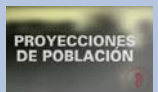
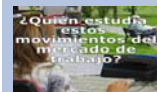




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## Health Industries



### In this number...

COVID-19-Related Products  
Pharmaceutical Manufacturing  
Manufacturing of Medical and Dental Use Products

The covid-19 pandemic has increased global demand for products for disease protection, prevention and early detection. These international purchasing flows were reflected in international trade statistics for the first months of the year. In the case of Spain, data showed an almost 23% increase in imports from non-EU countries during the first four months of the year, compared to the same period the previous year, and a 5.2% increase in exports to the same group from non-EU countries.

Along with the latest data on covid products traded between countries, here we provide the main results from the latest Structural Business

Statistics regarding the manufacturing of pharmaceuticals and medical and dental use products. The pharmaceutical industries are among the sector's most productive and have some of the highest export sales. In the case of medical and dental products, microenterprise predominates (less than 10 employees per company) and most sales are within Spain.

**Sources:** Eurostat (Annual detailed enterprise statistics for industry, EU trade since 2015 of COVID-19 medical supplies), INE (Structural Business Statistics: Industrial Sector).



**What are they?**

This publication refers to products sold and used in direct response to the pandemic as covid-19-related products, or covid products: sterilization products (including disinfectants), medical vehicles and supplies, protective clothing, diagnostic test equipment, medical devices, oxygen equipment and medical consumables.

**Trade flows on the rise, especially for protective equipment**

According to data published by Eurostat, between January and April of 2020 the value of Spanish imports of these products from non-EU countries increased by 22.9% compared to the same period in the previous year. Intra-EU imports also increased, although to a lesser extent (8.7%).

On the other hand, in the same period the value of exports to non-EU countries increased by 5.2% and to Member States by 11.7%.

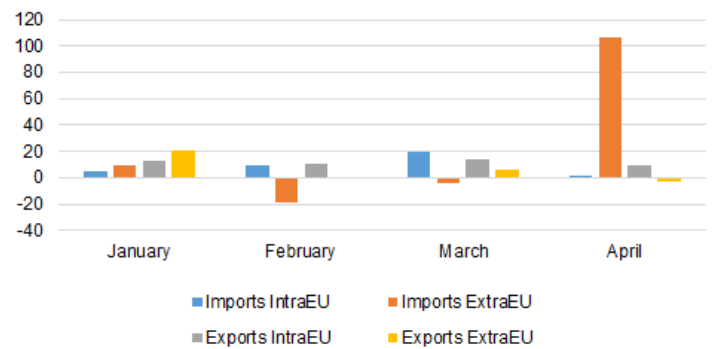
**Germany and China were the main trading partners**

For all products, the primary countries of origin for extra-EU imports were China, the United States and Switzerland. Among the Member States, the main countries of origin were Germany, the Netherlands and Belgium.

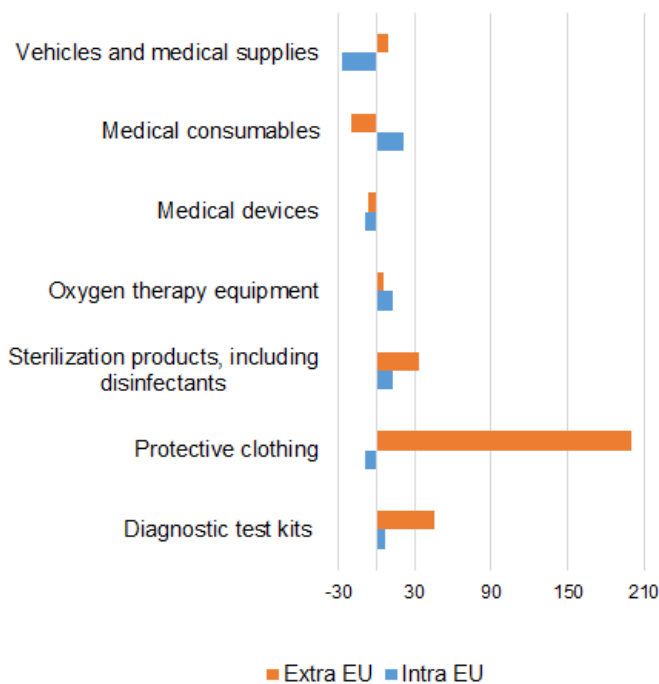
In the first four-month period of 2020, among the Member States, the value of exports to Germany, France, Portugal and Italy stand out; and among countries outside the EU, to the United Kingdom, the United States, China and Japan.



**International trade in covid products 1st four months of 2020**  
(% variation compared to the same month the previous year)



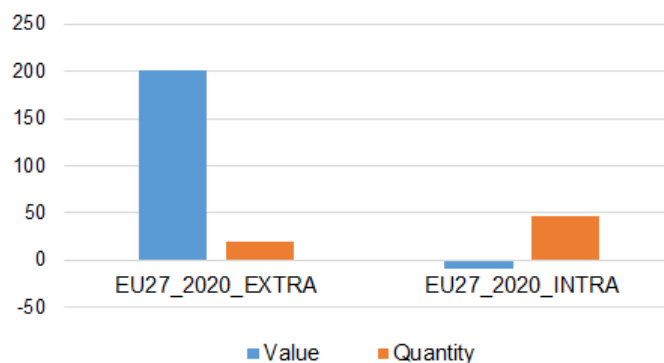
**Imports of covid products by product type and region**  
(% variation between the first four months of 2020 compared to 2019)



## Protective Clothing

By product type, the increase in extra-EU imports of protective equipment is of note, not so much in quantity as in value (200.6% in value compared to 18.8% in quantity). The opposite occurs in EU imports, with a greater increase in quantity than in value, and a less pronounced difference.

## Protective clothing imports in value and quantity (Jan-April 2020/2019%)



## Pharmaceutical Manufacturing



### Medium-sized and high-productivity companies

According to the latest data from the Structural Business Statistics: Industrial sector, in 2018 there were 330 companies in Spain whose main activity was pharmaceutical product manufacturing. Turnover for these companies reached 14,641 million euros, which represents 2.7% of turnover for the entire manufacturing industry.

Within the current EU (27), these companies' turnover represents 3.9%. By country, Denmark has the highest weight (12.1%), followed by Belgium (9.2%) and Cyprus (6.9%). Outside the EU, Switzerland stands out: pharmaceutical product manufacturing accounts for slightly over a quarter of its entire manufacturing industry (26.4%).

On average, 47,449 people worked in these companies in Spain, with a high rate of paid personnel (99.8%) almost half of whom are women (49.1%). There are 143.8 employees per company, well above the 11.7 of the average manufacturing industry in Spain.

### More than half of sales are outside Spain

These industries are among the most productive, with 110,546 euros per person and the highest percentage of sales abroad. In 2018, almost 53% of turnover corresponded to sales outside Spain, compared to an average of 38.2% in the manufacturing industry as a whole.

## Main magnitudes and indicators. 2018

Main magnitudes	Manufacturing (total)	Manufacture of basic pharmaceutical products and pharmaceutical preparations
Number of companies	171 994	330
Net turnover	551 091 333	14 641 245
Value of production	518 813 164	14 233 665
Added value at factor cost	120 875 592	5 245 301
Gross operating surplus	47 616 274	2 544 266
Total purchases of goods and services	445 719 745	9 976 179
Gross investment in tangible assets	20 724 544	777 186
Expenditure on personnel	73 259 318	2 701 035
Employed persons	2 019 905	47 449
Paid personnel	1 911 633	47 341
Employees in full time equivalent units	1 839 977	46 614
Worked hours by paid personnel	3 221 144	81 016
<b>Main indicators</b>		
Productivity	59 842	110 546
Average personnel costs	38 323	57 055
Value added rate	23.3	36.9
Personnel cost rate	60.6	51.5
Gross operating rate	8.6	17.4
Share of employees in persons employed	94.6	99.8
Investment rate	18.8	17.3
Female participation rate in paid staff	26.9	49.1
<b>Other indicators</b>		
Percentage of sales within Spain	61.8	47.1
Persons employed per enterprise	11.7	143.8





### Small Businesses

Within the group Other manufacturing industries -and, with less weight, in the industrial sector as a whole- are the companies whose main activity is the manufacturing of medical and dental instruments and supplies.

There were 5,117 of these companies in Spain in 2018, with a turnover of almost 2,000 million euros. This represents just 0.4% of turnover for the entire manufacturing industry.

Within the EU, these companies' turnover represents an average of 1.1% of industry as a whole. By country, Denmark has the highest weight (2.2%), followed by Germany (1.3%) and Italy (1.1%). Country outside the EU with a significant weight are Iceland (3.6%) and Switzerland (1.9%).

On average, 21,975 people worked in these companies in Spain, of which 81.9% were paid personnel. Of this personnel, half were women (50.1%). There are an average 4.3 employees per company, well below the 11.7 of the average manufacturing industry in Spain.

### Almost 70.3% of sales are made within Spain

Productivity is 38,991 euros per employee, lower than the manufacturing industry average of 59,842 euros. Likewise, these companies are below average in percentage of sales abroad. 29.7% of sales are outside of Spain, compared to an average of 38.2% in the manufacturing industry as a whole.

## Main magnitudes and indicators. 2018

Main magnitudes	Manufacturing (total)	Manufacture of medical and dental instruments and supplies
Number of companies	171 994	5 117
Net turnover	551 091 333	1 999 935
Value of production	518 813 164	1 880 964
Added value at factor cost	120 875 592	856 842
Gross operating surplus	47 616 274	292 746
Total purchases of goods and services	445 719 745	1 222 572
Gross investment in tangible assets	20 724 544	224 525
Expenditure on personnel	73 259 318	564 096
Employed persons	2 019 905	21 975
Paid personnel	1 911 633	17 989
Employees in full time equivalent units	1 839 977	16 907
Worked hours by paid personnel	3 221 144	29 951
<b>Main indicators</b>		
Productivity	59 842	38 991
Average personnel costs	38 323	31 357
Value added rate	23.3	45.6
Personnel cost rate	60.6	65.8
Gross operating rate	8.6	14.6
Share of employees in persons employed	94.6	81.9
Investment rate	18.8	29.5
Female participation rate in paid staff	26.9	50.1
<b>Other indicators</b>		
Percentage of sales within Spain	61,8	70,3
Persons employed per enterprise	11,7	4,3