

SPANISH PHARMACEUTICAL ECOSYSTEM



NIPO: 224260343

Contact us

Invest in Spain /// Tel: + 34 913 49 71 00

www.investinspain.org/en/contact-us

SPANISH PHARMACEUTICAL ECOSYSTEM

KEY FIGURES



SECTOR'S WEIGHT IN GDP (2025)

~2 %



GENDER DIVERSITY

53 % female employment overall and **67 %** women in R&D



R&D EXPENDITURE (2025)

1 775 M€ + 40 % increase over the last 5 years



TOTAL VALUE ADDED

27.2 B€



TOTAL FDI PROJECTS (2025)

12 FDI Markets



DIRECT EMPLOYMENT

60 600 qualified professionals



NUMBER OF PRODUCTION PLANTS (2024)

181 111 dedicated to human-use medicines



EXPORT VOLUME (PHARMACEUTICAL PRODUCTS)

17 B€ annually



TOTAL INVESTMENT FLOW (2024)

0.7 B€



TOTAL EMPLOYMENT IMPACT

242 000 jobs



FDI STOCK (2007-2024)

3.5 B€

MAIN REGIONS

(by number of production plants, 2024)

BASQUE COUNTRY

8

4 %

CASTILE-LEÓN

15

8 %

CATALONIA

79

44 %

MADRID

39

22 %

OTHERS

7 new plants opened across Valencia Region, Castile-León, Murcia, and the Basque Country

WHY INVEST IN BIOTECHNOLOGY IN SPAIN?

The Spanish pharmaceutical sector has evolved into a high-technology sovereign asset. Positioned as a leading European bio-foundry, Spain offers a stable, high-excellence, and deeply innovative environment that is highly attractive for international life sciences investment.

TOP COUNTRY IN EUROPE IN CLINICAL TESTING

Spain has solidified its status as the premier European benchmark for clinical research, currently ranking 1st in Europe and 3rd worldwide in clinical trial activity. Spanish centers now participate in 45.6 % of all trials authorized in the EU via the Clinical Trials Information System (CTIS), reflecting a level of regulatory and scientific agility that few global peers can match.

STRONG MACROECONOMIC IMPACT AND HIGH PRODUCTIVITY

The pharmacological sector is a fundamental economic engine, generating over 27.2 B€ in added value, which equals 2 % of the national GDP. It stands out as the second most productive manufacturing activity in Spain, generating 94 € of added value per hour worked, which is more than double the industrial average.

FAVORABLE PUBLIC AID AND REGULATORY FRAMEWORK

The Spanish government actively incentivizes the sector through programs like the Profarma Plan 2025-2026, which grants companies reductions of up to 25 % in their mandatory financial contributions to the National Health System based on their industrial and R&D excellence. An additional 10 % bonus is also available for companies participating in basic and preclinical research consortia.

HIGHLY QUALIFIED PERSONNEL AND DIVERSE WORKFORCE

Investors benefit from a vast pool of top-tier talent, as the sector supports between 242 000 and 270 000 jobs across the country. The R&D workforce is exceptionally skilled, with 90 % holding university degrees, and the sector leads the way in equality, with women making up 53 % of all employees and 67 % of R&D departments.



SUCCESS STORIES

COFARES Grupo Cofares grew a 100 % Spanish pharmaceutical cooperative into the undisputed national leader and the fourth-largest pharmaceutical distributor in Europe. It holds nearly 30 % of the national market share and achieves continuous financial growth, reaching record-breaking sales of 4.58 B€ in 2025. It is the only distributor with a physical presence across all of Spain. Operating 48 warehouses and deploying over 2 400 daily delivery routes, it manages more than 442 M units of medicine annually. It successfully competes head-to-head with international corporate giants (like Celesio and Alliance Healthcare) while fulfilling a vital public service: guaranteeing secure, daily access to medicines for over 49 M people across both urban and rural areas.

REIG JOFRE Reig Jofre is a pharmaceutical company founded in 1929 in Barcelona dedicated to the research, development, manufacturing, and marketing of pharmaceutical products and nutritional supplements. Reig Jofre has more than 1 000 employees, 4 development and production centers in Europe (2 in Toledo, 1 in Barcelona, and 1 in Sweden), direct sales in 7 countries, and more than 130 commercial partners across 70 countries worldwide. The company structures its product development activity into three main business units:

- Pharmaceutical technologies: Specialized in the development and manufacturing of sterile and lyophilized injectable pharmaceutical products, as well as penicillin-derived antibiotics.
- Specialty pharmacare: Focused on the research, development, manufacturing, and marketing of specialties in the areas of Dermatology, Osteoarticular, and Women's Health.
- Consumer healthcare: Specialized in nutritional supplements in the area of prevention and well-being, as well as topical disinfectants with a complete range of alcohols.



Laboratorios Rovi is a specialized pharmaceutical company dedicated to the research, development, manufacturing, and marketing of pharmaceutical products. Rovi operates through three main business units:

- Pharmaceutical specialties: A diversified portfolio consisting of about thirty of its own products, as well as products marketed under license.
- Third-party manufacturing: They have three manufacturing plants for third parties (two dedicated to injectables and another specialized in solid forms). They were notably responsible for producing the Moderna vaccine.
- R&D: A reflection of this innovation and development policy is the success of Bemiparin, the first second-generation low-molecular weight heparin, which has become the company's flagship product and is currently marketed in more than 55 countries.

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



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



The company's facilities in Barcelona and Alcalá de Henares play an important role in manufacturing, research, and commercial activities, while its plant in Asturias is one of Bayer's key global sites for the production of acetylsalicylic acid, the active ingredient used in Aspirin, which is exported to eight production centers.

SUCCESS STORIES



Boehringer Ingelheim, German company with a strategic presence in Spain, established since 1952 and mainly centered in Sant Cugat del Vallès (Barcelona), where its corporate headquarters and two industrial plants are located. In addition, the company has three centers that support the entire global group: a Regulatory Affairs center, an IT Hub (specialized in cybersecurity and networks), and a Digital Hub focused on communication with customers and patients.



Strong R+D investments in Spain with its Global Innovation Hub in Barcelona. Consequently, Spain has become one of AstraZeneca's key European locations for innovation and clinical trials, reinforcing its strategic role within the company's global network.



Manufacturing plant, unique within the group and one of the company's most advanced facilities worldwide, for recombinant drugs for the treatment of hemophilia. It has also been designated as the conditioning and distribution center for gene therapies for Europe, Latin America, and Canada. The company recently allocated 100 M€ to this plant for the construction of a new highly automated sterile manufacturing area.



Reference research centre for tropical diseases, Molecular Discovery Research and Drug Discovery activities located in Tres Cantos. Moreover, the company's global vaccines manufacturing facility in Aranda de Duero is one of its most advanced plants worldwide, exporting vaccines to numerous countries.



KEY PUBLIC ACTORS

