

PHARMACEUTICAL INDUSTRY IN ITALY

FACTS AND FIGURES



FARMINDUSTRIA

MEMBER COMPANIES

A.C.R.A.F. Az Chim. Riunite Angelini Francesco | A. Menarini
Ind. Farm. Riunite | Abbvie | Abiogen Pharma | Acarpia
Farmaceutici | Adare Pharmaceuticals | Addenda Pharma
| Advanced Accelerator Applications Italy | Aeffe Farmaceutici
| Aerosol Service Italiana | Aesculapius Farmaceutici | Aesica
Pharmaceuticals | Alexion Pharma Italy | Alfa Biotech
| Alfasigma | Alk-Abelló | Allergan | Alliance Pharma | Almirall
| Altergon Italia | Amgen | Aptuit | Astellas Pharma
| Astrazeneca | Avara Liscate Pharmaceutical Services
| Bausch & Lomb Iom | Bayer Healthcare Manufacturing
| Bayer | Bial Italia | Bieffe Medital | Biogen Italia | Biologici
Italia Laboratories | Biopharma | Biotest Italia | Boehringer
Ingelheim Italia | Bracco Imaging Italia | Bristol-Myers
Squibb | Bruschetti | Bsp Pharmaceuticals | C.O.C.
Farmaceutici | Catalent Italy | Chiesi Farmaceutici | Chiesi
Italia | Corden Pharma Latina | Corden Pharma | Cosmo
| Crucell Italy | Csl Vifor | Cso Pharmitalia | D.m.g. Italia
| Daiichi Sankyo Italia | Dompé Farmaceutici | Doppel
Farmaceutici | Ecupharma | Eisai | Eli Lilly Italia | E-Pharma
Trento | Esseti Farmaceutici | Euromed | F.I.R.M.A. | Farmaceutici
Damor | Farmaka | Farmalabor | Farmila-Thea Farmaceutici
| Fatro | Ferring | Fine Foods & Pharmaceuticals N.T.M.
| Fulton Medicinali | Galapagos Biopharma Italy | Galderma
Italia | Galileo Research | Gb Pharma | Ge Healthcare | Gentium
| Gilead Sciences | Giuliani | Glaxosmithkline Manufacturing
| Glaxosmithkline | Glaxosmithkline Vaccines | Grifols Italia
| Grünenthal Italia | Guerbet | Hikma Italia | I.B.I. Giovanni Lorenzini

| I.B.N. Savio | I.Bir.N. - Ist. Bioterapico Naz. | IBSA Farma-
ceutici Italia | ICI Rende | Idi Farmaceutici | Incyte
Biosciences Italy | Industria Farmaceutica Galenica Senese
| Ipsen | Iqvia Solutions Italy | Ist. Farm. Biologico Stroder
| Istituto De Angeli | Istituto Ganassini | Istituto Gentili | Istituto
Luso Farmaco D'Italia | Italchimici | Italfarmaco | Italia | Itel
Telecomunicazioni | Janssen-Cilag | Johnson & Johnson
Medical | Kedrion | Kyowa Kirin | L. Molteni & C. F.Lli Alitti
| Laboratori Baldacci | Laboratori Guidotti | Laboratorio
Farmaceutico C.T. | Laboratorio Farmaceutico S.I.T.
| Laboratorio Terapeutico M.R. | Leo Pharma | Lifepharma
| Lofarma | Lundbeck Italia | Malesci Istituto Farm. | Mastelli
| Master Pharma | Menarini Biotech | Merck Serono | Mercurio
Pharma | Mitim | Moderna Italy | Monico | Morganceutical |
Msd Italia | Mundipharma Pharmaceuticals | Mylan Italia Srl
a Viatrix Company | Neopharmed Gentili | Nerviano Medical
Sciences | Noos | Norgine Italia | Novartis Farma | Novo Nor-
disk | Octapharma Italy | Omikron Italia | Opella Healthcare
Italy | Organon Italia | Otsuka Pharmaceutical Italy | Patheon
Italia | Pfizer Italia | Pfizer | Pharmafar | Pharmanutra | Philogen
| Piam Farmaceutici | Pierre Fabre Pharma | Pierrel | Polichem
| Polifarma | Promedica | Recordati Ind.Chim.Farm. | Recordati
Rare Diseases Italy | Roche | Sanofi | Savio Pharma Italia
| Scharper | Servier Italia | Shionogi | Sifi | Simesa | Sintesy
Pharma | So.Se.Pharm | Società Prodotti Antibiotici | Sofar
| Stewart Italia | Takeda Italia | Takeda Manufacturing Italia
| Temmler Italia | Teva Italia | Tubilux Pharma | Ucb Pharma
| Valeas Ind.Chimica E Farmac. | Valpharma International
| Vertex Pharmaceuticals | Viiv Healthcare | Vim G. Ottaviani
| Visufarma | Welcome Pharma | Wyeth Lederle | Zambon
| Zeta Farmaceutici

RESEARCH AND INNOVATION FOR PEOPLE

MORE AND MORE HOPES OF A CURE

In 2022, **64 new medicines** were authorised worldwide, compared to an average of 49 in the five-year pre-Covid period. This figure, and the 20,000 products currently being studied (a part of which will become therapies), make the **hope of a cure** for patients and increasingly personalized medicine, ever more concrete.

LIVE MORE AND BETTER

In Italy, **mortality has decreased by 28%** in 20 years and by 40% for chronic diseases. Over the last 10 years, 1 million people more have survived after being diagnosed with cancer. 260 thousand people have recovered thanks to innovative medicines against hepatitis C. Medicines treating rare diseases have gone up from 7 in 2007 to over 120 today. Vaccinations now make it possible to eradicate and control diseases, saving millions of lives. Innovative antibiotics make it possible to counteract resistant infections and many acute and chronic diseases have multiple treatments, also thanks to the growing role of advanced therapies.

CLOCK OF LIFE

In the last two years, the average life expectancy has grown by 6 months, in line with the long-term trend. A result that must be further strengthened by leveraging the potential offered by research, the appropriateness of care and the quality of the National Health Service.

OUR STRENGTH, THE PEOPLE

QUALITY EMPLOYMENT

There are **68,600** people working in pharmaceuticals, which rises to 150 thousand when considering direct suppliers. In the last 5 years, pharmaceuticals have increased employment much more than the average (+9% compared to +2% on average), thanks also to the **dynamism** and **sustainable and inclusive development models** of companies. 90% of employees are university graduates or high-school graduates. And gender equality is already a reality: 44% of employees are women (29% the average in industry), many with top roles having increased by 13% in the last five years alone.

YOUTH AND TRAINING

More and more young people. In the last 5 years the number of under 35s **have grown by 16%** and today 85% have a permanent contract. Companies acquire new skills, which grow steadily even after hiring through actions for training and professional development, in the name of multidisciplinary and soft skills.

CORPORATE WELFARE FOR PEOPLE

Pharmaceuticals stand out for corporate welfare for people: **work-life balance**, psycho-physical well-being, support for parenting, enhancement of diversity, training, healthcare and assistance to non-self-sufficient family members. Elements that facilitate productivity, for which pharmaceuticals is the first manufacturing sector.

VALUE IN ITALY FOR R&D, INNOVATION, GROWTH AND SAFETY

INDUSTRIAL VALUE

With **€ 49 billion** worth of **production**, of which € 47.6 billion in exports, the pharmaceutical industry in Italy represents a strategic asset of the economy. Leader in Europe, together with Germany and France, thanks to the growth of **exports that have increased** in the last ten years by +176%, much more than the EU average (+141%), in particular thanks to the average value of exported products.

INVESTMENT, INNOVATION AND DIGITAL TRANSITION

In 2022, investments in Italy totalled **€ 3.3 billion**, of which € 1.4 billion in high-tech plants and € 1.9 billion in R&D. Every year over € 700 million is invested in **clinical research**, aimed at hospitals, with great benefits for access to new care, growth of skills and savings for the NHS. Pharmaceuticals is the first sector for **Open Innovation**. The digital transition is racing ahead: 38% of patients use at least one App in the healthcare sector; 39% of doctors use remote-visiting services.

MORE ATTRACTIVENESS TO GROW

Between 2023 and 2028, pharmaceutical companies worldwide will invest €1.6 Trillion in R&D, the highest investment in the world. An opportunity for **growth and development** that Italy can seize on, thanks to its scientific and industrial excellence, if it implements policies to increase the attractiveness and competitiveness of the system.

ALLIES IN THE FIGHT AGAINST THE CLIMATE CRISIS

ECOLOGICAL TRANSITION

The pharmaceutical industry is committed to ecological transition. Also thanks to important investments aimed at **the efficient management** of resources: water treatment, waste reduction, the use of plastic and fossil fuels.

EFFICIENCY

In the last 10 years, the sector in Italy has **reduced energy consumption** by 37% and by 34% the consumption contributing to atmospheric emissions. There are significant results obtained from growing investments in green technologies. The differential of investments in environmental protection per employee compared to the national average is equal to +180%. This rises to 200% for those in technologies intended for pollution prevention, which eliminate or reduce pollution at the source of the production process.

CIRCULAR ECONOMY APPROACH

Pharmaceutical companies in Italy are at the forefront of the 'circular economy approach', a model that generates innovation, increases **efficiency and competitiveness** and is good for both companies, the environment and the communities in the territories in which they operate.



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