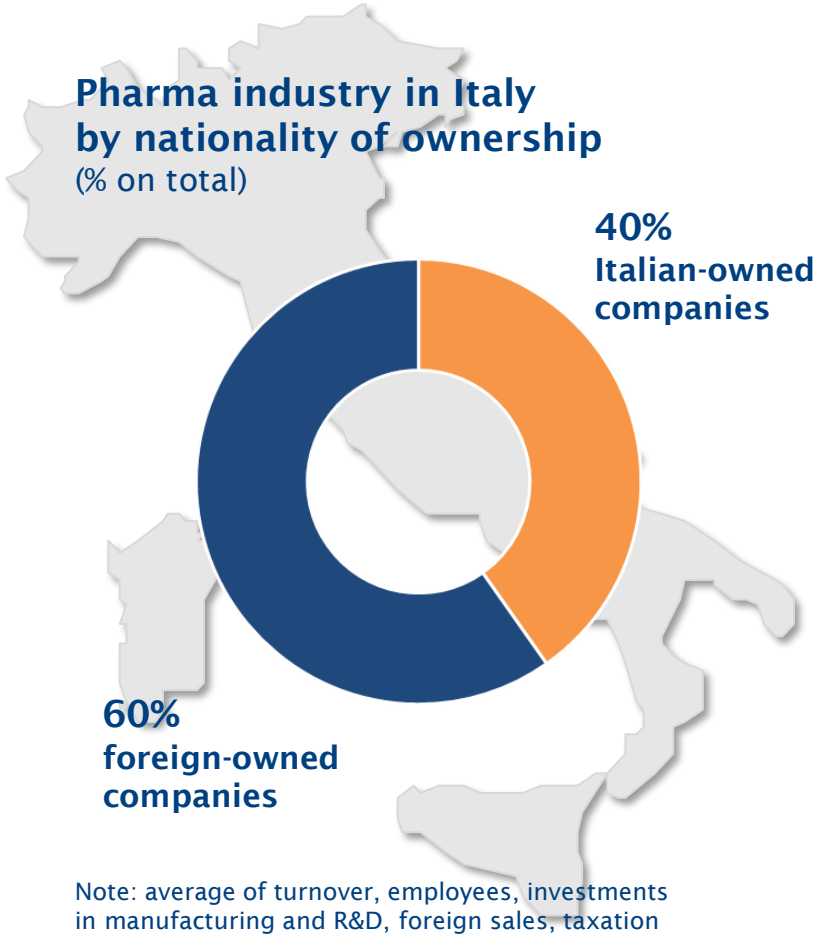
The pharmaceutical Industry in Italy
Facts and Figures

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Key figures of the Pharma Sector in Italy



Note: average of turnover, employees, investments in manufacturing and R&D, foreign sales, taxation

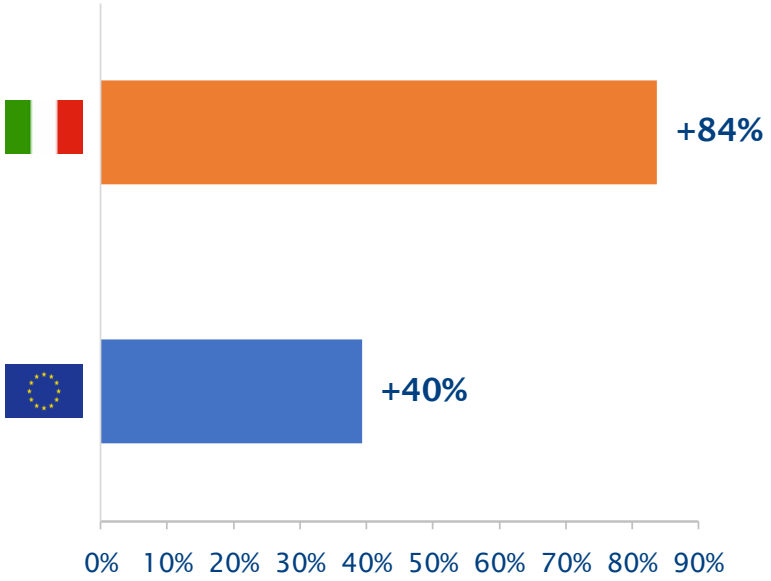
- **200 companies**, representing 95% of turnover in Italy
- **68,600 employees** (90% graduates), 44% women, and **150,000** in **upstream sectors**
- **6,900 R&D employees**, 53% women
- **€ 49** billion of **manufacturing value**, **€ 47.6** billion of **export**
- **€ 3.3** billion in **investments**, €1.9 of which in R&D and €1.4 in hi-tech plants and machinery

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Source: elaboration of Istat, Eurostat, Efpia, Farmindustria data

Italy plays a role of Leadership in EU for Production, thanks to Export, the Engine of Pharma Companies

Medicines value of export: trend 2017-2022
(% change)



With a production value of **€ 49 bln**, pharmaceutical companies in Italy have a role of **leadership** in the EU, thanks to export (+176% from 2012 to 2022, more than EU27 average) and thanks to the quality of the supply and service chain

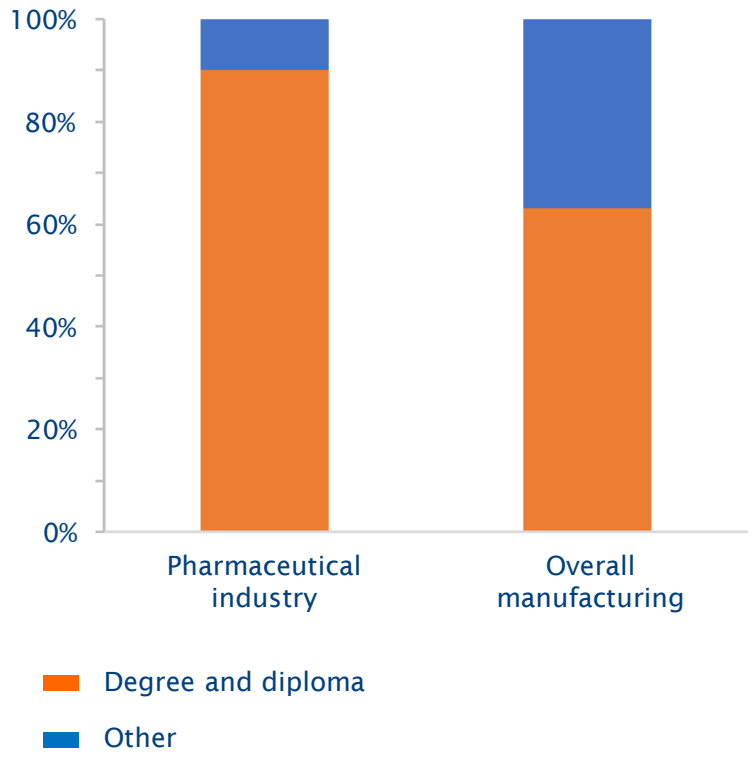
From 2017 to 2022 the **average value of medicines export grew by +84%**, which is another indicator of innovation and quality of production in Italy

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Source: elaboration of Istat, Eurostat, Efpia data

Human Resources, the main competitive Factor

Employment in the Pharma industry in Italy by educational level
(% of total)



The **quality of Human Resources** is the main competitive advantage for pharma companies and their investments in Italy

In 2017-2022 employment in pharma industry **grew by 9.2%**, mainly in production and R&D.
The **highest growth** compared to overall economy (+1.6%)

Source: elaboration of Istat, Farmindustria data

Pharmaceutical Industry in Italy confirms its positive contribution to the economy with production, exports and employment also in 2023

Production January-September 2023/2022

- Pharmaceutical Industry: +9,0%
- Other Countries
  Germany -0,6%, France -1,6%, Belgium -22,5%, Spain +10,5%

Export January-September 2023/2022

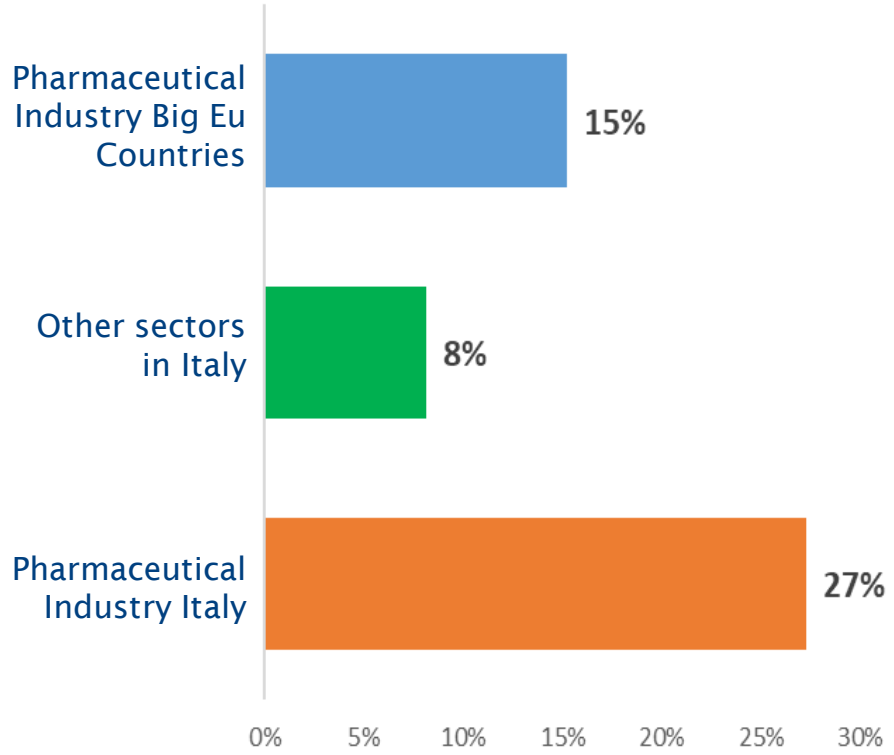
- Pharmaceutical Industry : +5,1% (trade surplus +8,7 billion €)
- Other Countries
  Germany -5,8%, France -0,1%, Belgium -17,6%, Spain +3,2%

Employment January-September 2023/2022

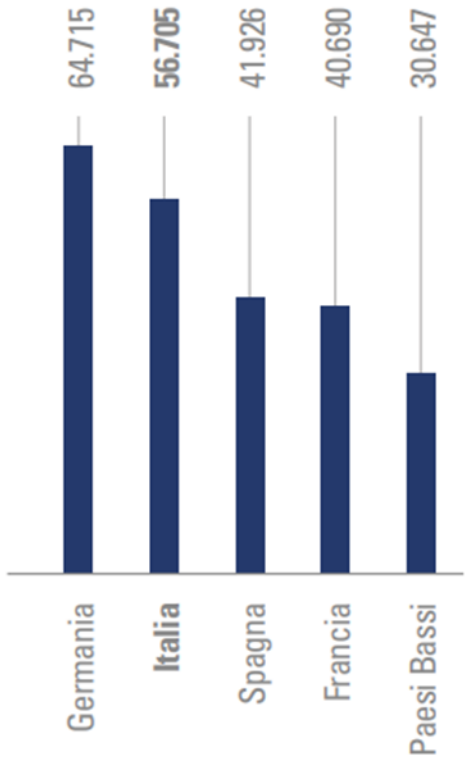
- +2%
- +9% from 2017 to 2022 (+15% young people and women)

Growing R&D Investments and Strategic Role for the Ecosystem

Patent applications: % change 2022/2019



Publication in Life Science



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Source: Farmindustria on EPO, TEHA

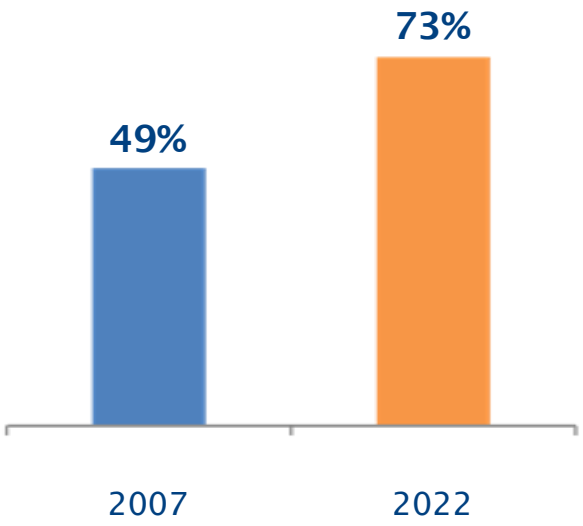
Double-digit growth for R&D investments in Italy in the last years

- **€ 3.3 billion invested in R&D and Innovation**
  - +22% for R&D between 2017-2022
  - +95% for partnerships R&D in the last 5 years
- **Worldwide Excellence for Biotech, vaccines, blood derivatives, orphan drugs, advanced therapies**
- **Increasing role for clinical studies (€ 700+ million/year)**
  - 45% of studies on biotech products and ATMPs
  - 38% of studies on orphan drugs
  - Scientific expertise and excellences in Industry, University and NHS

Source: elaboration of Istat, Aifa, Farmindustria data

Italian-owned Pharma Companies in Italy: Performances beyond the Manufacturing Average

Foreign sales of Pharmaceutical Italian-owned companies
(% of overall turnover)



Among Italian-owned companies, the pharmaceutical ones have **added value and investments in production and R&D per employee higher than the average**

This structural features allow companies to expand to new markets: more than **70% of total revenue** is generated by foreign sales

Biggest Italian Groups

14 billion € turnover 44,000 employees

11% R&D/turnover in line with EU average in Pharma sector

+58% R&D cumulative growth 2019-2022 (> that EU average, +20%)

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Source: elaboration of Istat, Famindustria data

Pharma in Italy: many Actors, many Opportunities for Investments



- A **strong and historical presence in the country, with more than 180 production sites**
- A **balanced mix** between Italian and foreign-owned companies, with **small, medium and large firms**
- Many different companies, **many specializations**: medicines, vaccines, biopharma, advanced therapies, plasma derivatives, CDMO, Active ingredients, nutraceuticals, …
- An **upstream sector of excellence in production and R&D**

Many opportunities to invest, to enter the Italian and EU markets with high-quality partnerships