

SPANISH BIOTECH ECOSYSTEM



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KEY FIGURES



TOTAL INVESTMENT (2025)

355 M€



NUMBER OF COMPANIES

862 companies¹



TOTAL INVESTMENT OPERATIONS (2025)

39



SPANISH INVESTORS IN THE BIOTECH SECTOR

51 investors



SECTOR'S WEIGHT IN GDP (2024)

1,1 %



ACCELERATORS

52



AVERAGE TURNOVER (2024)

14,6 M€



EXITS

3



R&D EXPENDITURE (2024)

1 282 M€ ↗ (+5,2%)

MAIN REGIONS

(by number of companies, enterprise value per launch year and funds raised, 2026)²

BASQUE COUNTRY

96 companies

392 M€

CATALONIA

262 companies

23 400 M€

MADRID

142 companies

1 100 M€

VALENCIA REGION

59 companies

2 300 M€

ANDALUSIA

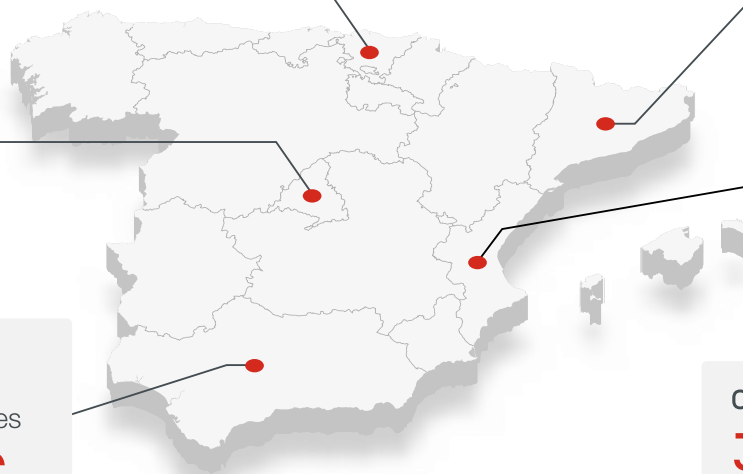
44 companies

456 M€

OTHERS

300 companies

118 000 M€



¹ Dealroom

² National Office for Entrepreneurship, Dealroom and Bankinter Foundation Startup Observatory.

WHY INVEST IN BIOTECHNOLOGY IN SPAIN?

The **biotechnology sector** has grown hand in hand with the pharmaceutical industry, and is now reaching a stage of consolidation after two decades as an emerging industry, attracting large international multinationals that have opened their R&D and production centres in Spain.

↑ SOLID BASIC SCIENCE

Spain ranks **12th worldwide and 5th in Europe in scientific output**.

↑ TOP COUNTRY IN EUROPE IN CLINICAL TESTING

Spain is the 1st country in Europe and the 3rd worldwide in terms of clinical trial development. **1 K new clinical trials underway each year in Spanish hospitals**. First EU country to adopt the European Clinical Trials regulation.

↑ OUTSTANDING PARTICIPATION IN THE INTERNATIONAL SCIENTIFIC ARENA

9th scientific power in the world and 3rd by scientific production in the EU15. 9th power in world scientific production in biotechnology with 2.5 % of the world's biotechnology output. **Publications on Spanish biotechnology are cited 21 % more than the global average**.

↑ GROWING NUMBER OF BIOTECH COMPANIES

4 500 companies involved in biotech activities and more than 860 strictly biotech. 131 000 employees, 14 % R&D activities exclusively dedicated. **In 2024 international private investors invested 64 M€ in Spanish biotech companies**. High number of strategic partnerships, 46 % with international partners.

↑ CUTTING-EDGE INFRASTRUCTURE FOR INNOVATION

Spain has around 80 science and technology parks, research centres, technological institutes and universities with state-of-the-art technology for research.

↑ HIGHLY QUALIFIED PERSONNEL

There is a surplus of talent that can be directed towards competitive and innovative projects, with **Spain being a country with a high percentage of third-level students**.

↑ PUBLIC AID

The Spanish government offers **financing and low-interest loans** during the start-up and growth phases, as well as **incentives and tax deductions** that drive growth in the sector.

↑ FAVOURABLE LEGAL FRAMEWORK FOR R&D ACTIVITIES

Company tax rate **deductions of up to 42 % for R&D investment** and up to **12 % for innovation**. 40 % deduction in social security contributions of R&D workers.

↑ AN INTEGRATED AND HIGH QUALITY SYSTEM

Spanish Healthcare System ranks 5th in the world. 840 hospitals including a high level of collaboration between healthcare centres and research projects. Public and universal service complemented by a relevant private sector. More than 60 % of private hospitals counts with outsourcing agreements with the government.

↑ IN TERMS OF MAJOR MILESTONES

Alicante-based **researcher Francis Mojica discovered the CRISPR sequences**, which has revolutionised biotechnology by enabling customised genetic editing, although he did not seek to apply it. Two foreign scientists later did so, applying the discovery to genetic editing, for which **they were awarded the Nobel Prize in Chemistry in 2020**.

↑

Another sign of the sector's strength is that **investment has grown by 460 % in less than a decade**, rising from 63.5 M€ in 2016 to 355 M€ in 2025.

SUCCESS STORIES

ORYZON

European leader in the development of epigenetics-based therapies. Its portfolio includes two compounds in Phase II clinical trials: iadademstat (ORY-1001), focused on oncology, and vafidemstat (ORY-2001Q), already in Phase III, for the treatment of neurological diseases. They also have other developments in preclinical stages. In 2014, it signed an agreement with Roche to license the rights to ORY-1001, then an experimental drug, for 380 M€ if the drug is successfully developed.



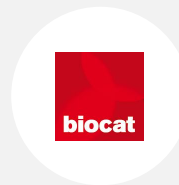
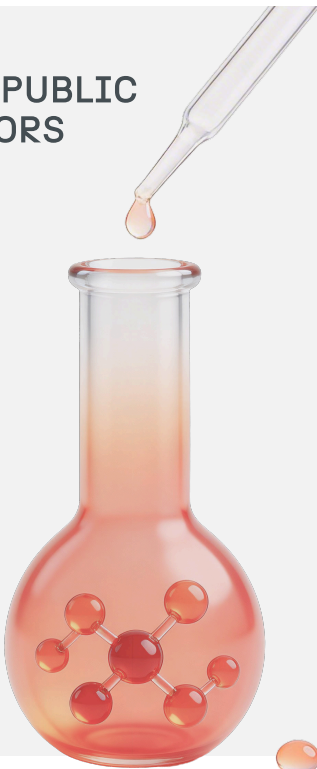
Focusing on oncology, it is an international leader in marine biotechnology. It was the first Spanish company to sign the first licensing agreement with a major international pharmaceutical company (Johnson & Johnson, Taiho Pharmaceutical). It launched the first drug developed by a Spanish biotechnology company, Yondelis, onto the market.

GRIFOLS

Europe's leading pharmaceutical company and the third largest in the world. Specialises in the blood products sector (products derived from blood plasma). It has production facilities in 15 countries across Europe, America and Oceania. It markets its products in more than 100 countries. It is listed on the Nasdaq.



KEY PUBLIC ACTORS



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