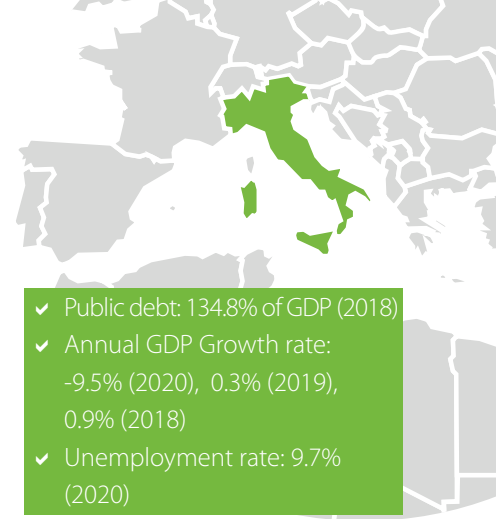


inrals Intel - Focus on Italy



General situation in Italy



Inhabitants



US \$ 33.228

Per capita GDP (2019)

- ✓ Public debt: 134.8% of GDP (2018)
- ✓ Annual GDP Growth rate: -9.5% (2020), 0.3% (2019), 0.9% (2018)
- ✓ Unemployment rate: 9.7% (2020)

Pharmaceutical and Life Science Industries in Italy

- ✓ Life Sciences is a Key Strategic Industry in Italy, especially from manufacturing side
- ✓ The total R&D investment in the industry was € 5 Billion in 2020
- ✓ The total production value was € 55,3 billion in 2020, of which 85% for export
- ✓ Total number of people employed in the sector is 174,000
- ✓ Italian Life Science companies are still mostly family owned ones and many of them have started to internationalize their business many years ago



Number one pharmaceutical manufacturer in Europe

Key cluster figures (2020)



Pharma

291 firms; Production value € 32.2 Bn; Research & Development investment € 1.65 Bn; 66.500 employees



Biotech

696 firms; Production value € 12.1 Bn; Research & Development investment € 2.3 Bn; 13.313 employees



Medical Devices

4.323 firms; Production value € 11 Bn; Research & Development investment € 0.934 Bn; 94.153 employees

Highly qualified industry



The quality of Human Resources in the pharmaceutical industry is the first among the competitiveness factors of our country reported by businesses. 90% of pharmaceutical workers have a degree or diploma, a significantly higher share than the industry average.

Productivity, investments, environment



Compared to other sectors, the pharmaceutical industry stands out for being more productive, more investments per employee (+ 310% compared to the manufacturing average), both in production, both in R&D and in environmental protection. This number is even more relevant considering that Italy does not have a proper investment policy for Life Sciences R&D.

North and center dominant



Pharma manufacturers are located mainly in north and center Italy, focused mainly on production of drugs and APIs for highly regulated markets, due to the strict regulatory and quality regulations in Italy. In the Northern region Emilia Romagna is a very important hub dedicated to Medical Devices and Pharma packaging industries.

INRALS Member: Pharma Point



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