

THE BELGIAN BIOPHARMACEUTICAL SECTOR IS LOSING GROUND IN EUROPEAN RANKINGS



FOREWORD

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EU Pharma Figures 2025: time to act!

The latest EU Pharma Figures 2025 exhibit a worrying trend: Belgium's position as a leader in the European biopharmaceutical sector is under threat.

We have slipped down the ranking on almost all indicators: employment opportunities, patent applications, R&D expenditures, and export. However, biopharmaceutical is still an innovative driving force for the manufacturing industry in our country, contributing 20 % of the added value. And that means Belgium cannot afford to lose a position that it has established through years of dedication and vision.

The sector is still making an essential contribution to the economy, with thousands of jobs, high quality expertise and a vital impact on the health of our citizenry. Maintaining and reinforcing this major economic

footprint is important, not only in the current international context – It is absolutely fundamental in light of the challenges healthcare is facing in our own country. In particular, it is crucial that we have a strategy that ensures our residents and patients have access to the innovative treatments on the horizon.

To achieve this goal, Europe and Belgium need to be working towards an authentic, coherent strategy for the life sciences, rather than offering a hotchpotch of isolated initiatives. We need a strategy that links goals to actions. A strategy that gives the sector fresh fuel for growth and innovation. A strategy that supports the industry so it can remain competitive on the world stage. And most importantly: we need a strategy that can transform the fruits of innovation and R&D into treatments accessible by the people who need them.

After all, investing in innovation is investing in the future. Investing in health. Investing in economic resilience. Investing in independence. Investing in the wellbeing of our future generations.

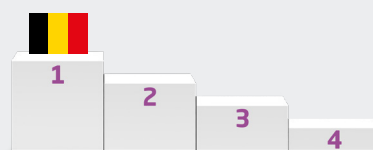
If Belgium and Europe want to maintain their leading role in international pharma, we need to act now. Policymakers, enterprises and key stakeholders in the healthcare ecosystem need to work together to create fresh momentum for innovation and value creation, underpinned by targeted support and appropriate legislation.

The time to act is not tomorrow. It is now.

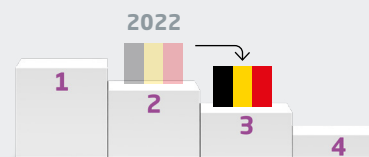
KEY FIGURES

The Belgian biopharmaceutical sector is losing ground, but is still one of Europe's key players

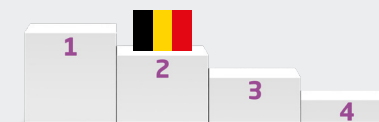
R&D (2023)



in R&D expenditures per capita



in R&D expenditures

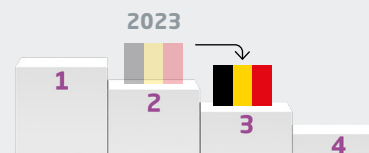


in clinical trials per capita

Patents (2024)

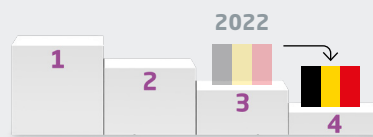


in patent applications per capita¹

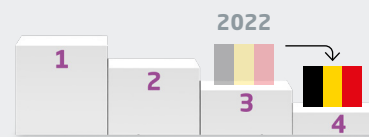


in patent applications relative to all patent applications in the country²

Jobs & productivity (2023)



in employment share (direct, indirect and induced)³ relative to national employment rate (2023)

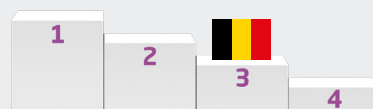


in biopharmaceutical R&D jobs per capita

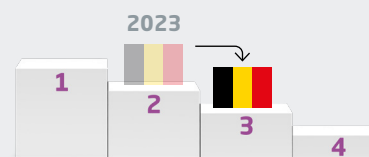


in gross added value per employee

Export (2024)

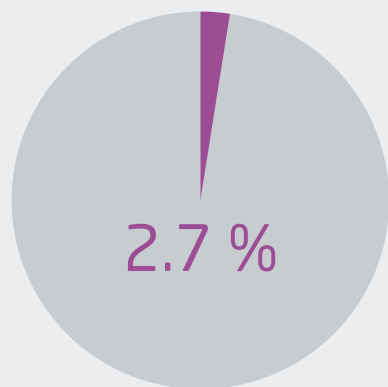


in export per capita

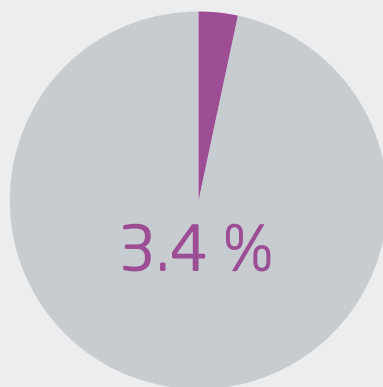


in export

Belgium's share within the European Union



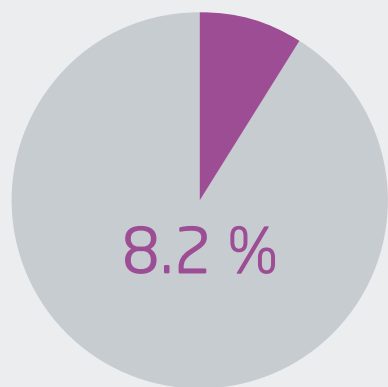
Population
2024



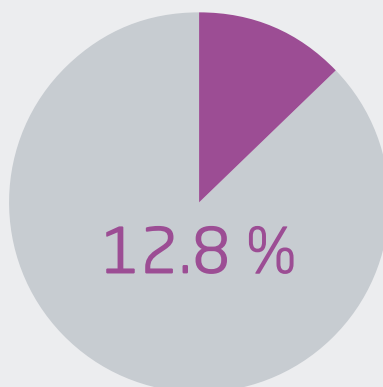
GDP
2024



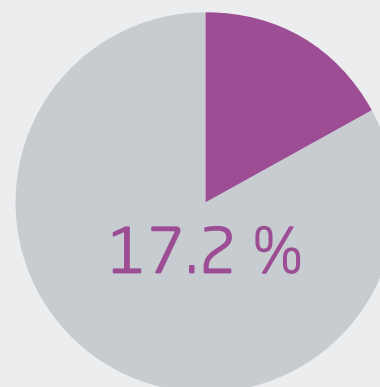
Biopharmaceutical patent applications
2024



R&D employment in the biopharmaceutical sector
2023



Export of biopharmaceuticals
2024

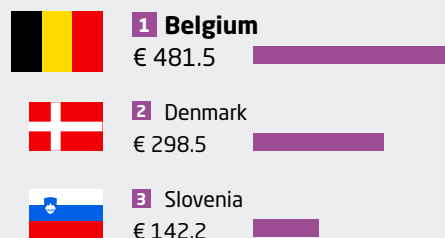


R&D expenditures in the biopharmaceutical sector
2023

01 RESEARCH AND DEVELOPMENT

Innovation as a driving force

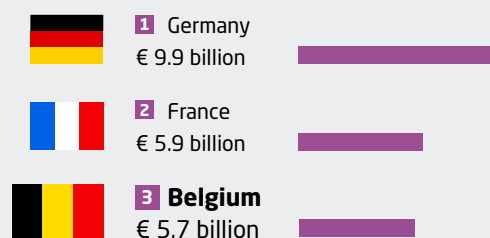
NO. 1 in R&D expenditures per capita in the biopharmaceutical sector



Biopharmaceutical R&D expenditures – per capita 2023

The Belgian biopharmaceutical sector is securely holding its leading position in Europe for R&D expenditures per capita. Our expenditures are around 60 % higher than Denmark's (in second place), and more than three times greater than third-place holder Slovenia. By comparison with the EU27 average, the difference is even starker: Belgium is investing around seven times the average. However, it is also noticeable that the figures for Belgium are dropping, while other countries, like Denmark, are increasing their R&D expenditures per capita.

NO. 3 in biopharmaceutical R&D expenditures



Biopharmaceutical R&D expenditures – total 2023

Belgium is also in a strong position within Europe in terms of absolute figures. Matching the 2022 figures, Belgium's biopharmaceutical sector invested 5.7 billion euros in R&D in 2023, equivalent to 15.5 million euros a day. This has enabled Belgium to hold its place within the top three, even though it is only eighth largest in terms of population. In fact, expenditures in Belgium are three times those of much larger Italy, and four times greater than Spain's. However, while Belgium's expenditure has remained steady, neighbouring country France has been increasing its investments, nudging Belgium out of its second position and into third place. Germany remains securely at the top of the list.

NO. 2 in clinical trials per capita



Number of approved clinical trials – per capita 2023

In 2023, Belgian authorities approved 424 clinical trials. This figure is again slightly down from 2022. The drop is probably linked to the introduction of the European Clinical Trials Regulation, which harmonises and regulates the framework for clinical trials. Despite the slight fall in absolute figures, Belgium remains the country with the highest number of clinical trials per capita, after Denmark.

02 PATENTS

Patents as an essential criterion for innovation

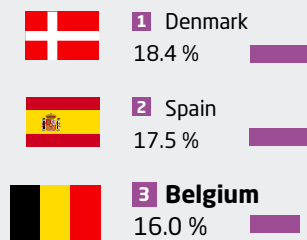
NO. 2 in biopharmaceutical patent applications per capita¹



Number of patent applications in the field of pharmaceuticals and biotechnology – per capita 2024

Another important indicator of innovation is the number of patent applications being submitted. In 2024, for the first time in years, we see a decline in the number of patent applications filed by Belgian biopharmaceutical companies per capita – from 446 down to 417. In fact, the number of applications has reduced across the whole of the EU. However, this is not due to any general tendency – some countries, such as Spain and the Netherlands, are actually slightly up on the previous years, with the Netherlands climbing into third place. Belgium has kept its second place, with just Denmark ahead of us.

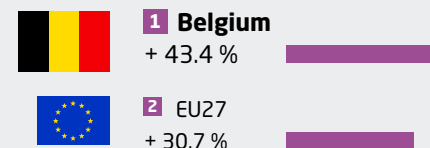
NO. 3 in share of biopharmaceutical patent applications in the country²



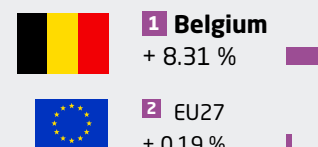
Biopharmaceutical patent applications as a percentage of all patent applications in the country² – total 2024

Looking at the number of biopharmaceutical patent applications in relation to the total national patent applications, we again see a drop in Belgium's figures. Although we have had to cede our second place to Spain, we remain in the European top three. In fact, Belgium's share of 16.0 % biopharma is still almost double the figure for France, the next country in the European rankings. Although Belgium has moved down a place, it is clear from the figures that the biopharmaceutical sector is still crucial to our national research and innovation.

Steady focus on innovation



Evolution of biopharmaceutical R&D expenditures – per capita 2019-2023



Evolution of the number of patent applications in the field of pharmaceuticals and biotechnology – total 2020-2024

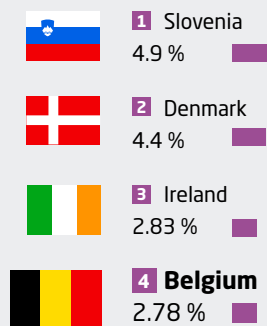
The fact that despite the drop in numbers, Belgium's biopharmaceutical sector remains ahead of many other European countries can be attributed to years of hard work. Over the period 2019-2023, the per-capita Belgian R&D expenditures in the biopharmaceutical sector increased by more than 43 %. This is almost 13 % higher than the growth in R&D expenditures per capita across the EU27 as a whole.

While the number of biopharmaceutical patent applications from Belgium dropped between 2023 and 2024, the overall period 2020-2024 saw an increase by 8 %. We largely see the EU27 stabilising during this period.

03 JOBS & PRODUCTIVITY

The importance of human capital

NO. 4 in employment share in the biopharmaceutical sector in relation to national employment



Employment share in the biopharmaceutical sector (direct, indirect and induced)³ in relation to national employment – total 2023

The biopharmaceutical sector in Belgium was a source of almost 45,000 direct jobs in 2023. If we add indirect and induced jobs to this figure, we are talking about close to 141,000 jobs. In other words, more than 1 in 40 jobs in Belgium is linked to the biopharmaceutical value chain. This figure is almost unchanged since 2022. However, Belgium has been pushed one place down the European rankings, with Ireland overtaking us to take third position.

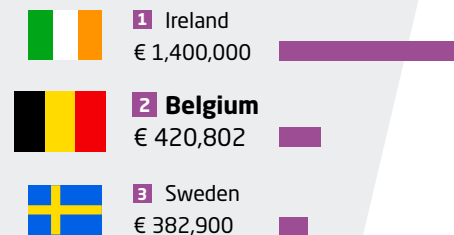
NO. 4 in biopharmaceutical R&D jobs per capita



Biopharmaceutical R&D jobs – per capita 2023

For R&D jobs per capita, we see Belgium dropping from third into fourth place in the 2023 rankings. There has been significant growth in research employment in Hungary, pushing it ahead of Belgium. However, the Belgian biopharmaceutical sector is still employing some 6,500 researchers.

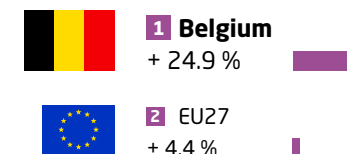
NO. 2 in gross added value per employee



Direct gross added value - per employee 2022

Employees in the biopharmaceutical sector continue to be more productive than the average, and Belgium holds its second place in the European rankings for added value generated per employee. The added value in Belgium is more than double the average value across the EU27.

Sustainable investment in talent as a driver of innovation



Evolution of biopharmaceutical R&D employment – total 2019-2023

The fact that Belgium continues to be among Europe's top innovators, year after year, is due not least to the biopharmaceutical sector's systematic investments in human capital, and in particular in researchers. Indeed, between 2019 and 2023, in Belgium the number of researchers increased by a quarter, while in the EU27 overall, the number of researchers only grew by 4 %. However, while Belgium is certainly doing well in this area, other countries such as Austria, Portugal and Sweden are doing even better. It is therefore still crucial for Belgium to retain its focus on developing the sector.



04 EXPORT

Innovation with global impact

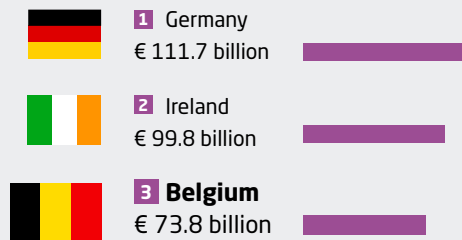
NO. 3 in biopharmaceutical exports per capita



Export of biopharmaceuticals – per capita 2024

In 2024, Belgium retained its place in the European top 3 for international trade in biopharmaceuticals and vaccines (per capita). This means that it was not just Belgian patients benefiting from the innovative products coming out the Belgian biopharmaceutical sector, but in fact patients worldwide.

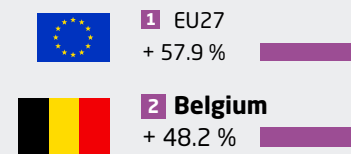
NO. 3 in biopharmaceutical exports



Biopharmaceutical exports – total 2024

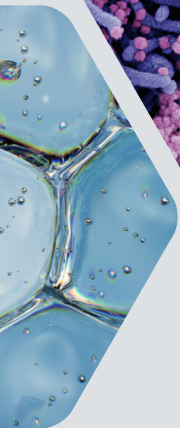
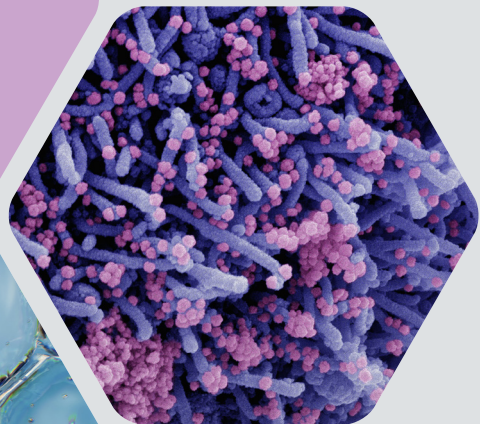
Belgium's export figures are not just impressive when considered per capita, but also as absolute numbers, despite the country's small size. In fact, thanks to its two airports and a shipping port with bespoke services for biopharmaceutical exports, Belgium places third on the European ranking, only behind Germany and Ireland. Admittedly it has moved down a place since 2023. This is due to both the reduction in exports of COVID-19 vaccines, and Ireland making significant advances in terms of exports.

Focus on export



Evolution of biopharmaceutical exports – total 2019-2024

In the exports arena, Belgium achieved significant growth of 48.2 % in the period 2019-2024. However, growth across the EU27 was even greater, at 57.9 %. The increase is being driven by countries like Ireland and Italy that are working hard on developing their biopharmaceutical sectors. Belgium is thus under pressure to maintain its position as an export hub.



Footnotes

1. Biopharmaceutical patents refer to patents in the technological fields of pharmaceutical products and biotechnology.
2. Benchmarking limited to countries with at least 2,000 patent applications to avoid problems of comparability.
3. In addition to direct employment in the sector itself, we also take into account indirect jobs (for example jobs in Belgium at subcontractors who supply raw materials or services to the biopharmaceutical sector) and induced jobs (jobs created in Belgium by the expenditures of employees active in the biopharmaceutical sector).

Sources

The indicators developed in this brochure are based on the following sources:

- Statbel
- Eurostat
- National Bank of Belgium (NBB)
- Belgian National Social Security Office (NSSO)
- EFPIA, The Pharmaceutical Industry in Figures, Key Data 2025
- European Patent Office (EPO)
- PwC, EFPIA Economic Impact Assessment of the Pharmaceutical Industry in Europe (2024)
- Deloitte, Belgium as clinical trial location in Europe

Methodological notes

The comparisons made in this brochure cover the EU27 countries (UK not included). Data for 2024 is not yet available for certain indicators.

In these cases, the comparison was based on data for 2023.

