharris	2 hours ago	ABORT
<input checked="" type="checkbox"/>	5	GENERIC_SPARK_READ	Scheduled	Jan 14, 2026 12:56 pm	e4a79a12 a8ab - 44ad - b394 - 5d6394bd29a4	apeters	5 hours ago	ABORT
<input checked="" type="checkbox"/>	5	GENERIC_SPARK_READ	Scheduled	Jan 14, 2026 1:05 pm	991a4d3d 214f - 4d8e - be25 - fb484838105d	apeters	5 hours ago	ABORT
<input checked="" type="checkbox"/>	5	GENERIC_SPARK_READ	Scheduled	Jan 14, 2026 1:11 pm	c82a23a9 87a9 - 4152 - a8c5 - 93cc873acae9	apeters	4 hours ago	ABORT
<input checked="" type="checkbox"/>	5	TEST_BC_P683_PHM_PE_LIBRARY_SCREEN_PART_1	Scheduled	Jan 14, 2026 1:18 pm	26ce8fff e4f0 - 4a44 - 9524 - 586549adf4b6	jvue	3 hours ago	ABORT
<input checked="" type="checkbox"/>	5	ADP_GLO	Scheduled	Jan 14, 2026 1:51 pm	6ff26ac4 435a - 454d - bf95 - a49916c02920	irivera	2 hours ago	ABORT
<input checked="" type="checkbox"/>	5	ADP_GLO	Scheduled	Jan 14, 2026 1:58 pm	1caceb8d 6828 - 4a2f - aa2a - 951077b67b87	irivera	2 hours ago	ABORT
<input checked="" type="checkbox"/>	5	PROTEOMICS_DIGEST_ACIDIFY_FILTER_V1	Scheduled	Jan 14, 2026 2:03 pm	43e968a1 8b82 - 432b - b3e4 - 50203e72eb91	eyasi	43 minutes ago	ABORT
<input checked="" type="checkbox"/>	5	ADP_GLO	Scheduled	Jan 14, 2026 2:12 pm	218a1b33 6877 - 4a7e - 8806 - 27b5502d0736	irivera	2 hours ago	ABORT
<input checked="" type="checkbox"/>	5	QPCR_P774_SAMPLE_QUANTIFICATION	Scheduled	Jan 14, 2026 3:57 pm	6b3ad53f de45 - 4973 - b346 - 95d911256beb	aimable	an hour ago	ABORT

USG policy and investment will also drive towards autonomous labs

THE WALL STREET JOURNAL.

HEALTH • PHARMA

Big Pharma Is Turning to China for the Newest Drug Ideas

China's biotechs are faster and have lower costs, and its drug research threatens to soon overtake the West's



PRESIDENTIAL ACTIONS

LAUNCHING THE GENESIS MISSION

Executive Orders | November 24, 2025



National Science Foundation (NSF)

8mo •

+ Follow

The U.S. National Science Foundation is investing up to \$100 million in a new national network of AI-programmable cloud laboratories.

119TH CONGRESS
1ST SESSION

S. 2676

To require the Director of the National Science Foundation to carry out a cloud laboratory network program, and for other purposes.

IN THE SENATE OF THE UNITED STATES

AUGUST 1, 2025

Mr. YOUNG (for himself and Mr. KING) introduced the following bill; which was read twice and referred to the Committee on Commerce, Science, and Transportation

A BILL

To require the Director of the National Science Foundation to carry out a cloud laboratory network program, and for other purposes.

Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled,

SECTION 1. SHORT TITLE.

This Act may be cited as the "Cloud Labs to Advance Biotechnology Act of 2025" or the "Cloud LAB Act of 2025".



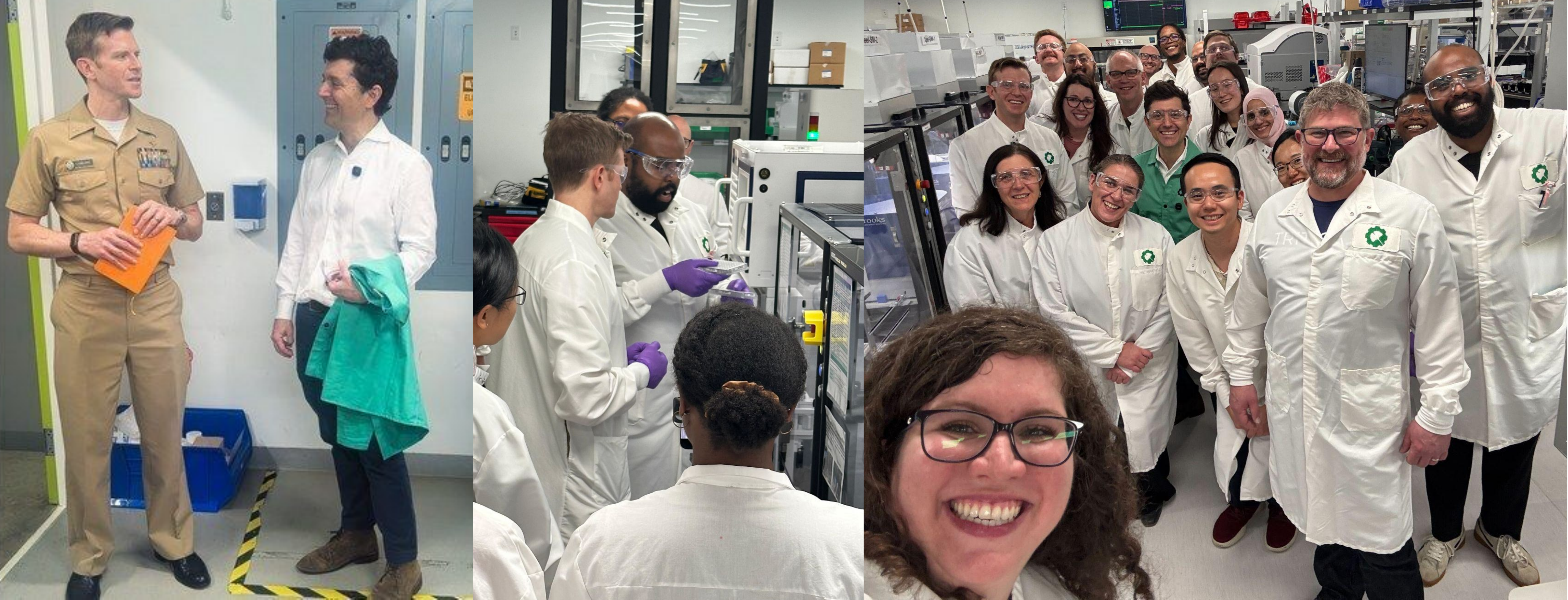
Ginkgo Joins Genesis Project to Build a \$47 Million Autonomous Robot Lab

Mohamed Soufi • Dec 9, 2025

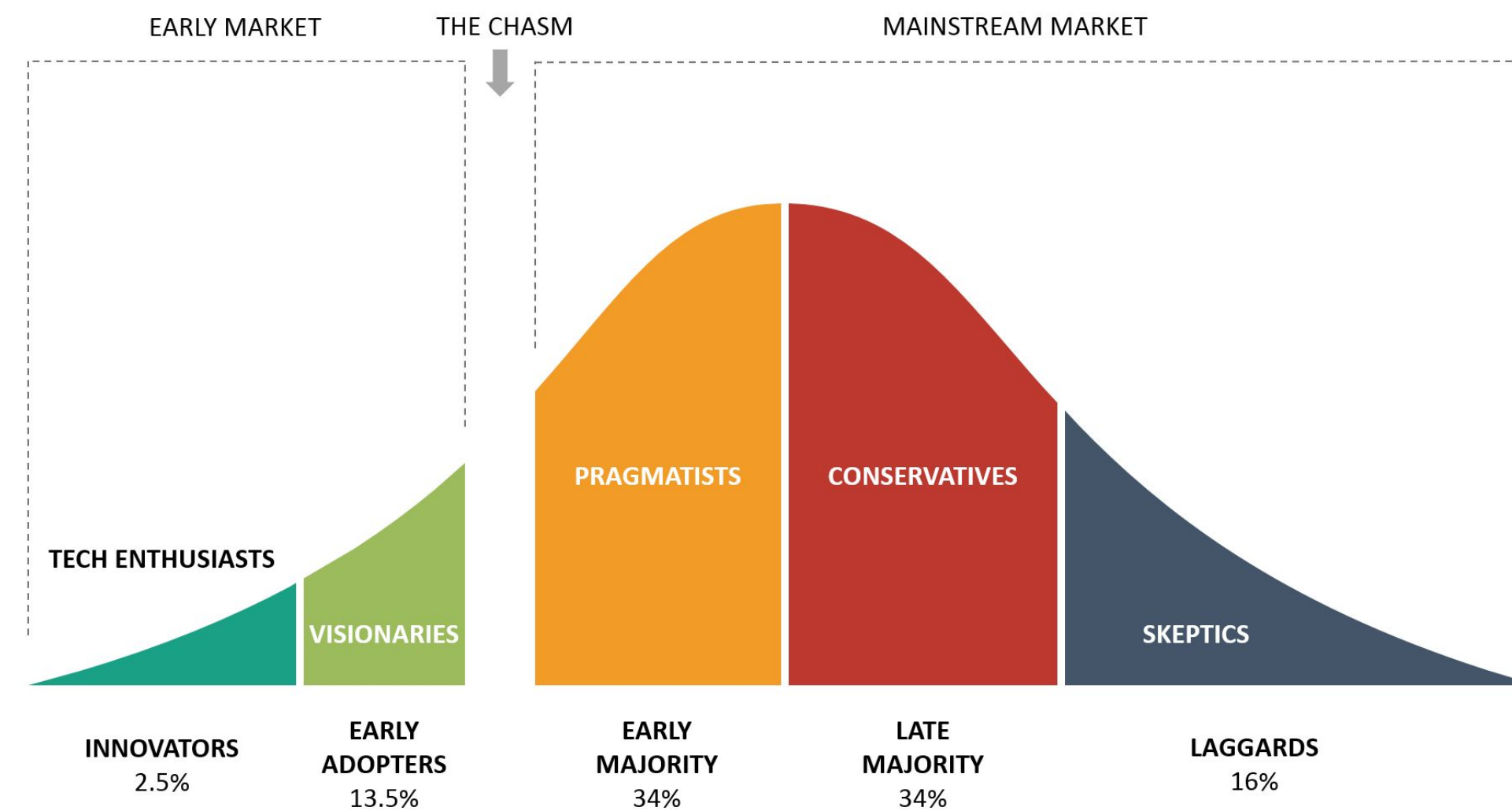
SOURCES: PNNL + Synbiobeta



ARPA-H Gets a Tour of Nebula



We are using Nebula to showcase what is possible – but we are also building autonomous labs for early-adopter customers.





600+ visitors in Q1



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Every service we do on top of our autonomous lab generates revenue *and* helps us improve it.



SpaceX launches 10,000th Starlink satellite, with no sign of slowing down

Sunday was not a day of rest for SpaceX.

STEPHEN CLARK - OCT 20, 2025 2:38 PM | 115



GINKGO
DATAPOINTS



GINKGO
REAGENTS



GINKGO **Cloud Lab**



Want to run an experiment? For \$39, robots will do it for you

The rise of labs powered by AI tools like Chat GPT could dramatically accelerate drug discovery and production. The revolution is here — but could be misused



A robotic arm operates at a lab at Ginkgo Bioworks in Boston, Massachusetts

ADAM GLANZMAN/BLOOMBERG VIA GETTY IMAGES

Danny Fortson, West Coast Correspondent

Saturday May 02 2026, 11.00am BST, The Sunday Times

cloud.ginkgo.bio

Today: 10 protocols. Tomorrow: your protocol.

We're building the protocol library that makes wet labs optional. Every instrument in our fleet can be composed into new workflows.

~1 new protocol each week

A screenshot of a software interface for 'EstiMate'. The title bar shows 'EstiMate' and 'Compatibility & pricing assistant' with standard window controls. The main content area features a message from the AI assistant: 'Hi! I'm EstiMate 🧬 I help you evaluate whether your protocol is a fit for our Cloud Lab and provide preliminary cost estimates. Tell me about your protocol, upload a file (📎), or paste a link (🔗) and I'll walk you through compatibility and pricing.'



Science run on our cloud lab is already making headlines.

OpenAI @OpenAI

We worked with [@Ginkgo](#) to connect GPT-5 to an autonomous lab, so it could propose experiments, run them at scale, learn from the results, and decide what to try next. That closed loop brought protein production cost down by 40%.




2:07 PM · Feb 5, 2026 · 2.8M Views

440 1.8K 9.4K 2.7K

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AI LIFESCIENCES

Ginkgo Bioworks' Reshma Shetty on Moving Biology Off the Bench

Mukundan Sivaraj · FEBRUARY 19, 2026, 2:55 AM

Autonomous infrastructure and AI agents change how experiments are designed and executed

February 5, 2026 Research Publication

GPT-5 lowers the cost of cell-free protein synthesis

Working with Ginkgo Bioworks, we created an AI-driven autonomous lab and achieved a 40% reduction in protein production cost.

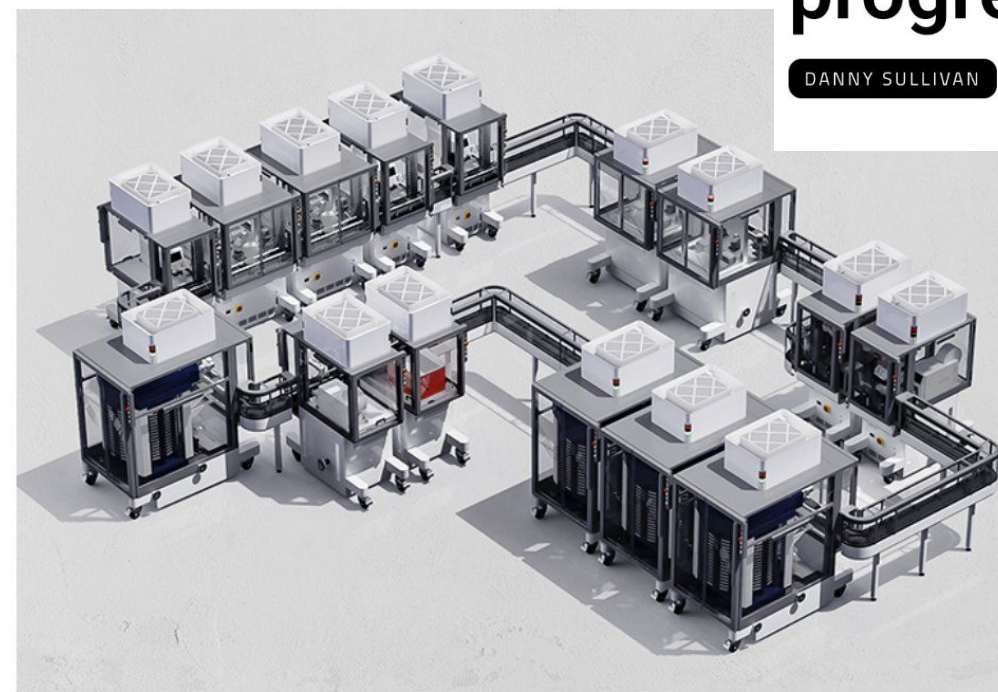
[Read the paper](#)

Ginkgo co-founder Reshma Shetty on autonomous labs, AI-designed experiments and the human side of the equation

By Brian Buntz | February 18, 2026

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Ginkgo Bioworks started in a **Cambridge apartment in 2008**. Five MIT scientists: Shetty, Jason Kelly, Barry Canton, Austin Che and their adviser Tom Knight, set out to make biology easier to engineer. Tom Knight, originally trained in computer science and engineering, shifted into biology before co-founding Ginkgo Bioworks with four MIT colleagues. The team's founding premise was that software, automation, and biological design could be combined to make biology easier to engineer in ways traditional bench work alone could not match.



AI/TECH FEB 23, 2026

Could Ginkgo's OpenAI collab accelerate progress in longevity?

DANNY SULLIVAN



nature

Will self-driving 'robot labs' replace biologists? Paper sparks debate

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AI LIFESCIENCES

Ginkgo Bioworks and OpenAI Advance Autonomous Lab Research Systems

AI can design and run lab experiments, pointing to autonomous research systems that shift scientific bottlenecks from humans to compute.

AIM · APRIL 21, 2026, 8:45 AM

IN VIVO Strategic Industry Insights

In Vivo » Innovation

The Autonomous Lab: Part 1

Mar 05 2026 · By David Wild · 7 min read

Summary BETA Download Translate BETA Bookmark Listen to this article BETA

In this two-part series, In Vivo examines who is building the autonomous lab, what architectural and business model choices they are making, and what the implications are for drug discovery organizations, external R&D partnerships and the workforce that will be asked to operate these systems.



New channels appearing for cloud lab and datapoints services

INTELLIGENCE

AI & Tech Brief: Amazon puts biology in the cloud

Plus, an Nvidia executive explains the "Omniverse."
Today at 2:37 p.m. EDT

7 min Summary 0

Make us preferred on Google

By Benjamin Guggenheim

Amazon Bio Discovery

Design Better Antibodies with AI-Powered Lab-in-the-Loop Workflows

Start free trial

One-click ordering for experiments and data with Twist Bioscience, Adaptyv, and Ginkgo Bioworks

Benchling × TWIST BIOSCIENCE

Adaptyv

GINKGO BIOWORKS

Introducing the Tamarind Bio Assay Portal

Tamarind Bio

introducing

Assay Portal

in collaboration with...

- A-ALPHA BIO
- GINKGO BIOWORKS
- Adaptyv



Datapoints Defined the Category of Bio-AI Data Provider

Worked with 10 Top Pharma Customers in Its First Full Year

SCALED AUTOMATED WETLAB WORKFLOWS

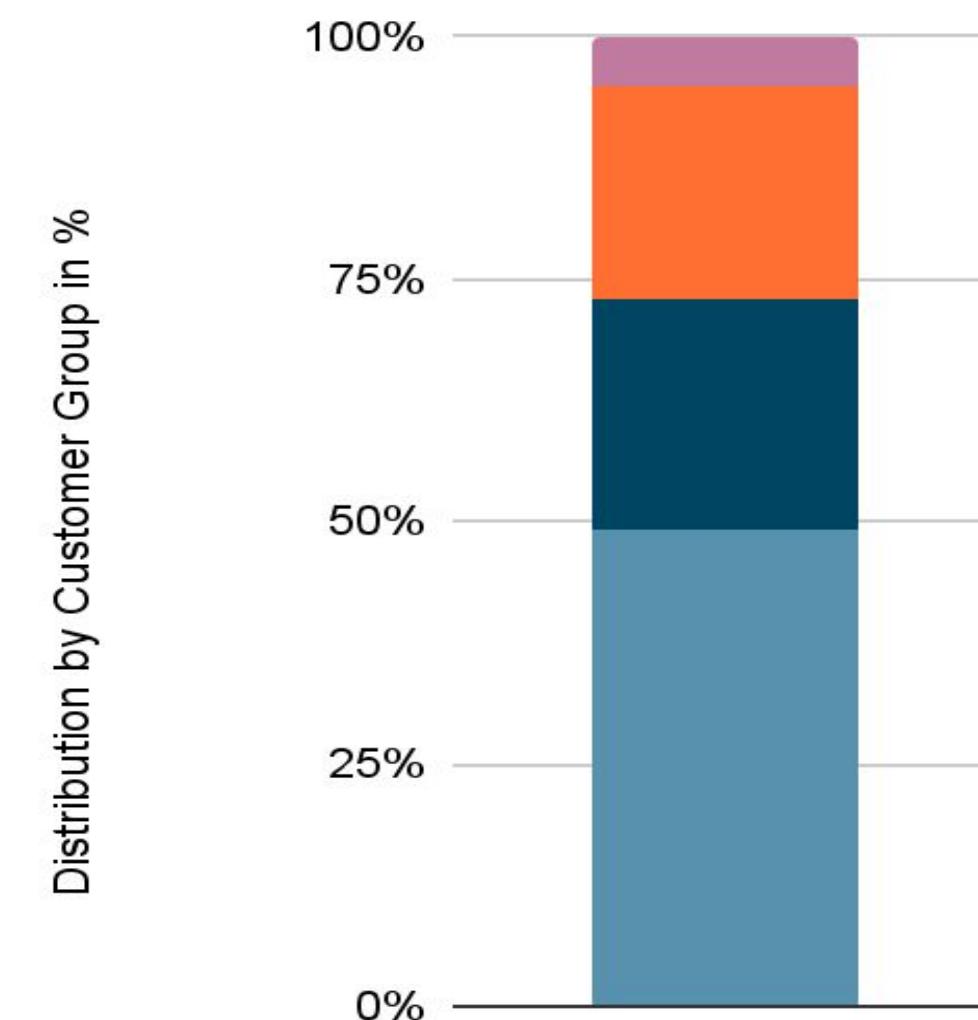
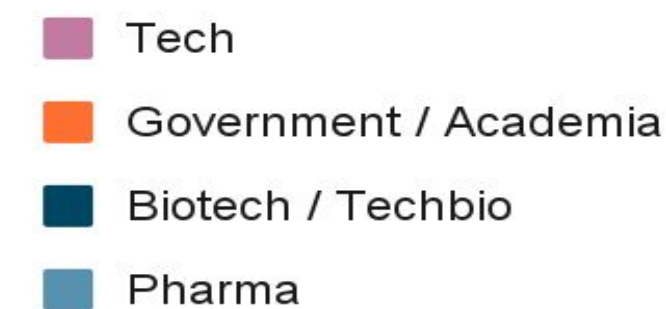


Launched in Q4 2024

Generated 100,000+ Antibody datapoints

Generated 2.5 Billion Omics datapoints

STRONG CUSTOMER DEMAND ACROSS SEGMENTS



RELEASED MULTIPLE PUBLIC DATASETS

- GDPa1** Largest public IgG AbDev dataset
- GDPx1** DRUG-seq in large compound library
- GDPx2** DRUG-seq in 4x primary cells
- GDPx3** Cell Painting in 3x primary cells
- GDPsm1** Tier 1 ADME data on 250+ cmpds
- GDPa2** vhh Antibody Dataset
- GDPa3** Natural IgG developability dataset
- VCPI** Virtual Cell Pharmacology Initiative

[Disclosed Partners]



ARPA-H



... and dozens of other undisclosed customers

Note: Logos are authentic customers (shared with permission); this is not an exhaustive list.



Datapoints is your partner for the Bio x AI era

Antibody Developability Competition

Virtual Cell Pharmacology Initiative



2025 Antibody
Developability Competition
 **GINKGO**
DATAPOINTS



Datapoints Summit Series

Data Drops



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Accelerating AI for Drug Discovery: Ginkgo's GDPx Functional Genomics and GDPa Antibody Developability Dataset Series

 Community Article

Published June 24, 2025



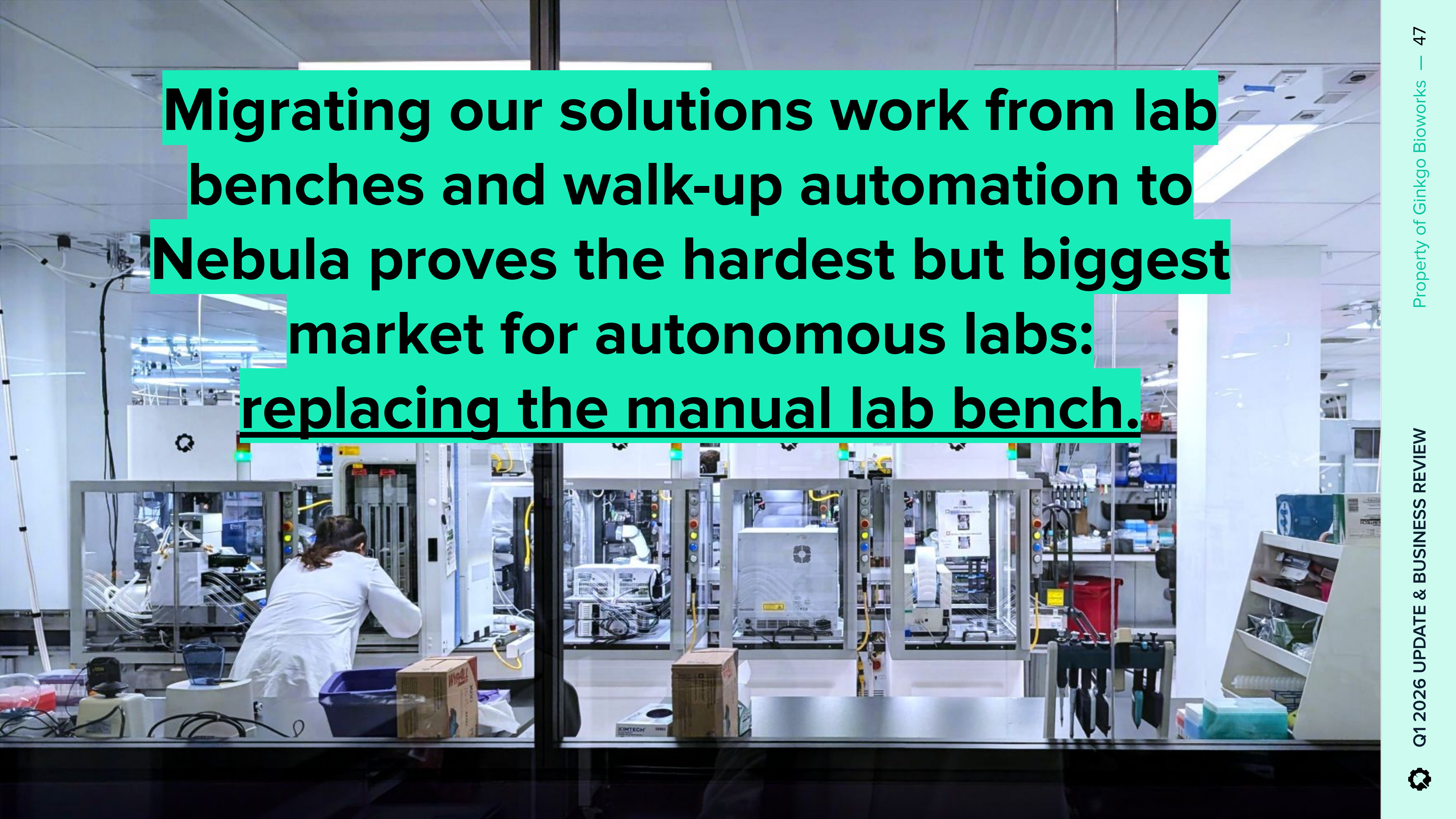
Our solutions business spans a huge range of biotech lab work

	PHARMA	INDUSTRIAL BIOTECHNOLOGY				AGRICULTURE
LARGE COMPANIES						
STARTUPS						

Note: Logos are customers (shared with permission); this is not an exhaustive list.



Migrating our solutions work from lab benches and walk-up automation to Nebula proves the hardest but biggest market for autonomous labs: replacing the manual lab bench.



Come visit!!!

<https://calendly.com/ginkgo-bio/tour-ginkgo>





**Let's grow the world
we want to see**

jason@ginkgobioworks.com



Agenda

Introduction

Jason Kelly, Co-Founder and CEO

Q3 2025 Financial Update

Steve Coen, CFO

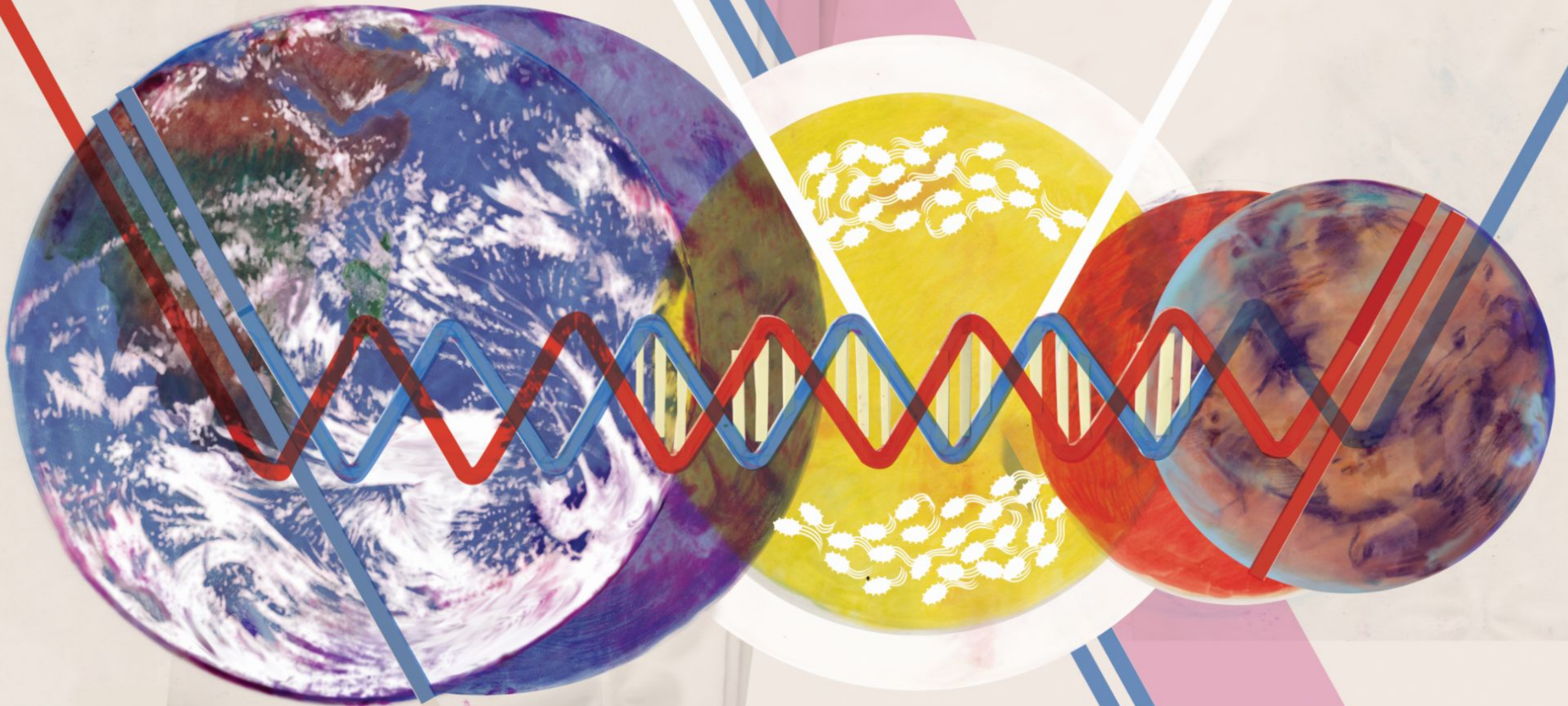
Strategic Review

Jason Kelly, Co-Founder and CEO

Q&A Session

*Moderated by Daniel Marshall, Sr. Manager of
Communications and Ownership*

APPENDIX



Adjusted EBITDA Reconciliation (Unaudited)

<i>In millions of USD</i>	Three Months Ended March 31,	
	2026	2025
Net loss from continuing operations ⁽¹⁾	\$ (76.1)	\$ (83.3)
Interest income, net	(3.6)	(6.1)
Income tax (benefit) expense	(0.1)	0.1
Depreciation and amortization	12.8	14.8
EBITDA	\$ (67.0)	\$ (74.5)
Stock-based compensation ⁽²⁾	16.7	17.7
Restructuring charges ⁽³⁾	(0.0)	4.5
Merger and acquisition related expenses ⁽⁴⁾	0.0	(0.9)
Loss (gain) on investments	1.2	3.7
Change in fair value of notes receivable	6.8	5.3
Adjusted EBITDA	\$ (42.3)	\$ (44.2)

1) All periods include non-cash revenue when earned, including \$7.5 million recognized in the three months ended March 31, 2025, recognized pursuant to the termination of revenue contracts with Biomedit.

2) Includes \$0.9 million and \$0.4 million in employer payroll taxes for the three months ended March 31, 2026 and 2025, respectively.

3) Restructuring charges primarily consist of employee termination costs from the reduction-in-force commenced in June 2024 and substantially concluded by December 31, 2025.

4) Represents transaction and integration costs directly related to mergers and acquisitions, including: (i) legal, consulting and accounting fees associated with acquisitions, (ii) post-acquisition employee retention bonuses, (iii) (gain)/loss from changes in the fair value of contingent consideration liabilities resulting from acquisitions, and (iv) securities litigation costs. Not included in this adjustment are acquired in-process research and development expenses, which totaled zero for both the three months ended March 31, 2026 and 2025, respectively.

Cash Burn Reconciliation (unaudited)

<i>In millions of USD</i>	Three Months Ended March 31,	
	2026	2025
Net decrease in cash, cash equivalents and restricted cash	\$ (24)	\$ (250)
Net increase (decrease) in marketable securities	25	(191)
Cash Flow	(49)	(59)
Net proceeds from ATM	0	0
Transfers to Restricted Cash	(1)	(1)
Cash Burn ⁽¹⁾	\$ (48)	\$ (58)

(1) Cash burn is defined as change in GAAP cash, cash equivalents, and marketable securities excluding Company imposed cash restrictions, as adjusted for unrealized equity gains and losses. Cash burn excludes net proceeds from ATM sales.

Cash Burn Reconciliation (unaudited)

<i>In millions of USD</i>	Twelve Months Ended December 31,	
	2025	2024
Net decrease in cash, cash equivalents and restricted cash	\$ (393)	\$ (383)
Net decrease in marketable securities	235	0
Cash Flow	(158)	(383)
Net proceeds from ATM	19	0
Transfers to Restricted Cash	(6)	0
Cash Burn ⁽¹⁾	\$ (171)	\$ (383)

(1) Cash burn is defined as change in GAAP cash, cash equivalents, and marketable securities excluding Company imposed cash restrictions, as adjusted for unrealized equity gains and losses. Cash burn excludes net proceeds from ATM sales.

