

Catalonia Connects to Life Sciences

Life Sciences live a healthy life in Catalonia

With a pharma industry as a historical driver of the local economy, life sciences activities account today for 7.1% of Catalan GDP, have an annual turnover of €15,956 M, and employ some 46,676 people in over 871 companies, according to Biocat.

Since 2010, **50 new companies are set up yearly in the Catalonia's Bioregion**, meaning that **every eight days a life and health sciences company opens**. Furthermore, these companies have an extremely high survival rate, given that over the last five years only one company closure is registered per year.

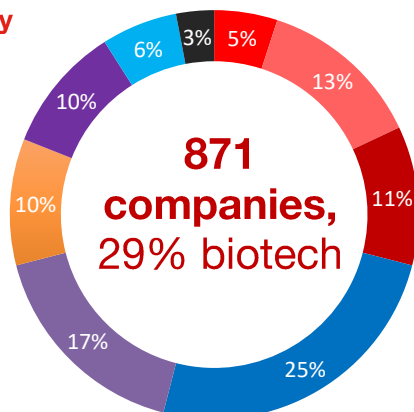
Catalonia, a great place for international pharmaceutical companies

Within the context of Spain, Catalonia concentrated **47% of Spanish pharmaceutical industry** (2014) and **36.6% of Spanish pharmaceutical exports** (2006-2016).

Catalonia, as the leading and birthplace region of **pharmaceuticals** in Spain, is home to the five biggest Spanish pharmaceutical companies: Almirall, Esteve, Ferrer, Grifols and Uriach. Catalonia is also home of Lacer, Indukern, Salvat and Isdin, and to the main API companies in the country. Furthermore many international companies have established here, such as Novartis, Sanofi, Boehringer-Ingelheim, Bayer, Roche, Menarini, Pierre Fabre, BBraun, GE Healthcare, Zoetis, Otsuka, Invent Farma, Intas Pharmaceuticals, AstraZeneca, Synthon or Angelini, to mention just a few.

Industry diversity

Source: Biocat



Catalan and international medtech companies

Catalonia leads the distribution of medical devices production in Spain, with a 42% of total production. **Health Technology industry** in Catalonia combines local companies -Phibo, BioSystems, Deltalab, Stat-Diagnostica, Avinent, Grifols or Texpol- and leading medical devices companies. Among these last ones we can find Olympus, Roche Diagnostics, Hartmann, Werfen-Biokit, Dako-Agilent, BBraun, Siemens, GE Healthcare, Stryker, Siemens, Boston Scientific, Hologic, Gore, Menarini Diagnostics, Azbil, Johnson&Johnson or Zimmer.

The biotech connection

Catalonia is the **leading biotech region** in Spain, holding 19.4% of Spanish biotechnological industry and several biotech companies such as Amgen, Inkemia, AB-Biotics, Biokit, Salvat, Reig Jofre, Oryzon, Advancell, Gendiag, ReadyCell, Bionure, Alexion, GP Pharm, Endor or Lipotec are part of the biotech industry in Catalonia. Since biotech and pharma are increasingly more interrelated industries, the importance of the Catalan biotech sector is another asset for pharmaceutical companies to set up in Catalonia.

Catalonia is amongst Europe's most powerful regions in terms of the biotech sector, and that it has managed to position itself on the international stage.

Albert Barberà, Biocat's CEO

- Biotech - Therapeutics & Diagnostics
- Biotech - R&D Services
- Biotech - other
- Suppliers and Engineering
- Professional services & consulting
- Medical Technology
- Healthtech
- Pharma
- Investment entities



Catalonia's active research climate gives added dynamism to the life sciences sector

Catalonia has **41 research centres** working in life sciences or related disciplines (photonics, nanotechnology, etc.). These centres have formed over **780 active research groups** and more than **360 research projects** in main areas of bioinformatics, genetics/genomics and nanotechnology and in the therapeutic areas of cancer and neurodegenerative diseases. (Biocat, 2016). These research centres have a combined workforce of 11,000 people, 5,660 of which are researchers, and the 18 Catalan **university hospitals** have more than 5,000 researchers devoted to biomedical research. The recognition of 6 Catalan research centres as "Severo Ochoa" centres of excellence, out of a Spanish total of 14, showcases the level of the Catalan research system.

- **Centre for Genomic Regulation
Barcelona Biomedical Research Park**
- **Biotechnology Cluster - CATALONIABIO
Health Technology Cluster**
- **Biocat coordinates and promotes the
healthcare and life sciences sector in
Catalonia.**

An advanced clinical trials research network

Barcelona Clinical Trials Platform (BCTP) is a strategic instrument promoted by the Government of Catalonia to improve the coordination, integration, quality, and speed of clinical trials. Their member institutes include 7 university hospitals with overall clinical research capacity of 5 million patients and 2,000 investigators to which BCTP provides a single point of access. Currently, more than 2,500 trials are ongoing, either in one site or across multiple sites. Catalonia accounts for 55% of the clinical trials carried out in Spain.

Strategic partnerships, JV & acquisitions

There is a **growing number alliances** between companies and R&D Centers. Both Catalan R&D centers or spin-off companies are becoming a valuable source of new discoveries for Pharma and Biotec companies.

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At the forefront of the sector's newest trends

R&D Hub for Biopharma Companies

Catalonia enables cooperation between small biotech companies (with top-level scientific projects in multiple therapeutic areas) and those pharmaceutical companies interested in such developments. In Catalonia, there are world-class research centres, hospitals and universities that are becoming the outsourcing partners within the open innovation process that pharma companies are undergoing.

Medical Technology Innovation

Changing demographics and the increasing prevalence of chronic diseases are driving the demand for high-quality medical devices, diagnostic and imaging equipment, and innovative eHealth solutions. In Catalonia, there are 200 companies working in the field of medical technology, employing more than 11,200 people. Catalonia is becoming one of Europe's hotspots for innovation in medical technology with 48 medtech companies being set up in the BioRegion of Catalonia over the last 10 years.

3D Printing for Personalized medicine

3D printing has become the standard process already in the manufacturing of certain devices, such as hearing aids or dental implants. In Catalonia, there is the talent and the technology to develop 3D Printing applications in the field of health. A clear, differential asset is Hewlett Packard's worldwide 3D printing development centre in Sant Cugat and all the related industry that is emerging near it.

Digital Health

The management of large health data sets (Big Data), Telemedicine, electronic and mobile health (eHealth, mHealth), gamification, electronic medical histories and personal genomic sequencing are business areas being developed in Catalonia with new initiatives and local companies with innovative products and proposals. From both academia (Bioinformatics Barcelona initiative) and from the vocational training area, important work is being done to promote and strengthen the link between biology and computing. Catalonia offers a good climate to start a business in the mHealth sector: an entrepreneurship an innovative attitude, a mobile and tech friendly atmosphere (MWC – 22@ innovative district – smart city initiatives), and a deep interest and cooperation of scientists, hospitals, tech companies and government.

Increase of OTC consumer health products

Products that do not need a doctor's prescription at the point of purchase, such as nutritional supplements, oral hygiene products, cosmetic dermatological products, etc. are growing significantly. Catalonia is home to important and innovative local OTC and Beauty companies such as Puig, Isdin, Martiderm, Dermopharm and to the whole chain of suppliers, including advanced active ingredients and packaging.

Know-how, talent, infrastructures and a strategic location, make Catalonia the right place from which to operate in South European markets and beyond, including North Africa and Latin America.