

Pharmaceutical & Life Sciences Sector in **SLOVAKIA**



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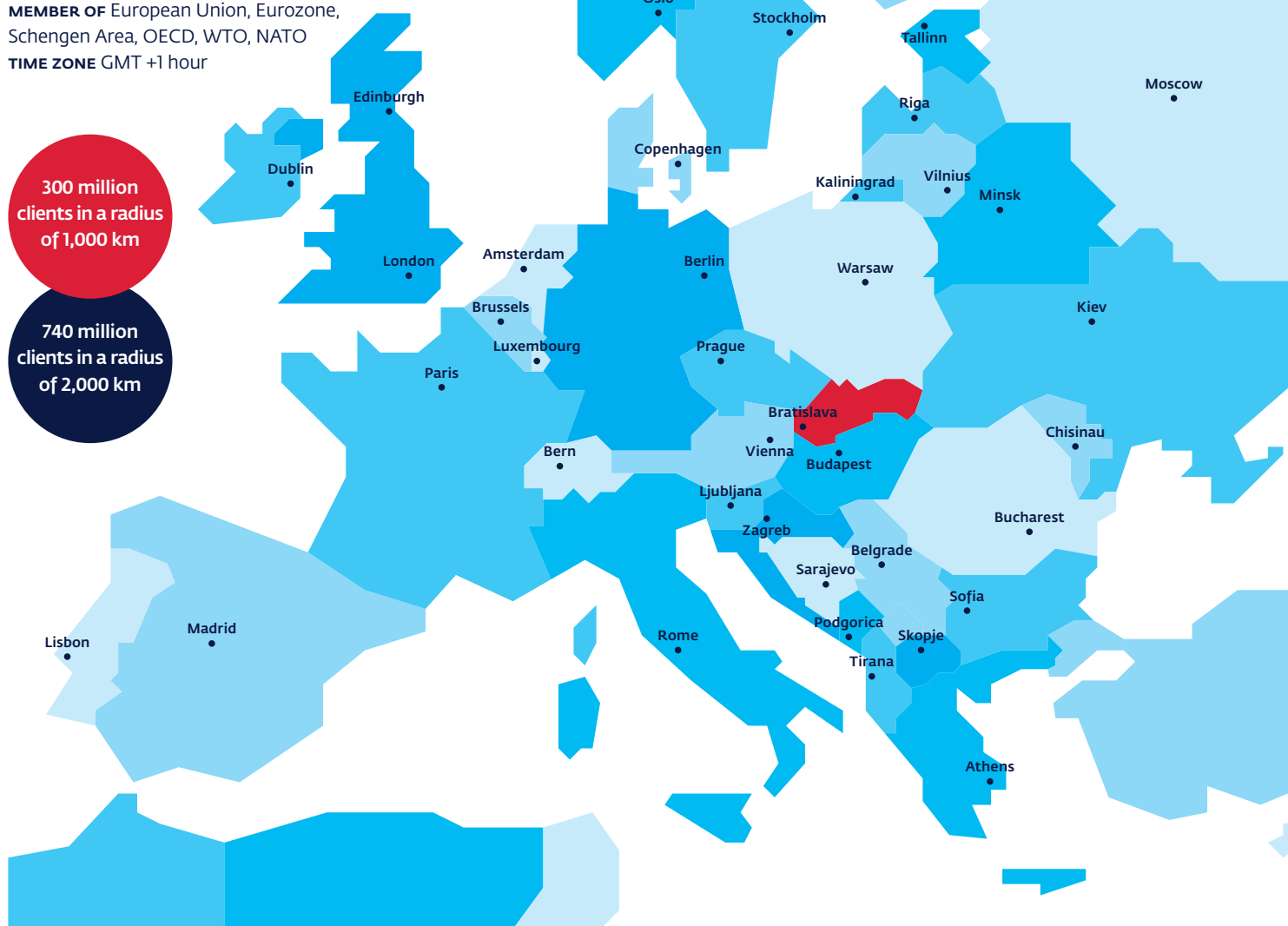
The purpose of this publication is to present the opportunities that Slovakia has to offer to potential investors from the pharmaceutical & life sciences sector. It includes facts and figures for all major subcategories of this segment and serves as an introduction to why Slovakia should be a preferred location for your pharmaceutical and healthcare business.



TOTAL AREA 49,035 km²
POPULATION 5.4 million
CAPITAL CITY Bratislava
MEMBER OF European Union, Eurozone, Schengen Area, OECD, WTO, NATO
TIME ZONE GMT +1 hour

300 million clients in a radius of 1,000 km

740 million clients in a radius of 2,000 km



Pharmaceutical & Life Sciences in Slovakia — Key Facts

The Life Sciences sector in Slovakia is represented mainly by the production of pharmaceuticals, medical devices and cosmetics. Although this sector accounts for a relatively small share on the entire industrial production, it offers great potential for new investors.

544
MIL. EUR

Total revenues generated by pharmaceutical manufacturers and medical devices producers

316

Pharmaceutical manufacturers and medical devices producers

7.8%

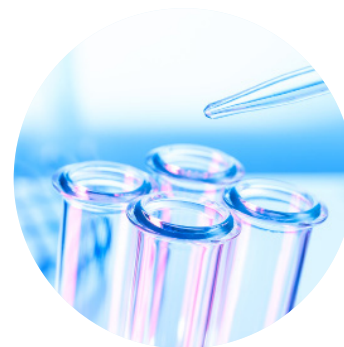
Public expenditure on healthcare

4,046

R&D personnel in medical and pharmaceutical sciences

1.40 BIL.
EUR

Investment in healthcare system based on Recovery and Resilience Plan of Slovakia



Top 10 Reasons to Invest in P&L Sector in Slovakia

1

Strong R&D focus on life sciences sector — presence of large international companies performing R&D

2

Constantly evolving research and academic infrastructure

3

Significant achievements in applied research

4

Strong local pharmaceutical sector and supplier network

5

Qualified and cost-effective workforce with high education level

6

CEE leader in labour productivity

7

EURO currency as one of the few in CEE

8

Political and economic stability

9

One of the fastest-growing Eurozone members

10

Attractive investment incentives

Source: Finstat 2024 (data for 2023), Yearbook of Science and Technology 2023 (data for 2022), Recovery and Resilience Plan of Slovakia (2022), OECD: Health spendings (data for 2023)

Pharmaceutical Production in Slovakia

The large scale production of drugs is one of the youngest sectors in Slovak manufacturing. The history of the pharmaceutical industry in Slovakia dates back to the 1950s, when 3 large state-owned companies were established in Slovenská Ľupča, Šarišské Michaľany and Hlohovec.



Today, all of the Slovak pharmaceutical companies are owned by private investors, typically providing contract manufacturing for major global companies.

LIST OF MAJOR PHARMACEUTICAL PRODUCERS IN SLOVAKIA

COMPANY NAME	LOCATION	CORE PRODUCTION	SALES REVENUE (MIL. EUR)	EMPLOYEES
Saneca Pharmaceuticals	Hlohovec	active pharmaceutical ingredients	85.94	874
HBM Pharma	Martin	sterile liquids and tablets	42.90	358
Hameln rds	Modra	human and veterinary medicaments	34.62	127
Unimed Pharma	Bratislava	eye drops and tablets	18.68	145
Biotika	Slovenská Ľupča	active pharmaceutical ingredients	16.18	207
Pharmagal Bio	Nitra	veterinary imunological medicaments	14.53	43
Generica	Piešťany	vitamins, minerals, supplements	7.12	46
AtB Pharma	Martin	active pharmaceutical ingredients	6.68	73
Imuna Pharm	Šarišské Michaľany	immuno preparations, blood substitutes, allergen preparations	6.7	228
Farmácia Martin	Martin	pharmaceutical preparations	5.45	52
Panacea	Žilina	pharmaceutical and medical equipment	5.38	43
Galvex	Banská Bystrica	tablets, suppositories, solutions, medical devices, topical preparations	4.59	50
Biomín	Cífer	vitamins, minerals, supplements	4.33	41
Herb-Pharma Corporation	Veľké Ludince	supplements, cosmetic products	4.18	38
Pharmagal	Nitra	veterinary imunological medicaments	3.67	41

Source: FinStat 2024 (data for 2023)

Top Players of the Slovak Pharmaceutical Industry



SANECA PHARMACEUTICALS

Slovakia's largest pharmaceutical company specializing in opiate development and the manufacture of APIs as well as liquid, semi-solid and solid finished dosage forms.



HBM PHARMA

A partner for contract manufacturing of pharmaceutical products in the field of production of injectables in ampoules, production of bulk tablets, packaging of tablets and quality control.



BIOTIKA

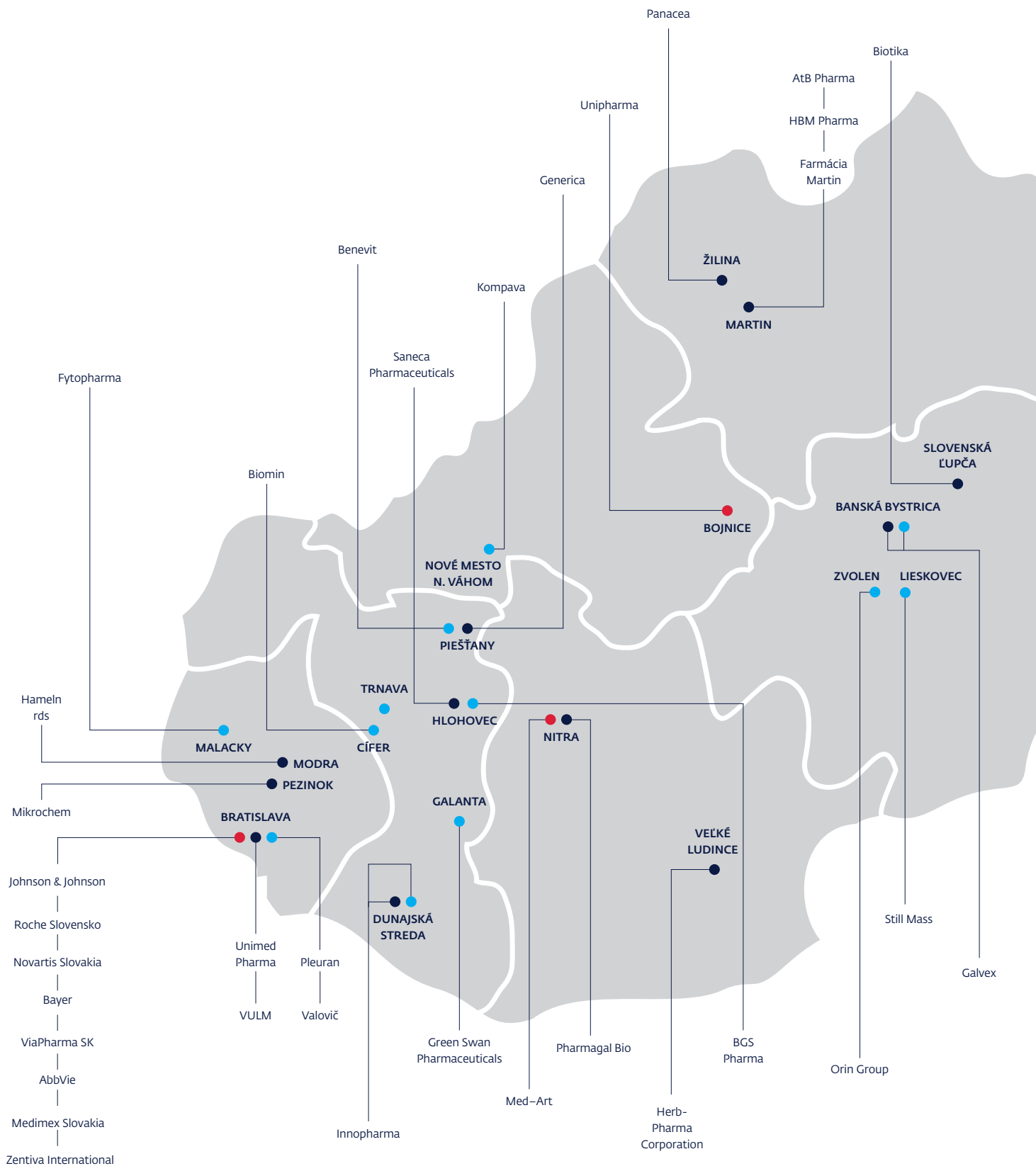
Biotika is well known as a reliable manufacturer of high-quality pharmaceutical preparations for human as well as veterinary application.



UNIMED PHARMA

Slovak pharmaceutical company focused on development and production of generic ophthalmologic products.

Map of Major Pharmaceutical Producers, Distributors & Producers of Vitamins, Minerals & Supplements in Slovakia





-
- pharmaceutical producers
 - distributors of drugs & healthcare products
 - producers of vitamins, minerals & supplements

MAJOR DISTRIBUTORS OF DRUGS & HEALTHCARE PRODUCTS IN SLOVAKIA

COMPANY NAME	LOCATION	SALES REVENUE (MIL. EUR)	EMPLOYEES
Phoenix Zdravotnícke Zásobovanie	Bratislava	830.03	506
Unipharma	Bojnice	629.15	681
Med-Art	Nitra	521.89	461
Johnson & Johnson	Bratislava	143.66	69
ViaPharma SK	Bratislava	139.44	83
Novartis Slovakia	Bratislava	133.01	119
Bayer	Bratislava	95.16	78
AbbVie	Bratislava	79.22	68
Roche Slovensko	Bratislava	72.44	116
Zentiva International	Bratislava	68.14	5
Timed	Bratislava	61.40	58
Medtronic Slovakia	Bratislava	57.51	100

SLOVAK PRODUCERS OF VITAMINS, MINERALS & SUPPLEMENTS

COMPANY NAME	LOCATION	CORE PRODUCTION	SALES REVENUE (MIL. EUR)	EMPLOYEES
Innopharma	Dunajská Streda	vitamins, minerals supplements	18.85	120
Pleuran	Bratislava	immunity care (Imunoglukan), vitamins	12.27	94
Orin Group	Zvolen	supplements (and medical devices)	8.37	43
Generica	Piešťany	vitamins, minerals supplements	7.12	46
VULM	Bratislava	food supplements, ointments, creams, drops, solutions	4.79	49
Galvex	Banská Bystrica	minerals, food supplements, creams	4.59	50
Biomin	Cífer	minerals & calcium produced from egg shells	4.33	41
Kompava	Nové Mesto nad Váhom	supplements	3.37	32
Natural	Spišská Nová Ves	vitamins, minerals, supplements	3.10	11
Fytopharma	Malacky	natural herb drops, teas, cosmetics	3.09	34
Dimenzia	Kežmarok	production and development of food supplements	1.99	15
Still Mass	Lieskovec	supplements	1.31	11

Source: FinStat 2024 (data for 2023)

Production of Medical Devices

The production of medical devices has a long history in Slovakia, particularly in the area of orthopedic and stomatological equipment. Before 1989, companies such as Chirana or Protetika had a strong position in the Czechoslovak market.

In the recent years, Slovakia has become an increasingly attractive investment destination for companies producing single use medical equipment. Most of the medical equipment produced in Slovakia is designated for foreign markets, with the exception of Protetika products. Medical devices and instruments are sold either directly by a production company, or by local distributors.

PRODUCERS OF MEDICAL DEVICES & DENTAL INSTRUMENTS

COMPANY NAME	LOCATION	CORE PRODUCTION	SALES REVENUE (MIL. EUR)	EMPLOYEES
Unomedical	Michalovce	single use medical equipment	74.70	648
Chirana T.Injecta	Stará Turá	single use injection devices	28.00	42
Protetika	Bratislava	orthopedic and prosthetic equipment	19.30	216
Biometrix	Šamorín	medical devices for intensive medicine, cardiology and surgery rooms	18.70	152
Chirana Medical	Stará Turá	stomatological systems	17.30	206
Europin	Trenčianske Stankovce	needles and cannulas	12.20	185
Diplomat Dental	Piešťany	dental units, stools and lights	11.50	136
Ferno Slovakia	Bošáca	transport medical equipment	10.20	62
Seisa Europe	Bratislava	medical components and sub implants for cardiology, urology	9.90	328
Neoprot	Bratislava	orthopedic, prosthetic equipment	7.60	71
OrtoproPlus	Košice	orthopedic, prosthetic equipment	7.30	95
Podotech	Senec	orthopedic and prosthetic equipment	6.70	60
SKY MEDICAL	Šamorín	single use medical equipment	4.10	86
BLUEMED	Bratislava	ultrasound diagnostic technology	2.60	4
STOMADENT SK	Lackovce	equipment for dental surgery	2.40	22

Source: FinStat 2024 (data for 2023)

Notable Slovak Medical Devices & Dental Instruments Producers



PROTETIKA

Producer of a wide range of medical aids and orthopedic footwear owning 26 retail shops throughout Slovakia, Protetika represents more than 90 years of orthopedic tradition.

CHIRANA

Development & production of anaesthesia units, breathing units, patient monitoring systems for intensive care, built on tradition of fine mechanics in Stará Turá. Together with Chirana Medical, a.s. it belongs to Chirana Holding, which dates back to 1935 and is an important player in the development and manufacture of respirators and anesthetic devices.



NEOPROT

Product portfolio ranges from bandages to prosthesis and orthoses for limbs, body and head. All the products are manufactured using the latest unique digital technologies.

DIPLOMAT DENTAL

Over 60 years of experience in designing and manufacturing of dental solutions. The product portfolio includes high quality dental units, stools, and lights.



ORTOPROPLUS

Manufacture of orthopedic and prosthetic products. In addition to prosthesis and orthoses, the product portfolio includes also wheelchairs and orthopedic footwear.

Production of Cosmetics in Slovakia



With an increased penetration of both local and global brands of cosmetic products, Slovak consumers have gained access to a greater assortment of goods.

The influence of ascension into the European Union has fueled consumer desire for variety in terms of price, function, composition and appeal. New brands and products that put an emphasis on innovation and quality are well accepted in the Slovak cosmetics market.

MAJOR COSMETICS PRODUCERS IN SLOVAKIA

COMPANY NAME	LOCATION	CORE PRODUCTION	SALES REVENUE (MIL. EUR)	EMPLOYEES
Haleon Levice	Levice	cosmetics and personal care products	226	565
Farmol	Levice	cosmetics and personal care products	20.1	201
Herba Drug	Smižany	cosmetics, detergents	5.1	63
Dulcia Natural	Bratislava	natural cosmetics	1.1	N/A
Dr. Sandra	Bratislava	cosmetics and personal care products	0.75	N/A
Solcom Media	Bratislava	perfumes	0.40	5
Benigma	Bratislava	perfumes, cosmetics and personal care products	0.32	3

Source: FinStat 2024 (data for 2023)

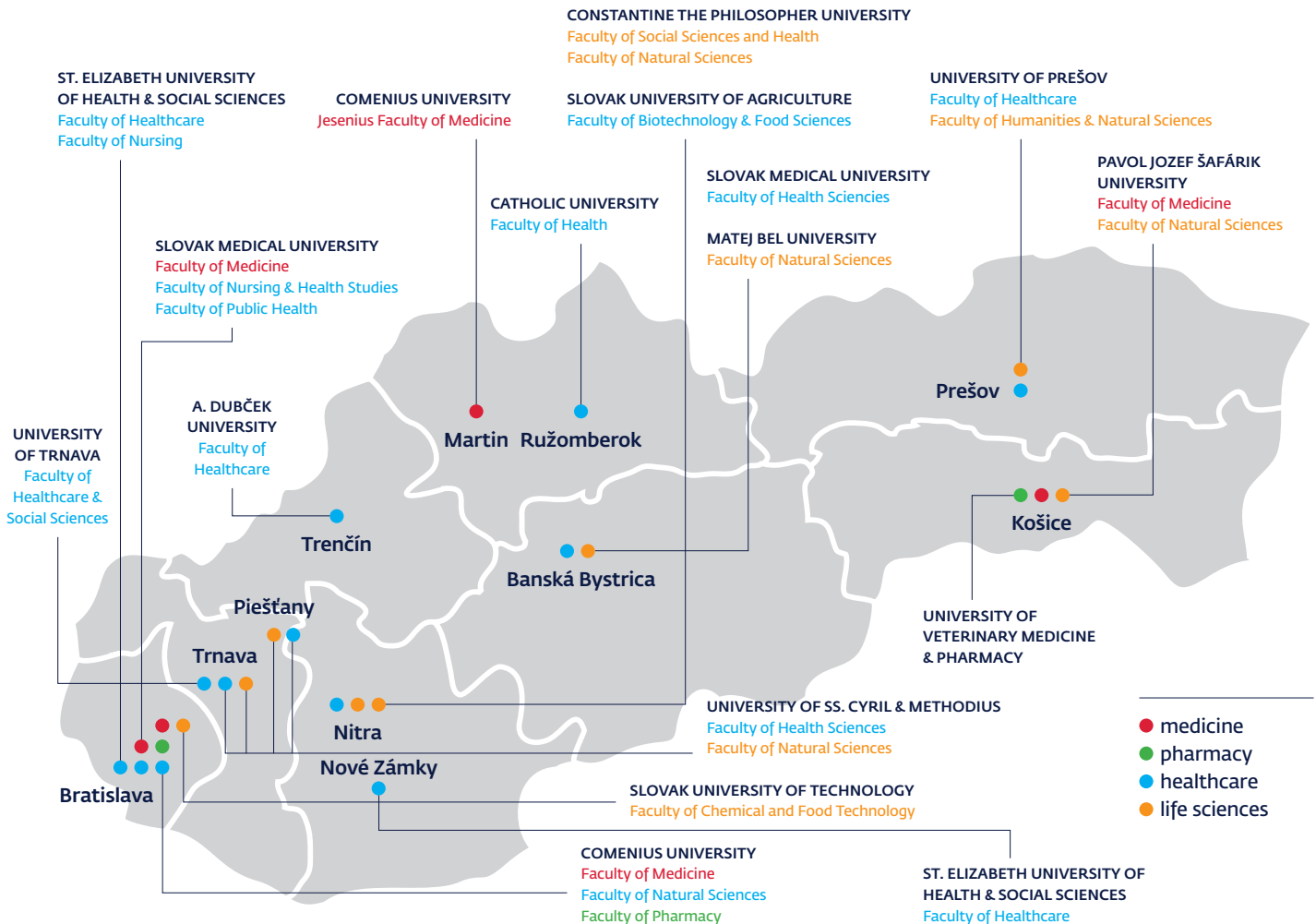
6,865
yearly graduates

30,000 enrolled
students in related
study fields



Labour Force & Education in Life Sciences

Companies active in Healthcare & Lifesciences are highly dependent on a skilled workforce. Slovak labour force with a medical and pharmaceutical background represents a combination of cost-effectiveness and high education levels and thus ensures competitiveness and high added value.



Source: Slovak Centre for Scientific and Technical Information, 2023

Average Salaries in the Pharmaceutical Industry



Salaries in the Pharmaceutical industry do not differ in a significant way from region to region. What counts more is the experience and local competition of the employees with a pharmaceutical background.

POSITION	MARKET MEDIAN — Gross Salary Levels (EUR/month)						MIN. REQUIRED ACADEMIC DEGREE
	WESTERN SLOVAKIA		CENTRAL SLOVAKIA		EASTERN SLOVAKIA		
	min	max	min	max	min	max	
Pharmaceutical Technician	1,200	1,500	1,200	1,400	1,100	1,400	secondary school
Responsible Pharmacist	1,600	2,400	1,700	2,200	1,700	2,300	university
Pharmacist	1,500	2,000	1,500	2,000	1,500	1,900	university
Pharmaceutical Laborant	1,100	1,800	1,000	1,600	1,000	1,800	secondary school
Quality Control Analyst	1,300	1,700	1,200	1,500	1,200	1,500	secondary school
Product Manager	3,200	3,600	3,000	3,500	3,000	3,500	university

Source: Balanced HR, 2024



Average gross salaries reflect the location in Slovakia, the experience and seniority of the employee, the job position and many other relevant factors. For the first half of 2024, the average salary increase in this sector was 4.95%, which reflects the current trend in the labour market and unemployment rate in Slovakia.

Healthcare & Pharmaceutical Innovations



TRISOMY TEST

Team of Slovak researchers invented a non-invasive Down syndrome diagnosis for pregnant women.

MEDICAL 3D PRINTING

Biomedical Engineering promotes 3D printing in medicine. The implant was already used on a patient after serious skull damage.



MULTIPLEXDX

Biotech innovative company performing personalized molecular diagnostics. MultiplexDX's high quality solutions refer to the most precise sequencing analysis, the simplest and gel-free sequencing protocol, the simplest FISH protocol, the most stable and specific FISH probes, the most accurate cancer profiling and biomarker quantification. Furthermore, MultiplexDX developed LAMP-testing solution (COVID-19 diagnostic test) which achieves an accuracy approaching PCR test.

Innovative company developing glycan-based, accurate and non-invasive tests for cancer diagnostics. Portfolio of products and solutions consists of glycodecode deciphering done by analysis of glycan changes on specific proteins.

GLYCANOSTICS



DNA ERA

DNA ERA

The company has a team of geneticists, data analysts, physicians, nutritional experts, sports trainers whose provide DNA analysis of your body in the fields of genetic predispositions which will allow you to get to know your body and help you understand your health and physical limits.

MENTEGRAM

Mentegram, focused on mental health solutions, provides a cloud-based assessment and patient engagement platform that is accessed through a web dashboard and mobile apps by healthcare professionals and patients. Clinicians are able to conduct digital patient screenings, automatic scoring and reporting, track treatment plans digitally and seamlessly process information for reimbursement claims in real time.



Mentegram



Laboratories and Providers of Laboratory Diagnostics

Slovak laboratories are accredited according to the international standards for medical laboratories in the following fields — clinical biochemistry, hematology, immunology, medical genetics and clinical microbiology. Implementation of the latest technology and know-how, information technologies and full automation into diagnostic processes, have increased their competitiveness to the level of other global players in the same field.

TOP PROVIDERS OF LABORATORY DIAGNOSTICS

COMPANY NAME	LOCATION	SALES REVENUE (MIL. EUR)	EMPLOYEES
Unilabs Slovensko	Martin	79.78	874
Medirex	Pezinok	78.39	1.259
KLINICKÁ BIOCHÉMIA	Žilina	19.96	214
Synlab Slovakia	Bratislava	16.20	266
Martinské bioptické centrum	Martin	9.75	80
CYTOPATHOS	Bratislava	9.62	109
Medicyt	Pezinok	9.59	99
Analyticko-diagnostické laboratórium a ambulancie	Prešov	4.47	72
AnalytX	Bratislava	3.89	60
Laboratóriá Piešťany	Piešťany	3.49	41

Source: FinStat 2024 (data for 2023)

Slovakia's R&D Potential in the Healthcare & Pharmaceutical Industry

Science parks and research centers play an important role in the national innovation system by stimulating the cooperation between the academic and business environments and enabling a swift knowledge transfer.



UNIVERSITY SCIENCE PARK FOR BIOMEDICINE

- cooperation between the Slovak Academy of Sciences and the universities
- capacity of 500 researchers



BioMed
JLF UK v Martine

CENTER FOR BIOMEDICINE OF THE CITY OF MARTIN

- research facility of the Jessenius Faculty of Medicine
- focus on neurosciences, oncology, respirology & molecular medicine



UNIVERSITY MEDICAL SCIENCE PARK IN KOŠICE

- common project of the local universities
- integration of biomedical research throughout Eastern Slovakia



COMENIUS UNIVERSITY IN BRATISLAVA SCIENCE PARK

Focus on biomedicine, biotechnology, enviro-medical and societal challenges of the 21st century in matters of bioethics, law and socio-economic rights.



UNIVERSITY SCIENCE PARK TECHNICOM IN KOŠICE

Cooperation of the universities in Prešov and Košice focused on application of innovations and cooperation of the academic and business environments.



RESEARCH CENTER AGROBIOTECH IN NITRA

Regional competence center for agrobiolgy, agroecology, biotechnologies and bioenergetics.



UNIVERSITY SCIENCE PARK CAMBO IN TRNAVA

Research park of the Slovak Technical University focused on the field of material research based on ion & plasma technologies.



RIS3 — National R&D Specialization Strategy

Biomedicine & biotechnology are one of the three priorities of the R&D strategy of the Slovak Republic.

Biomedicine and biotechnology focus on new diagnostic and therapeutic approaches for cancer, heart disease, blood vessels and brain, endocrine and metabolic disorders, infectious diseases and allergies, pharmacological and industrial biotechnologies.

Almost 2,000 researchers work in the segment and they publish more than one fourth of all Slovak publications in international scientific journals. The results are used in the field of the diagnostic, prevention and therapy of diseases in cooperation with three medical faculties.

Slovak Academy of Sciences

Slovak Academy of Sciences (SAS) is a public research institution established in 1942, which undertakes autonomous non–university scientific research in Slovakia which is primarily funded from public finances.

The research is highly systematic and concentrated which allows it to be connected to global trends in the development of human knowledge. The perspectives gained from research undertaken at the SAS are based on evidence and are qualitatively comparable to research undertaken abroad.

The SAS consists of 47 organizations operating in 2 major research cities— Bratislava and Košice. The Academy publishes 73 scientific and professional journals. Currently it employs a total of 2,147 scientists, of which 212 are D.Sc. and 1,935 C.Sc. and PhD. In 2021, SAS organizations had a total of 492 PhD students.

SAS organizations are actively involved in higher education. As external educational institutions, SAS organizations participate in the implementation of PhD study programs at 11 universities. The most important partners of SAS institutes in doctoral studies are the Comenius University and the Slovak Technical University, which are ranked best in international rankings. In addition, the employees of the SAS acted as supervisors for 66 PhD students and 785 students of master and bachelor degree at universities.

SAS INSTITUTES UNDER THE SECTION LIFE SCIENCE, CHEMICAL, MEDICAL & ENVIRONMENTAL SCIENCES

MEDICAL SCIENCES

Biomedical Research Center SAS

- Cancer Research Institute
- Institute for Clinical and Translational Research
- Institute of Experimental Endocrinology
- Institute of Neurobiology
- Institute of Virology

Centre of Experimental Medicine SAS

Institute of Neuroimmunology

BIOLOGICAL AND CHEMICAL SCIENCES

Centre of Biosciences SAS

- Institute of Chemistry
- Institute of Inorganic Chemistry
- Institute of Molecular Biology
- Institute of Zoology
- Polymer Institute

AGRICULTURAL AND VETERINARY SCIENCES

- Institute of Forest Ecology
- Institute of Landscape Ecology
- Institute of Parasitology
- Plant Science and Biodiversity Center SAS

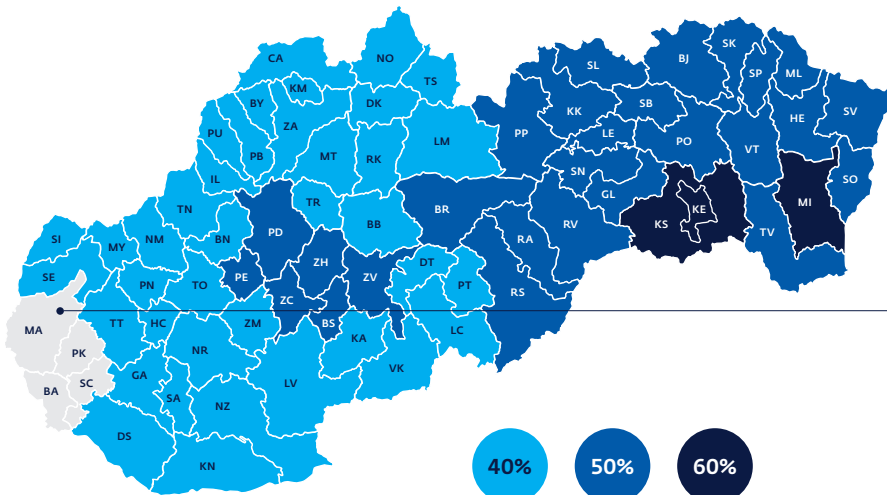
Investment Incentives

The primary goal of the investment incentives is to motivate investors to place their new projects in regions with higher unemployment and to attract projects with higher added value.



Districts in Bratislava region are excluded from the investment aid scheme

MAXIMUM REGIONAL INVESTMENT AID INTENSITY



ELIGIBLE PROJECTS

The Act on Investment Incentives divides the projects, which may be supported, into four categories:

- industrial production
- technology centers
- combined projects of industrial production and technology center
- shared services centers

ELIGIBLE COSTS

- Costs of land acquisition
- Costs of buildings acquisition & construction
- Costs of new technological equipment and machinery acquisition
- Intangible long-term assets — licences, patents, etc.
- Rent of new land/building
- or
- Total wage costs of all new employees calculated over a period of 2 years

+10% additional incentives for medium-sized enterprises

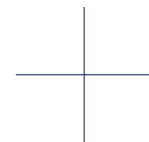
+20% additional incentives for small and micro-sized enterprises

+10% additional incentives for projects related to critical technologies

FORMS OF INVESTMENT INCENTIVES

- Corporate income tax relief
- Cash grant
- Contributions for the newly created jobs
- Rent/Sale of real estate for a discounted price

Please contact us at invest@sario.sk for more information (including minimum conditions and critical technologies definition).



Positive regional contribution of a new investment projects shall be concluded based on these categories — investment location, number of jobs created, average gross monthly salary of new employees, expected added value and possible qualification of a project respecting definition of a priority area



AIM INVESTMENT AWARDS UAE 2022

CEE & TURKEY REGION
Best Investment Promotion Agency in 2022



SARIO Profile

Slovak Investment and Trade Development Agency (SARIO) is a governmental investment and trade promotion agency of the Slovak Republic. The agency was established in 2001 and it operates under the Ministry of Economy of the Slovak Republic.

01 INVESTMENT SERVICES

FOR POTENTIAL INVESTORS

- investment environment overview
- organization of the investor´s visits of Slovakia
- starting a business consultancy
- sector and regional analyses
- investment incentives consultancy
- site location & suitable real estate consultancy

FOR ESTABLISHED INVESTORS

- identification of local suppliers, service providers
- assistance with expansion preparation and execution
- assistance with Industry 4.0 solutions and R&D implementation

02 FOREIGN TRADE SERVICES

IF YOU ARE LOOKING FOR

- Slovak supplier or sub-contractor
- information about Slovak export/trade environment
- sourcing opportunities
- forming a joint venture, production cooperation or other forms of partnership with a Slovak partner

SERVICES FOR EXPORTERS

- information on foreign territories
- customized search for foreign partners
- online database of business opportunities
- export Training Centre
- subcontracting assistance

03 SLOVAK SPACE OFFICE

FOR SLOVAK ENTITIES

- tailor-made sector entry consultancy
- startup creation through hackathons and incubation programs
- cooperation opportunities through matchmaking events
- internationalization of the Slovak space companies and research institutions

FOR FOREIGN PARTNERS

- customized search for local partners
- assistance with establishing branch in Slovakia
- cooperation on space industry events



CONTENT
ADVISOR

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TALK TO US TODAY!**

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