

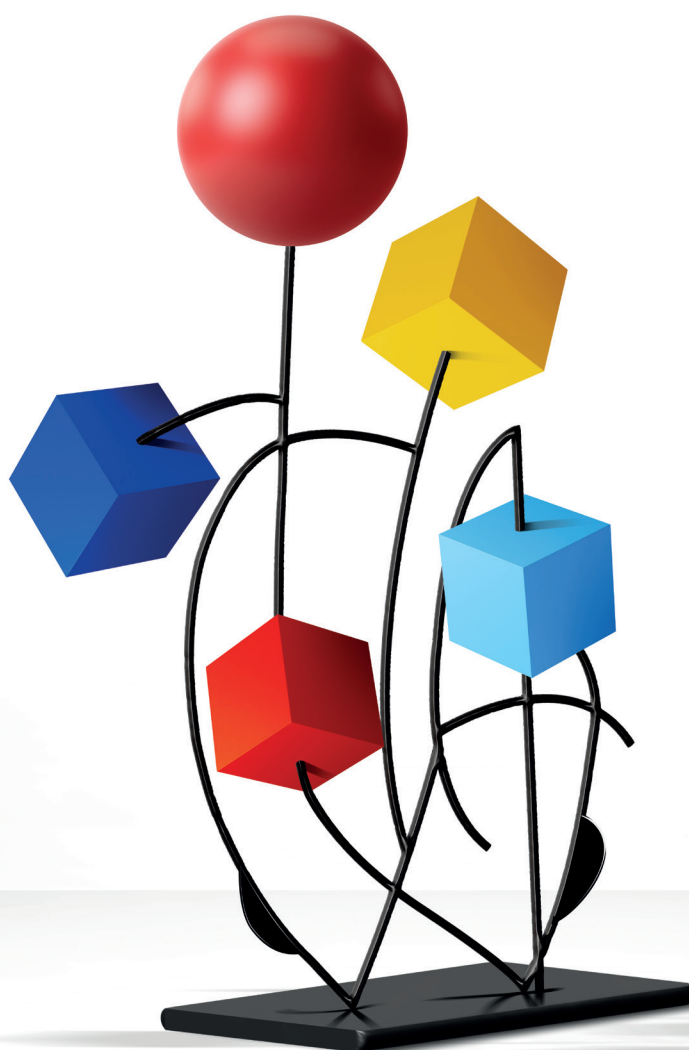
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MONITOR

PHARMA & CHEMICALS

Production and consumption of Pharma products

October 2024



JOINT VENTURE BETWEEN:



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1,476 bln. €
Global Production
Value in 2023

The worldwide value of revenues from the **pharmaceutical industry** amounts to **1,476 billion euros in 2023**. **North America** is the area of the world with the largest share, accounting for **53% of the total**, **Europe 23%** and **Asia (20% of the total)**, **Central and South America** contributes instead, **4%**.

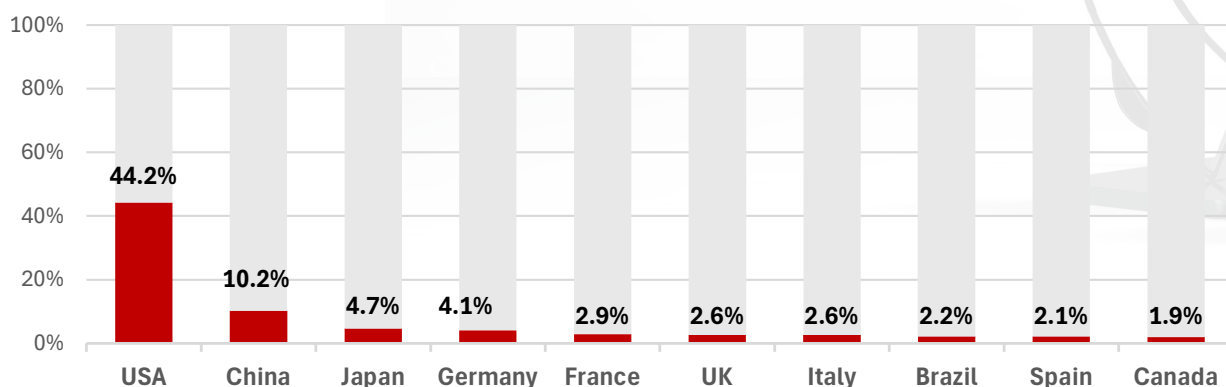


53%
Market share
in North America

Going down to the countries that contribute the most to the value of the sector, we find in **first place** the **United States** with **44.2%** of the total, **China** (with the share of **10.2%**), **Japan** with **4.7%**, **Germany** (**4.1%**), **France** (**2.9%**), **United Kingdom** and **Italy** with the share of **2.6% each**. Last on the list are **Brazil** (**2.2%** share of the total), **Spain** (**2.1%** share) and **Canada** with **1.9%** share of the total.

The key words for the future of the pharmaceutical sector in the world are **Research and Development**, in fact, the sector will be the subject, **between 2023 and 2027**, of huge **R&D investment flows** of more than **1.5 trillion euros**, aimed at best increasing the efficiency and effectiveness of the sector at the scientific and industrial level.

Pharma production
Most relevant countries
(% value of market shares)



Italian Pharmaceutical Production



2023 data



52 bln. €

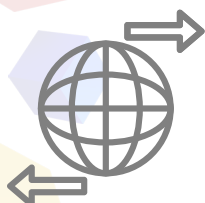
Based on the latest studies published by Farindustria, we can analyze in detail the **Italian pharmaceutical market** situation: **the production** of pharmaceutical goods in Italy is worth **52 billion euros in 2023**. **Italian exports**, worth **94.2%** of the total value, amount to **49 billion euros**.

In the past 10 years, **Italian exports** have more than doubled with a growth of **+150% from 17.2 billion to 49.1 billion euros**. It amounts to **3.6 billion euros of investment** in the Italian sector in 2023, including **2 billion euros in R&D** and **1.6 billion euros in high-tech facilities**.

In employment, there are **70,000 people employed in the sector in 2023**. Employment in the pharmaceutical sector **has grown by +9% in the past 5 years** (above the national average of +3%). **90% of the employees have a bachelor's degree**, and **45% are women** in the industry.

Italian Pharmaceutical export

2023 data



49.1 bln. €



Employment

Pharmaceutical sector in Italy in 2023

70 th. employees



Graduates



90% graduate employees

Women's share



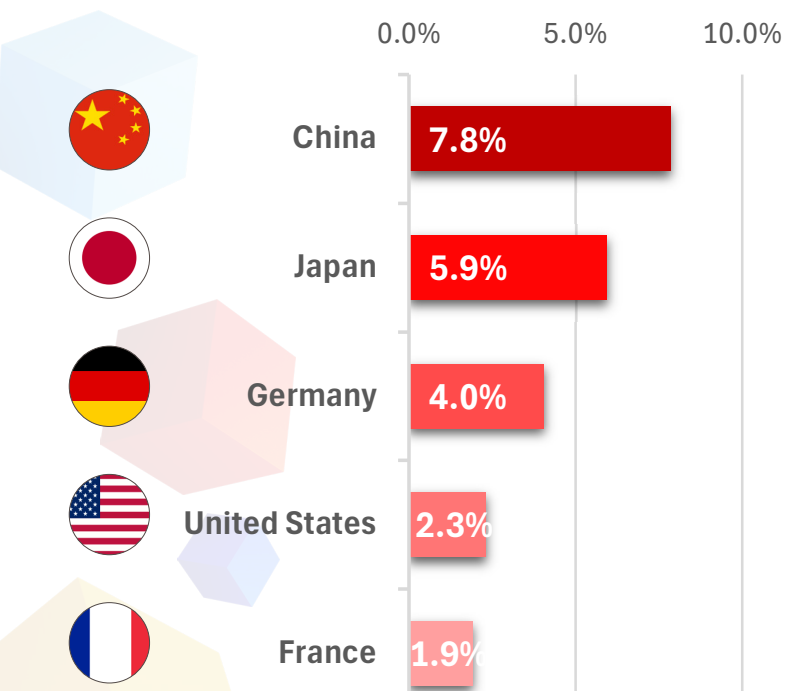
45% of women in the workforce

PHARMACEUTICAL CONSUMPTION

World market overview

World consumption of pharma products

Growth rates (CAGR 23-27)
main countries



Awareness of the importance of prevention and health care is growing in the world's population, consequently the consumption of drugs useful for this purpose is also growing. Looking at the growth dynamics that will lead to the future increase in the value of **drug consumption** in the major nations, **China** stands out, **growing at a rate of +7.8%** each year between 2023 and 2027, second is **Japan with a CAGR of +5.9%** in annual consumption, and third is **Germany** with a projected change of **+4.0%**. The **United States** and **France** close the ranking with a projected growth of **+2.3%** and **+1.9%** annually, respectively.

Also driving the growth in global drug consumption is the testing and licensing of new drugs: by 2023 there will be **90 new medicines licensed** for use worldwide, while **23,000 new drugs** are in development worldwide.

New medicines

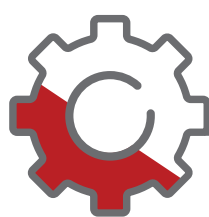
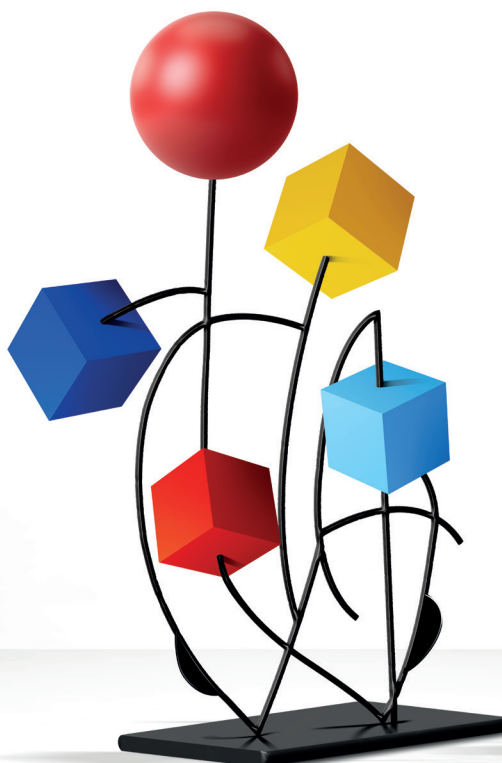


90
new approvals

New clinical trials



23th
new trials



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