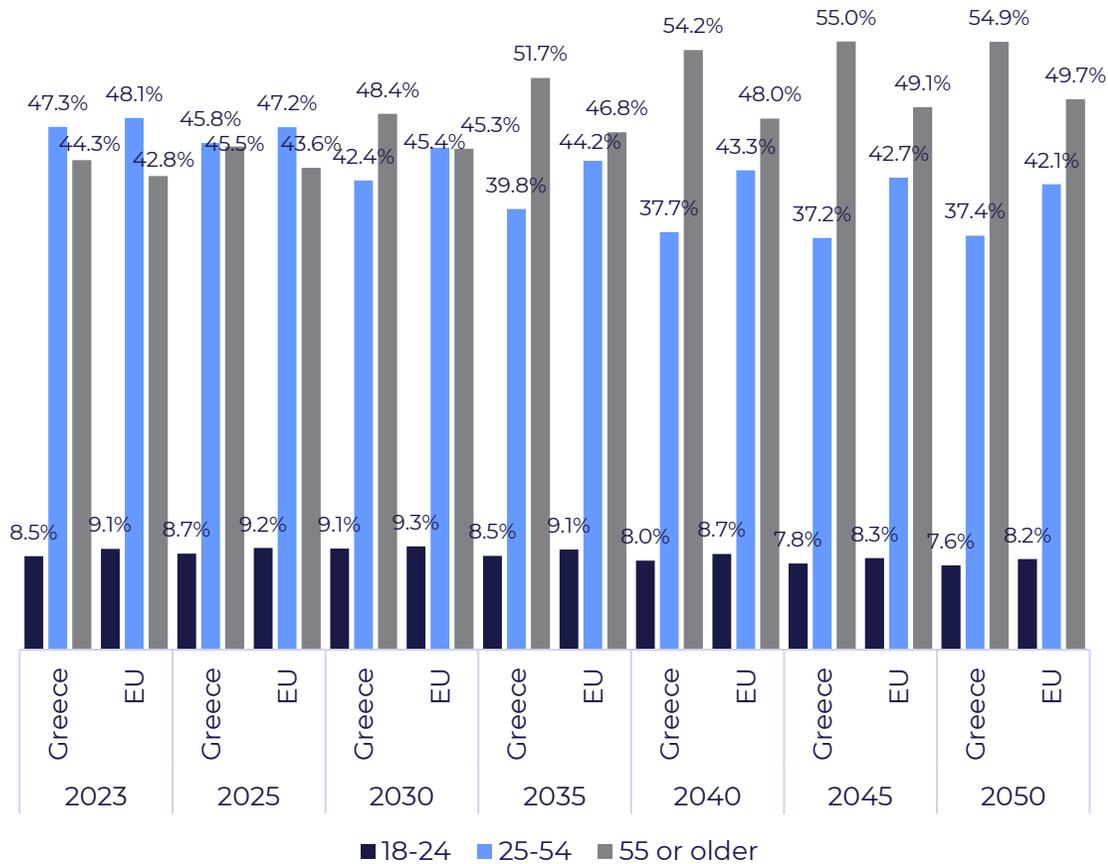


“Greek Pharma Industry by the Numbers”

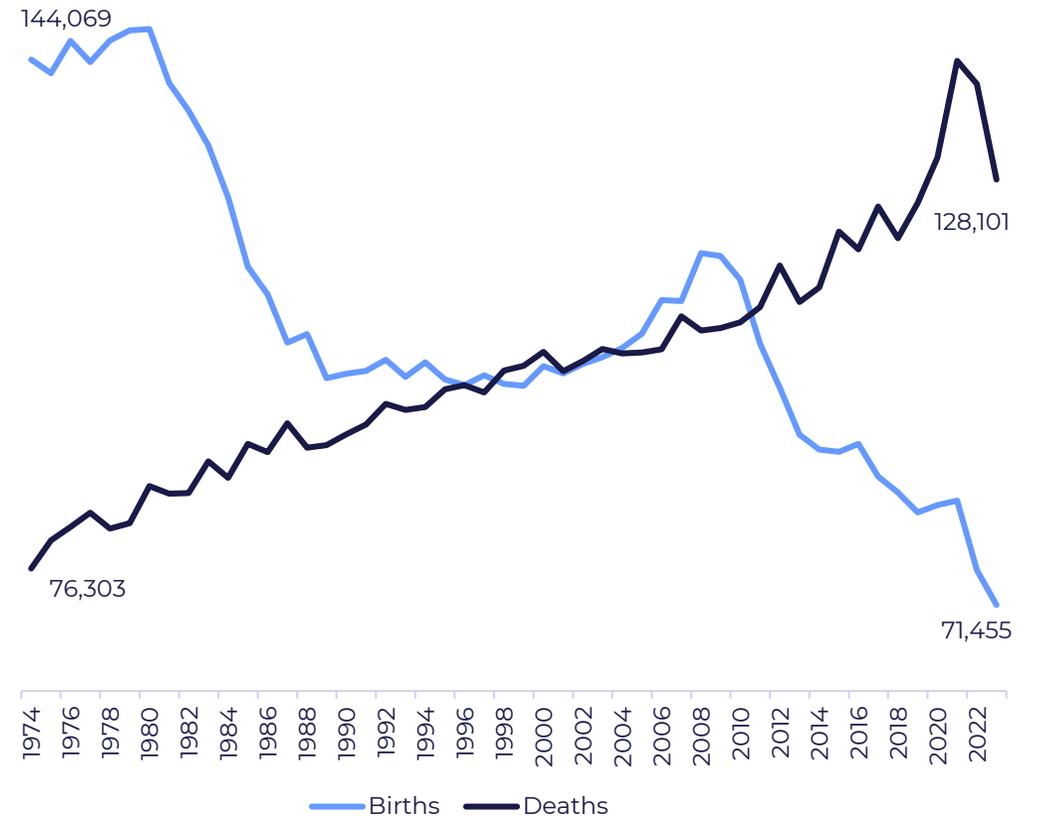
Georgios Kefalogiannis
Co-Founder & Partner
Intellectica

Demographic Trends in Greece

Demographic Age Group Projections: Greece vs. EU

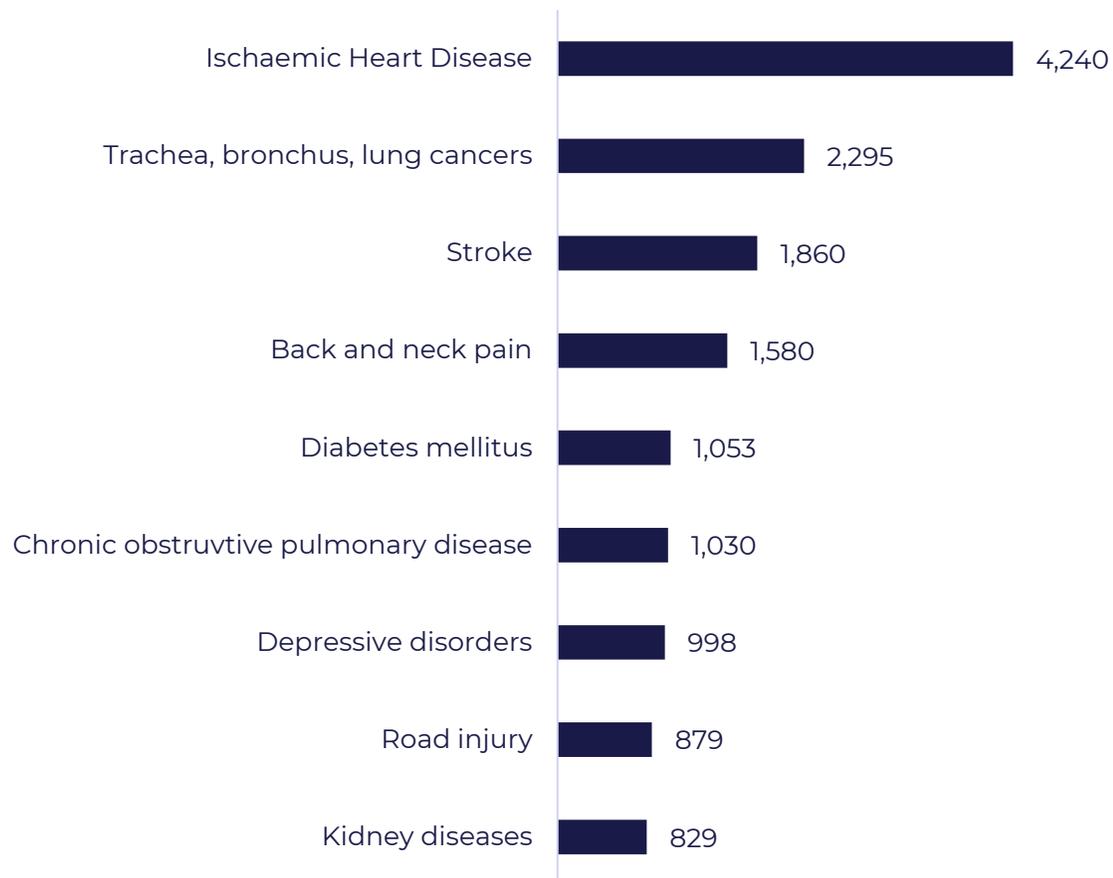


Number of Births and Deaths, 1974-2023

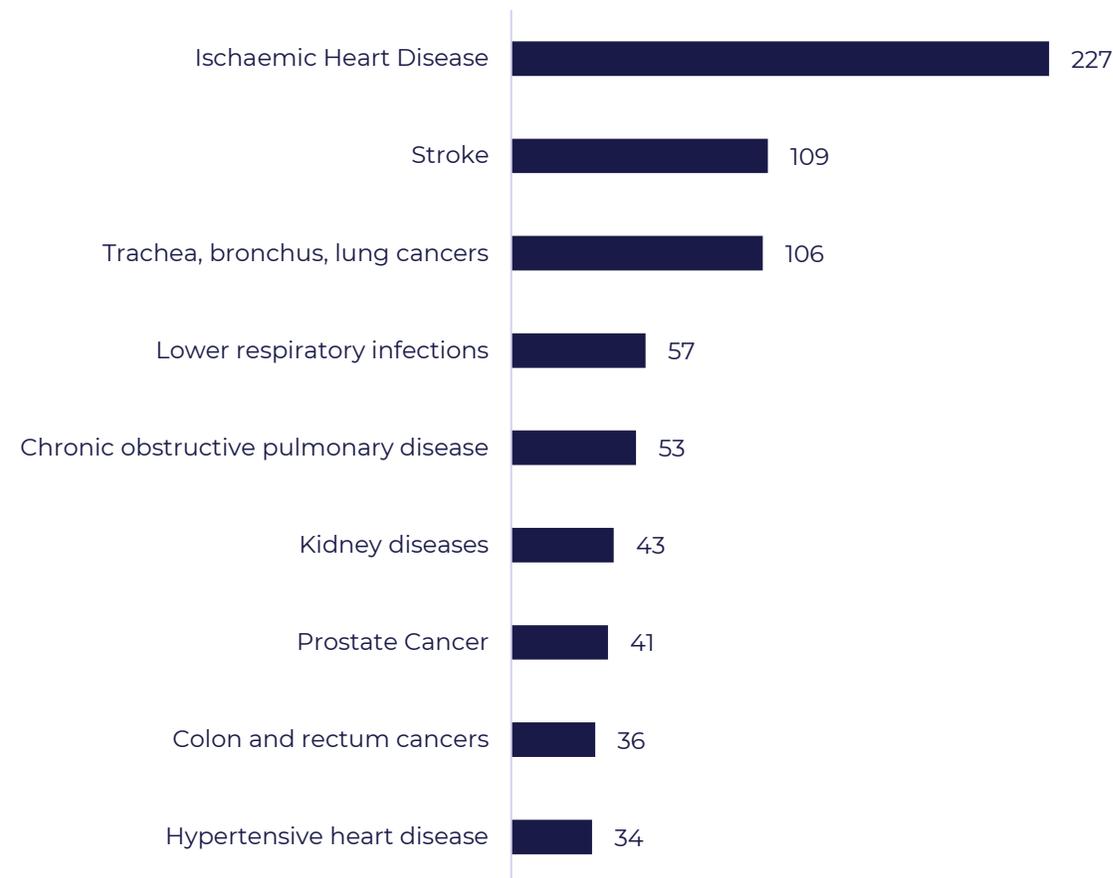


Epidemiological Profile of Greece

Top Cause of DALYs per 100k Population (2021)



Cause of Death per 100k Population (2021)

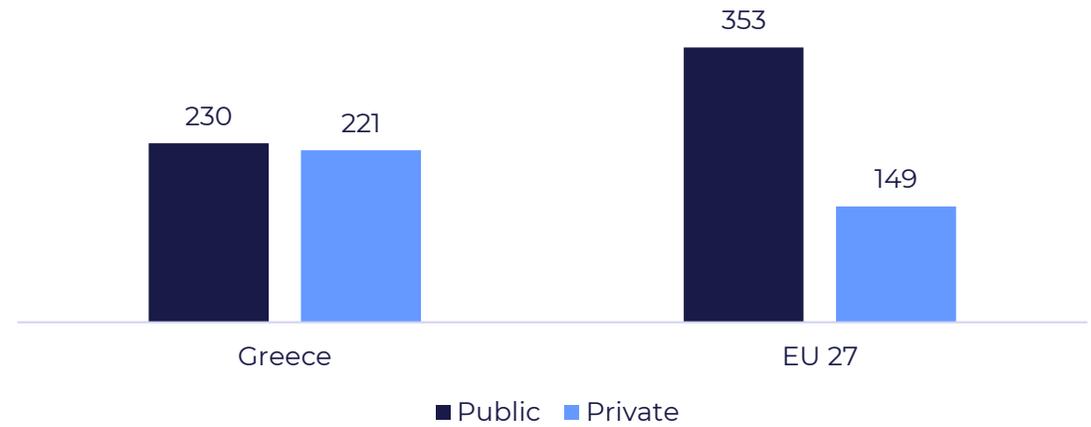


Pharmaceutical Expenditures in Greece

Expenditure for Pharmaceutical Disposables (in € bn.)



Per Capita Spending on Pharmaceutical Disposables - 2022 (in €)



Funding Sources of Total Pharmaceutical Spending



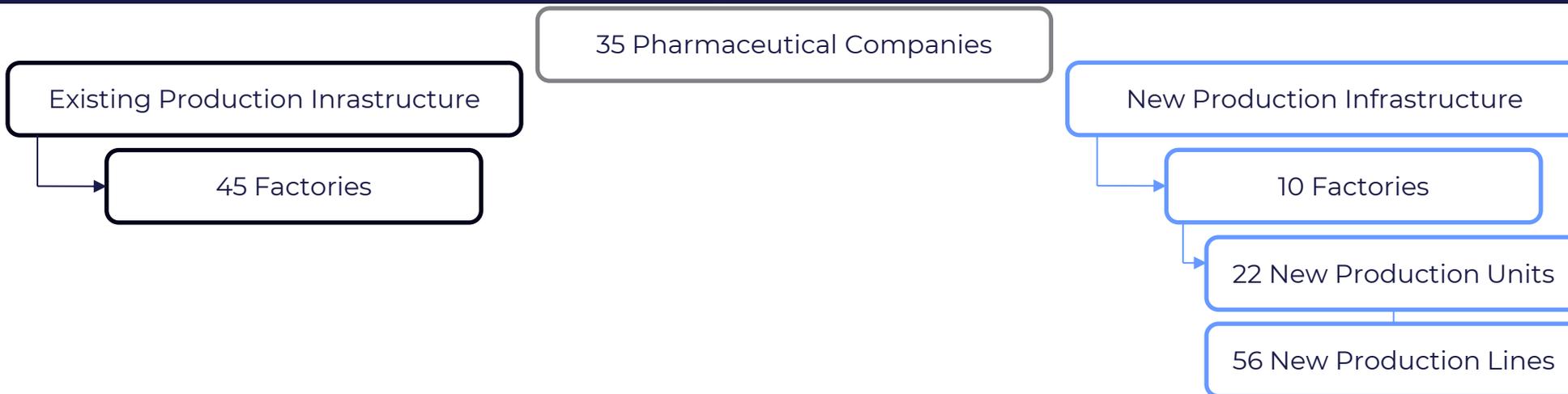
Overview of the Greek Pharmaceutical Sector

Pharmaceutical Sector's Profile

- 1 **45** Factories (**12%** of EU's production capacity)
- 2 **27** Research Departments/Centres
- 3 Ability to cover ~**60%** of Greece's pharmaceutical needs
- 4 Ranked among the top 5 pharmaceutical production hubs in Europe
- 5 Presence in **147 countries**
- 6 **Greek pharmaceutical exports: 2nd largest export product of Greece's economy**
- 7 Currently serves **40 million** European patients

Overview of the Greek Pharmaceutical Sector

Investment Planning in Infrastructure 2020-2026



Effects of the Investment Plan of the Greek Pharmaceutical Sector

- €1.5 Billion Investment
- 10 New Factories & 14 New Research Facilities
- Upgrade of Production & Research Capabilities
- Multiplier Effect on the Economy (Employment, GDP, Tax Revenues, Exports – Trade Balance)
- Social Impact: Expanded Access, Lower Costs, Therapeutic Options, Self-Sufficiency

Greek Pharmaceutical Sector – Key Figures

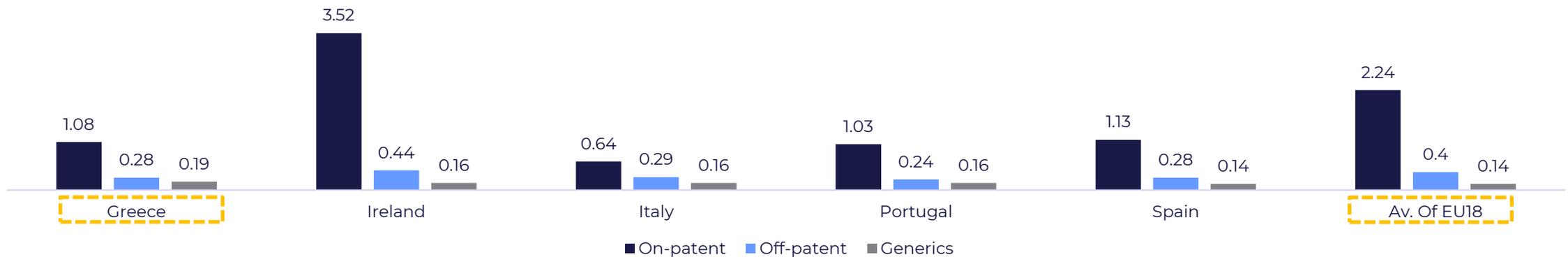
GVA Manufacturing as % of GDP



GVA of Pharma Production and Share in Manufacturing (GR) (in € m.)

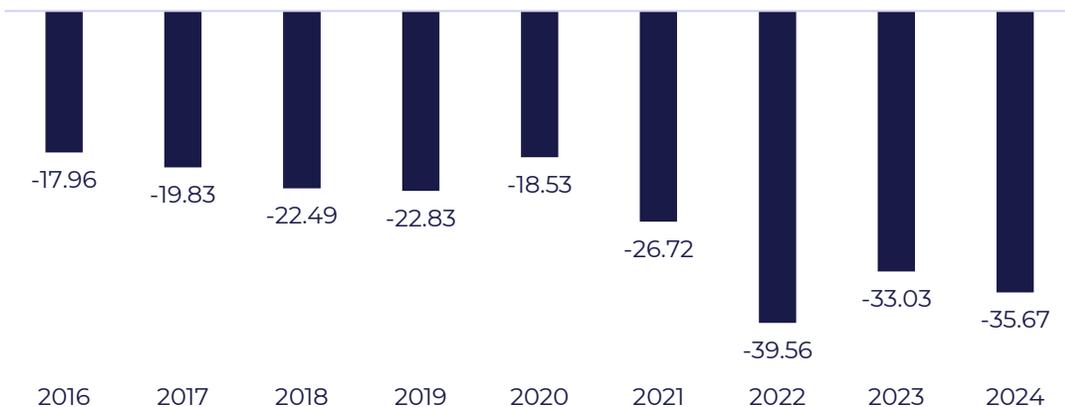


Pharma Pricing Based on Protection Status EU18, 2023 (€ per Unit)

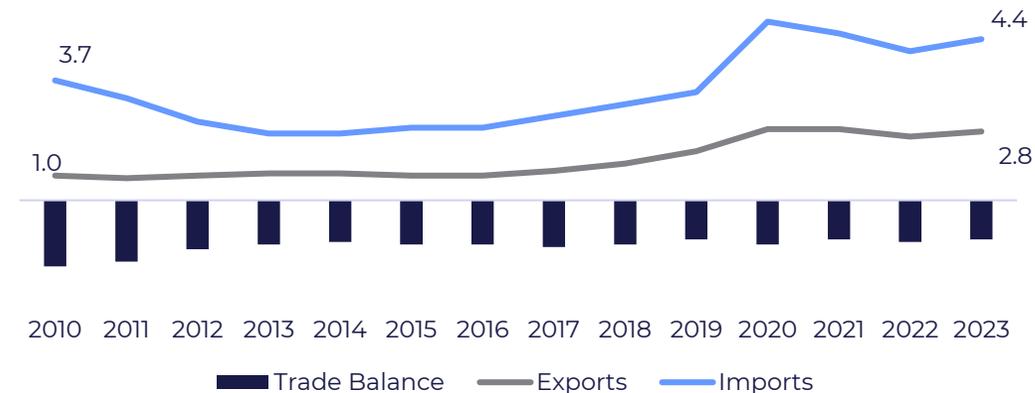


Greek Pharmaceutical Sector – Key Figures (CONTN'D)

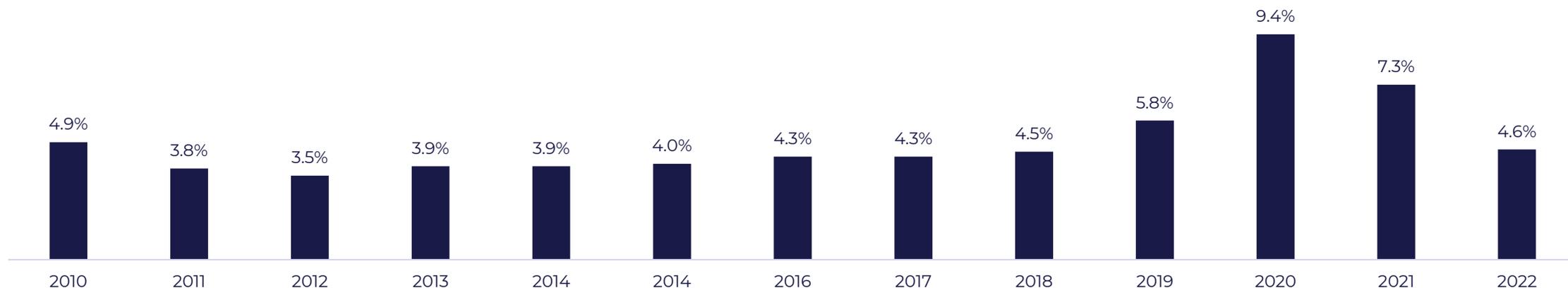
Greece's Trade Balance of Goods (in € bn.)



Greece's Pharma Products Trade Balance (in € bn.)



Exports of Greek Pharma Products as a % of Total Exports

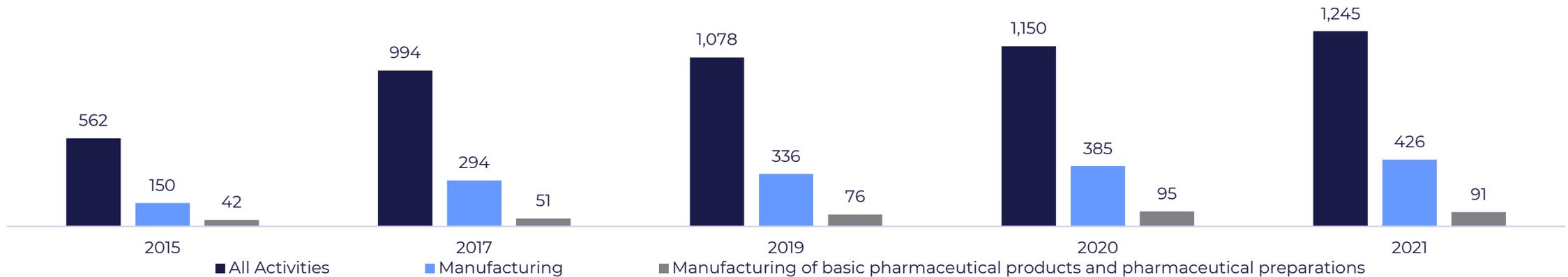


R&D Expenditures

Business Enterprise R&D Expenditure as % of GDP: Greece vs. EU



Business Enterprise R&D Expenditure by Industry in Greece (in € m.)

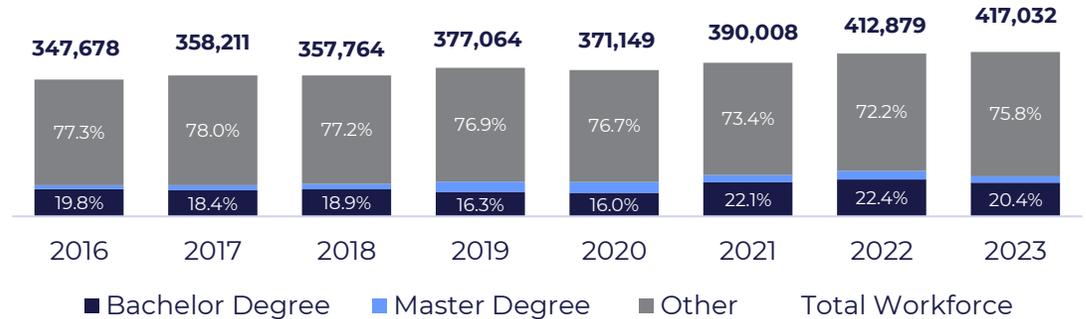


Academic Background of the Greek Workforce

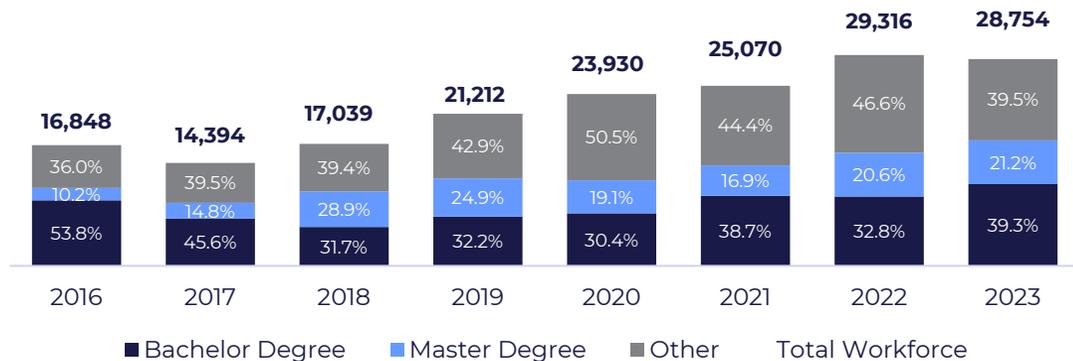
Academic Background of the Workforce - All Industries



Academic Background of the Workforce - Manufacturing



Academic Background of the Workforce - Pharmaceuticals



“Greek Pharma Industry by the Numbers”