

# EUROPEAN CLUSTER CONFERENCE 2022

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#EUClusterConference



# BioMan4r2 - BioManufacturing Eurocluster for Recovery and Resilience in EU

# The Medtech and Pharmaceutical industries are major contributors to the EU economy

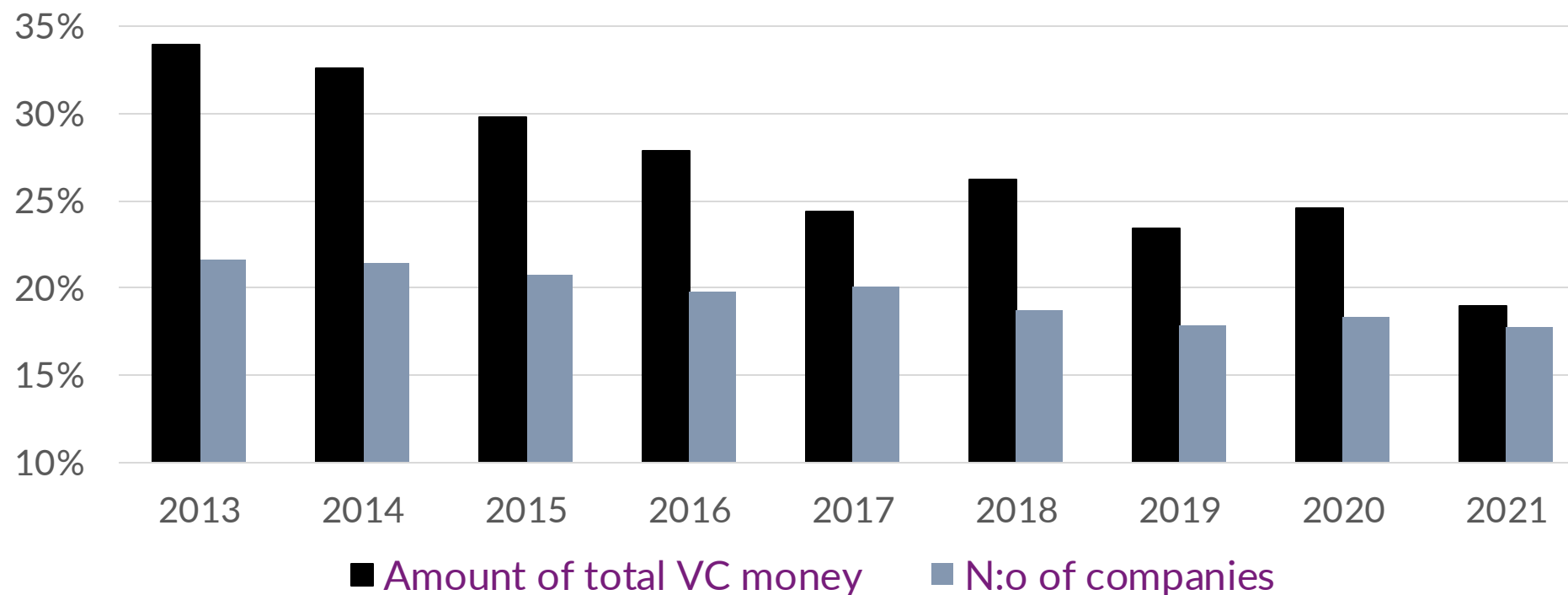
- In Europe, the Medtech sector employs more than 730,000 people.
- There are more than 32,000 medical technology companies in Europe, of which 95% are SMEs.
- The market size is estimated at roughly €120 billion

- Total pharmaceutical employment in EFPIA countries in 2021 was 840 000.
- EFPIA members spent € 41.5 bn on R&D (5-year ave. growth 4%)
- Projected pharmaceutical sales of the EU in 2025 equals to € 296 bn

# Europe's Pharma and Medtech industries are highly dependent on Asia

- Until mid-1990s the US, Europe and Japan produced 90% of the world's Active Pharmaceutical ingredients (APIs).
- China is 2nd largest supplier of APIs and antibiotics to the EU27 (in volumes). The last acetaminophen (paracetamol) manufacturing plant in Europe closed in 2008.
- There are already individual projects in Europe moving the pharmaceutical industry out of Asia; e.g. Sanofi is building a pharmaceutical raw materials manufacturing site.
- Europe should strengthen the resilience of its medical technologies supply chains for instance, by incentivising a stronger diversification of critical components, chemicals, and other raw materials needed to manufacture critical medical technologies.

# EU's VC investments to biotech & medtech decline



Not only the share of investments gets smaller but also the size of average funding rounds → life of EU SMEs in the sector gets harder

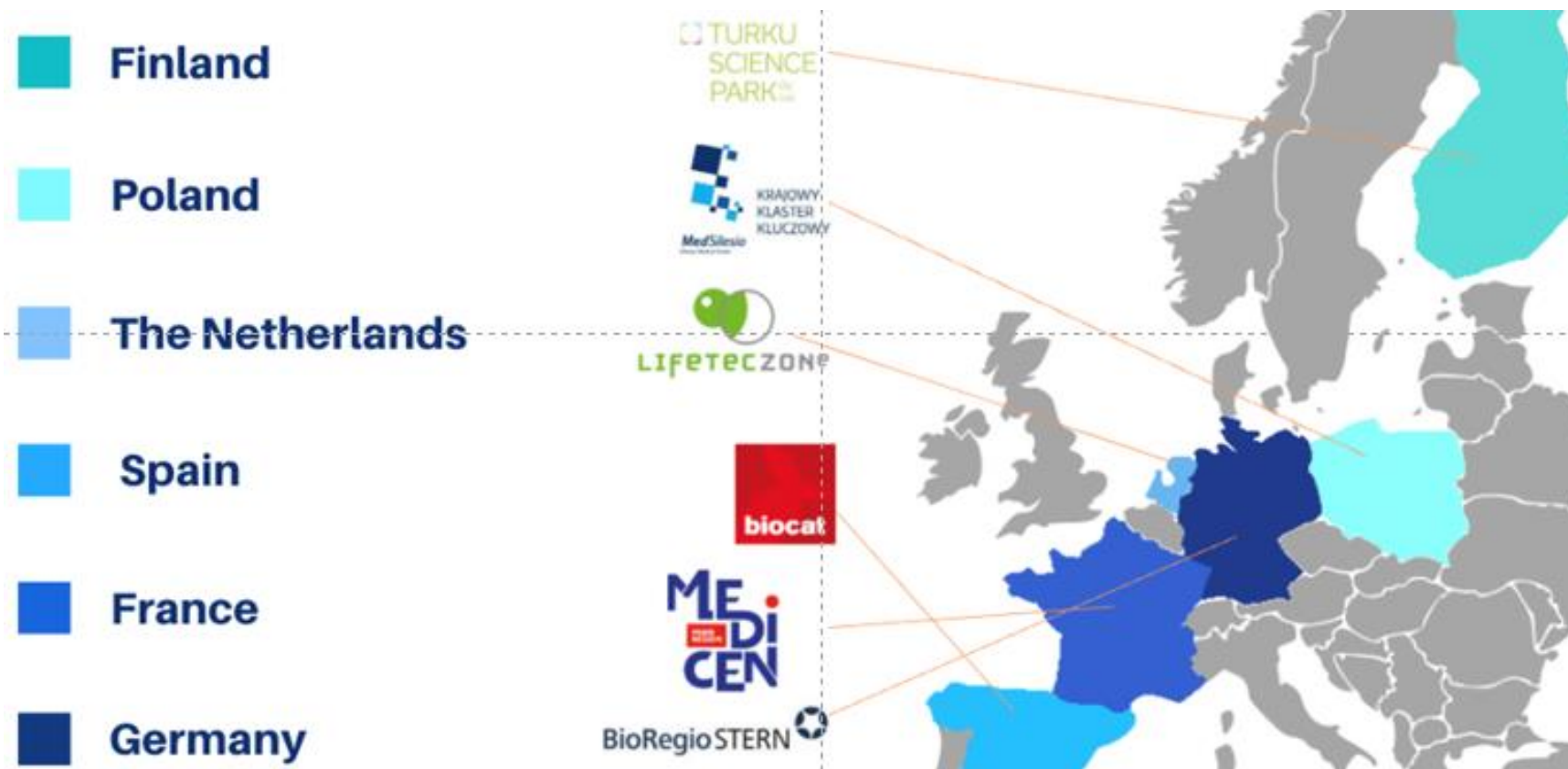
Source: InvestEurope

# How BioMan4r2 project tackles the needs

- **Long-term strategic objective** of BioMan4R2 is to contribute towards a **resilient**, circular and low-carbon **Health sector economy** through making the biomanufacturing and medtech industry (BMT) supply chains more resilient, innovative and sustainable.
- **Direct objective** is to establish, develop and support **collaboration** between the SMEs, investors, and knowledge organizations, technology parks and other companies in biomanufacturing and medtech industries through:
  - establishing a Eurocluster in Biomanufacturing and Medtech and
  - launching a targeted SME Support Programme.



# Who we are



EU Biomanufacturing survey by EIT manufacturing

# Thank you