

# Life Sciences



**About us:** Invest in Tuscany is the regional referral system to attract foreign direct investments in Tuscany.

It acts as **the point of reference for national and international companies** that want to invest in Tuscany, providing assistance and promoting investment opportunities.



**Mission:** to connect Tuscany to the international business community, assisting potential investors to build and develop their business in Tuscany. In particular, Invest in Tuscany provides useful and strategic information, it supports investors in the analysis and evaluation of the territory, it assists companies that intend to establish or expand in Tuscany in every stage of the investment process.

#### Services offered:



- **Pre-establishment support.** Invest in Tuscany gives information to help understanding the local economy, through the research of regional macroeconomic data, trend analysis of growth and foreign trade.
- **Support during the settlement.** Support in the search of possible locations through the network of contacts with the production districts, incubators, technological parks and real estate brokers.
- **Post-establishment support.** Facilitating business growth: the office provides support to corporations that have started activity in Tuscany with fast track procedures in obtaining permits for expansion as with the identification of possible local partners.

**More info:** [www.investintuscany.com](http://www.investintuscany.com)

# The heart of Italy and Europe

invest in tuscany

## TUSCANY IN KEY FIGURES<sup>1</sup>



Capital City: Florence  
Area: 22,994 km<sup>2</sup>  
3.7 Mln inhabitants  
(2023)



+337k companies  
+7.4k local units of foreign and Italian  
multinationals  
+1.6 Mln people employed



115 €Bn of GDP (2021)  
54.8 €Bn in Export (2022)  
31,247 € GDP per capita (2021)

- ▶ **3 main logistic centres**  
(Livorno, Arezzo, Prato)

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- ▶ **Major Italian highway (A1)**  
connecting Milan-Rome-Naples
- ▶ EU **“Scandinavian-Mediterranean Core Network Corridor”** linking Baltic Sea-Southern Italy-Malta

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- ▶ **1 main commercial port** (Livorno)

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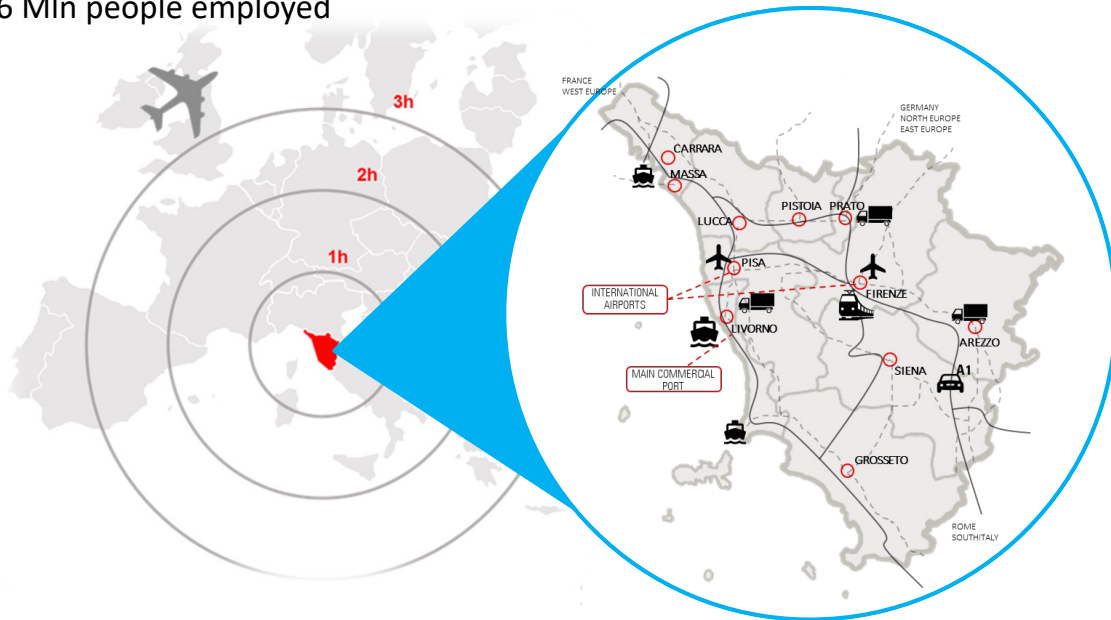
- ▶ with direct link to major Mediterranean ports

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- ▶ **2 national ports** (Piombino, Carrara)
- ▶ **2 International Airports** (Florence and Pisa)

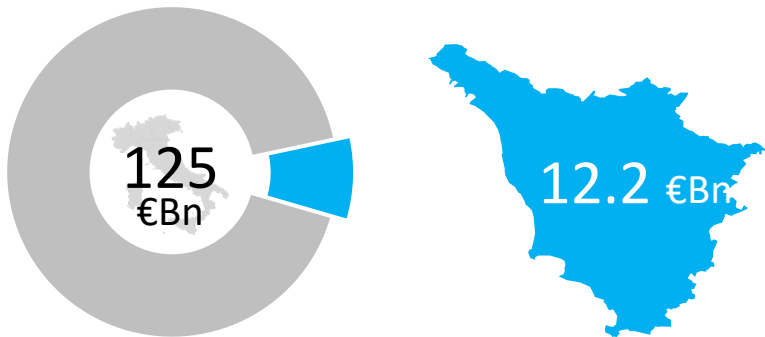
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- ▶ **High-speed train**
  - 1:30h from Florence to Rome
  - 1:40h from Florence to Milan

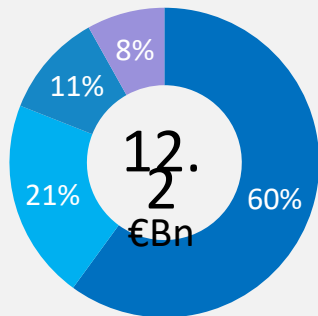


# Life Sciences taxonomy and relevance

Tuscany represents **9,7%** of the Italian Life Sciences Turnover.



## SUBSECTORS DETAIL<sup>1</sup>



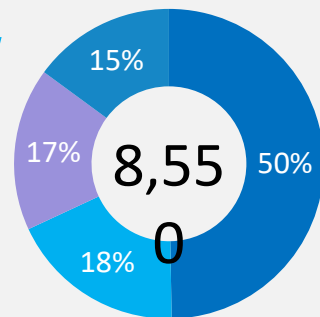
### Turnover

Biotech-Pharma contributes to Life Sciences Turnover by 60% and together with Distribution/Trade, they contribute to more than 80% of sector Turnover.

### Companies

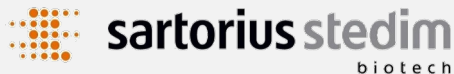
Biotech-Pharma & Distribution/Trade are more concentrated, Healthcare & Medtech are more fragmented with smaller companies.

- Biotech-Pharma
- Distribution/Trade
- Healthcare
- Medtech



1. ATECO categories: Biotech-Pharma (categories included: 21 - 72.11 - 46.18); Distribution/Trade (categories included: 46.46 - 47.73 - 47.74); Healthcare (categories included: 86 - 87 - 96,04); Medtech (categories included: 26.6 - 32.5 - 33.13); Source: Registro delle Imprese and AIDA database Bureau van Dijk, 2023. Turnover refers to 2022, whilst the number of active companies refers to 2023. 2. 2022 data. Source: Istat-Coeweb database, 2023.

# Foreign players & multinationals



# Students & main university systems



## 4 major University Poles



University of Florence



University of Pisa



University of Siena



Sant'Anna School of Advanced Studies



**+116,000**  
STUDENTS  
IN TUSCANY <sup>2</sup>

**2,800**  
Chemical science <sup>2</sup>

**+13,700**  
Medical science <sup>2</sup>

**+9,400**  
Biological science <sup>2</sup>

## Life Sciences Majors

### MEDICAL-PHARMACEUTICAL BIOTECHNOLOGIES

IMMUNOLOGICAL TECHNIQUES  
CELL AND MOLECULAR BIOLOGY  
HUMAN AND MEDICAL GENETICS  
APPLIED AND EXPERIMENTAL MICROBIOLOGY  
AND MORE...<sup>3</sup>

### HEALTH PROFESSIONS OF REHABILITATION SCIENCES

APPLIED MEDICAL SCIENCES  
MANAGEMENT SCIENCES  
MANAGEMENT AND ASSISTANCE OF  
THE SURGICAL PATIENT  
AND MORE...<sup>4</sup>

### GENETIC COUNSELLORS

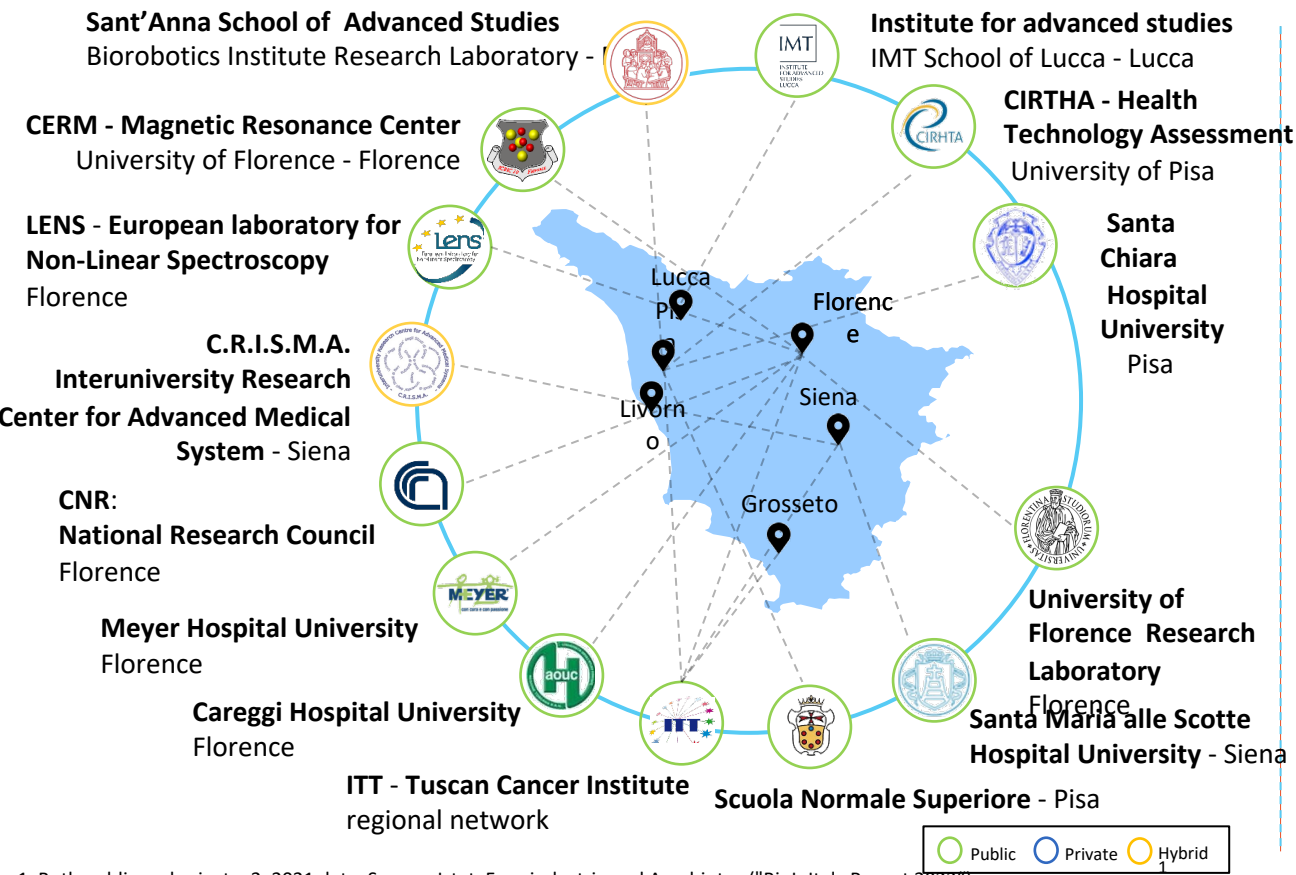
GENE THERAPY  
HUMAN GENETICS  
PSYCHOLOGICAL ISSUES IN COUNSELLING  
MEDICAL, GENETICS AND CLINICAL TRIALS  
AND MORE...<sup>5</sup>

### BIONICS ENGINEERING

BIONIC SENSES  
NEURAL PROSTHESES  
APPLIED BRAIN SCIENCE  
BIOMECHANICS OF HUMAN MOTION  
AND MORE...<sup>6</sup>

1. Source: Toscana Open Research (Regione Toscana), 2023. 2. Source: Evoluzione degli iscritti per classe di laurea (Toscana open Research), 2023; 3. Source: Università degli studi di Firenze homepage; 4. Source: Università di Pisa homepage; 5. Source: Università di Siena homepage; 6. Source: Sant'Anna School of Advanced Studies homepage.

# Network of research centers & laboratories



## Innovation



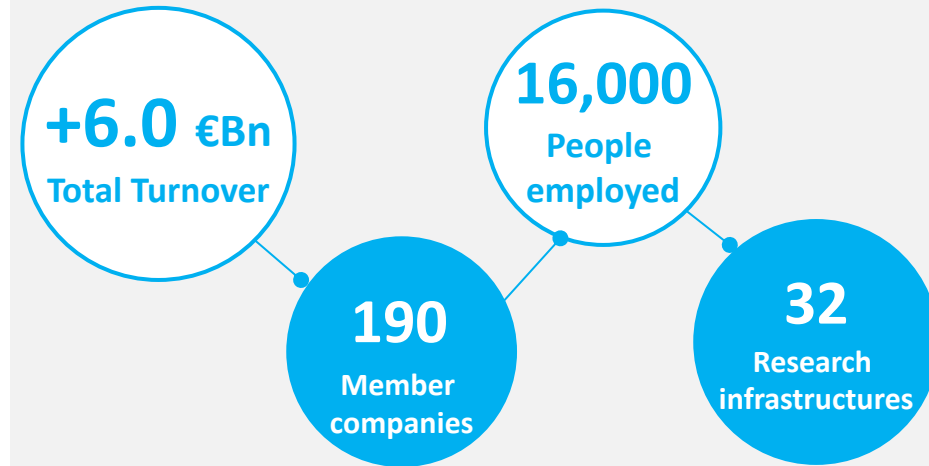
Tuscany is the 4<sup>th</sup> region in Italy for R&D researchers (+18,000) and R&D investments by universities. Tuscan Pharmaceutical companies are **highly specialized in R&D**: researchers and R&D investment are, respectively, 17% and 18% of the national total. Moreover, with regard to **Biotech** subsector, Tuscany is among the four Italian regions with the highest number of companies (6% of the national total), revenues (11%) and R&D investments (21%) and it's worldwide recognized for **research and high quality** in the fields of **vaccines and human health**. In particular, Florence, Lucca, Siena, Pisa are the flagship of the regional pharmaceutical sector. **Florence** hosts important companies that produce medicines for international markets. **Lucca**, is an international hub for the development, production and distribution of blood products. **Siena** is an important center for

1. Both public and private. 2. 2021 data. Source: Istat, Farmindustria and Assobiotec ("BioInItaly Report 2023"),

# Tuscany Life Sciences Cluster



The **Tuscany Life Sciences Cluster** groups all of the public and private subjects operating in various capacities in the sectors of biotechnology, pharmaceuticals, medical devices, nutraceuticals, cosmeceuticals and ICT applied to the Life Sciences. The Cluster was created in 2011 thanks to the Tuscany Region with the goal of contributing to the growth of Region's competitiveness by **planning integrated research and development activities around innovative projects** and by creating a network of excellence of companies in the field of research and technology transfer.



The actors of the Tuscany Life Sciences Cluster are affiliated businesses (startups, spin off, SMEs and **major players in the pharmaceutical industry**); **Tuscany Universities** (Florence, Pisa, Siena); School of Advanced Studies (the Sant'Anna and Pisa Normale Schools for Advanced Studies and the IMT Institute for Advanced Studies of Lucca); **Institutes of CNR**; the University Hospitals; the local health authorities; foundations, service



# TLS Bioincubator: innovation ecosystem



According to:



The **TLS (Toscana Life Sciences) Bioincubator** is located in Siena and it's composed by a team of professionals with scientific and industrial backgrounds who are specialized in technology transfer processes, as well as a network of experts and consultants. The incubator **supports companies and nonprofit research groups at every phase of their development** and represents a point of reference for firms that need to realize their ideas of business.

The structure offers spaces (offices and laboratories), modern technological facilities and specialized services: all the tools to grow and be able to compete on the market, with all its risks and opportunities.

In 2022, the Bioincubator **total turnover amounted**





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Tuscany,  
for centuries  
in the future

Tuscany.  
Discover a region  
filled with  
opportunity.

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