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PHARMACEUTICAL INDUSTRY IN ITALY

FACTS AND FIGURES



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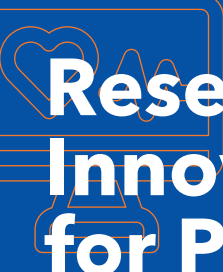
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FARMINDUSTRIA

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Research and Innovation for People



People, Our Strength



Creating Value in Italy



Leading Change

GROWING HOPE FOR TREATMENT

WORLDWIDE

78 new medicines authorized on average over the last three years (58 was the annual average in the previous decade)

23 K new medicines under development

6 lives per minute saved thanks to vaccines over the last 50 years

Growing hope for new treatments, with medicines becoming increasingly personalized for patients

LIVING LONGER AND BETTER

IN ITALY

-31% mortality over the last 25 years

-41% mortality from chronic diseases

over the last 25 years

+ 1 million people surviving after a cancer diagnosis over the last 10 years

290 k people cured thanks to innovative medicines for Hepatitis C by 2026

275+ medicines currently authorized by EMA for rare disease (there were 7 in 2007)

THE CLOCK OF LIFE

+1 year of average life expectancy over the last three years thanks to research, to more appropriate care and to quality of the National Health Service

HIGH-QUALITY EMPLOYMENT

72.200 employees

90% university graduates or high-school graduates

45% women (29% industrial average),

often in senior management positions

+10% employment vs 2019 (+6% national average)

316 K people employed, including the direct supply chain and other sectors of the value chain

YOUNG PEOPLE AND TRAINING

+25% under 35 vs 2019

Increasing involvement in training and professional development activities, with a particular focus on multidisciplinary and soft skills

CORPORATE WELFARE FOR PEOPLE

Work life balance is increasingly at the heart of companies' policy, promoting work-life balance, physical and mental wellbeing, support for parenthood and caregivers, valuing diversity, training and health

PRODUCTION AND VALUE ADDED

European leader and a strategic asset for the economy

Around 200 companies with more than 130 manufacturing sites

€ 74 billion in production value in 2025

+11% productivity above the average of the pharmaceutical industry in the major EU countries

EXPORTS

€ 69,2 billion in 2025 (+28,5% vs 2024)

+248% over the last ten years (+148% EU average)

11,3% share of Italy's manufacturing exports in 2025

€ 11,4 billion trade surplus in 2025

INVESTMENTS IN R&D AND MANUFACTURING

€ 4,4 billion invested in 2025 in Italy: € 1,9 billion

invested in high-technology manufacturing facilities and

€ 2,5 billion in R&D (including more than € 800 in hospital-based clinical research, generating benefits in access to new treatments, skills development and savings for the National Health Service)

+26% average patent applications over the last five years (+10% average in the major EU countries)

1st in Italy for Open Innovation (14:1 ratio of Open Innovation investments per employee compared with the manufacturing average)

GREATER ATTRACTIVENESS TO DRIVE GROWTH

\$ 2.1 trillion in R&D investments worldwide between 2027 and 2032. A growth opportunity that Italy must seize through attractive policies that enhance its scientific and industrial excellence

DIGITAL TRANSFORMATION

53% of Italians access their Electronic Health Record (EHR) (+13 percentage vs 2025)

62% of healthcare facilities have introduced a telemedicine consultation service

77% hospital physicians use Electronic Medical Records (EMRs)

59% of pharmaceutical companies use AI to design clinical trials

GREEN TRANSITION

Among the leading manufacturing sectors in environment sustainability initiatives, including: improved energy efficiency, use of renewable energy, reduced water consumption and eco-design of secondary packaging

-30% energy intensity over the last ten years

(-16% manufacturing average)

-37% greenhouse gas emissions intensity over the last ten years (-21% manufacturing average)