

THE TRANSPORT OF PHARMACEUTICAL PRODUCTS IN EUROPE

**An analysis of trade
flows in the pharma
sector within the EU-27**

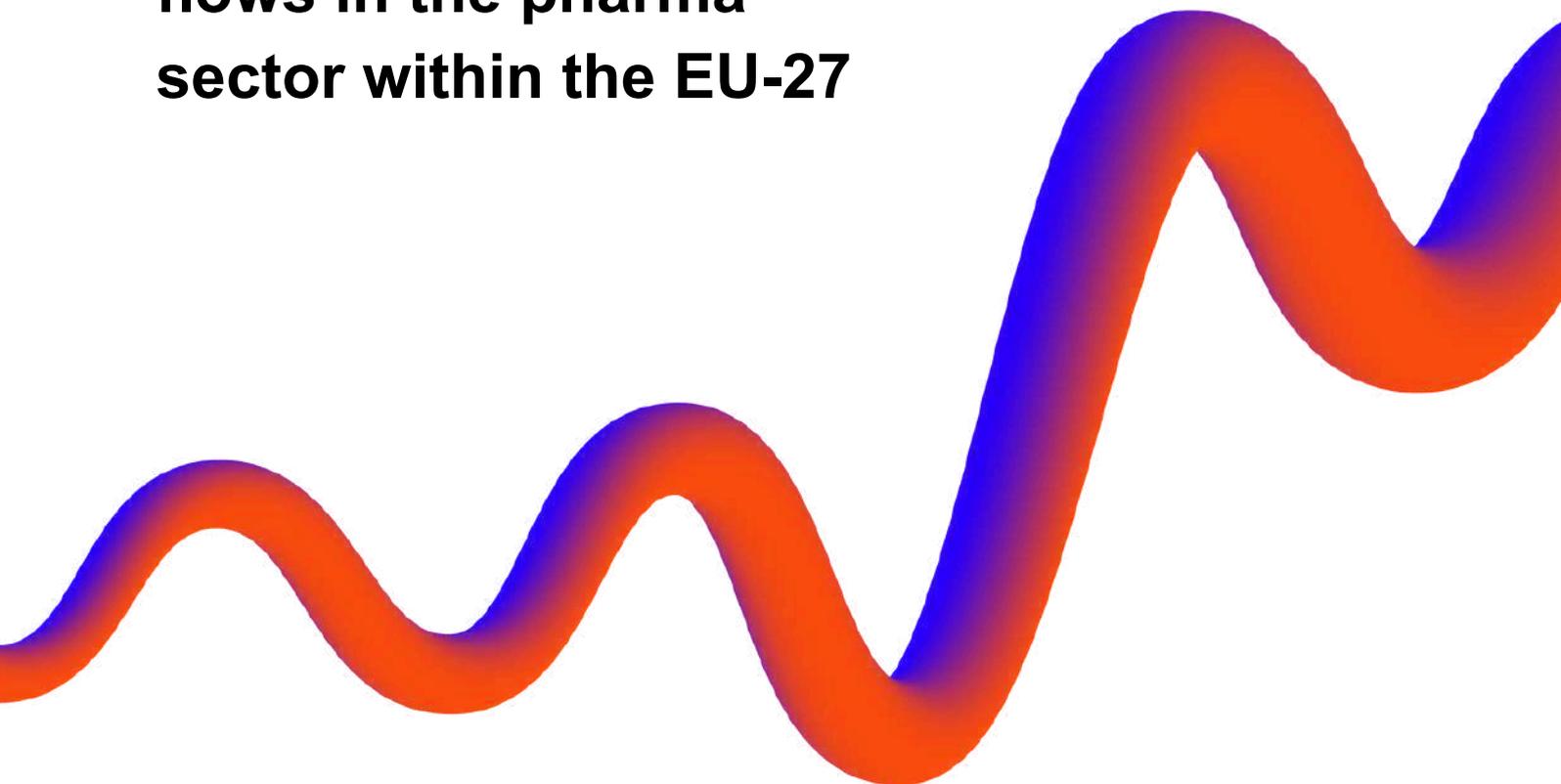


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Data to interpret the logistical complexity of the pharmaceutical market

The European pharmaceutical industry is at the centre of one of the most dynamic logistics networks in the world. In order to understand it better, we at Logista Freight have prepared this report with the aim of clarifying the dense network of trade flows that defines the sector, and to offer the players in the sector a practical tool for analysing the trends of the European market with the maximum amount of information.

An example of this complexity is the production of vaccines. Producing a single dose requires an international supply chain that links components from different parts of the world: active ingredients from China, excipients from the United States, glass containers from Germany, and so on. This network reflects not only the global scope of the industry but also its collaborative nature and reliance on robust logistics to ensure the availability of essential medicines for the general public.

This document focuses on the European Union to provide a comprehensive overview of trade movements valued at 250 billion euros and logistics traffic totaling 3.3 million tonnes. Through rigorous data analysis, we break down the flows and patterns that define the production and distribution of pharmaceutical products, offering key insights into what, how, and where pharmaceutical products move within the region.

In addition, we leverage our expertise as logistics operators specializing in the pharma sector to explore strategic issues for the industry, such as the projected growth of refrigerated transport. We highlight the specific advantages of full-load transport and groupage, and present the network of solutions and technologies that Logista Freight provides to the industry.

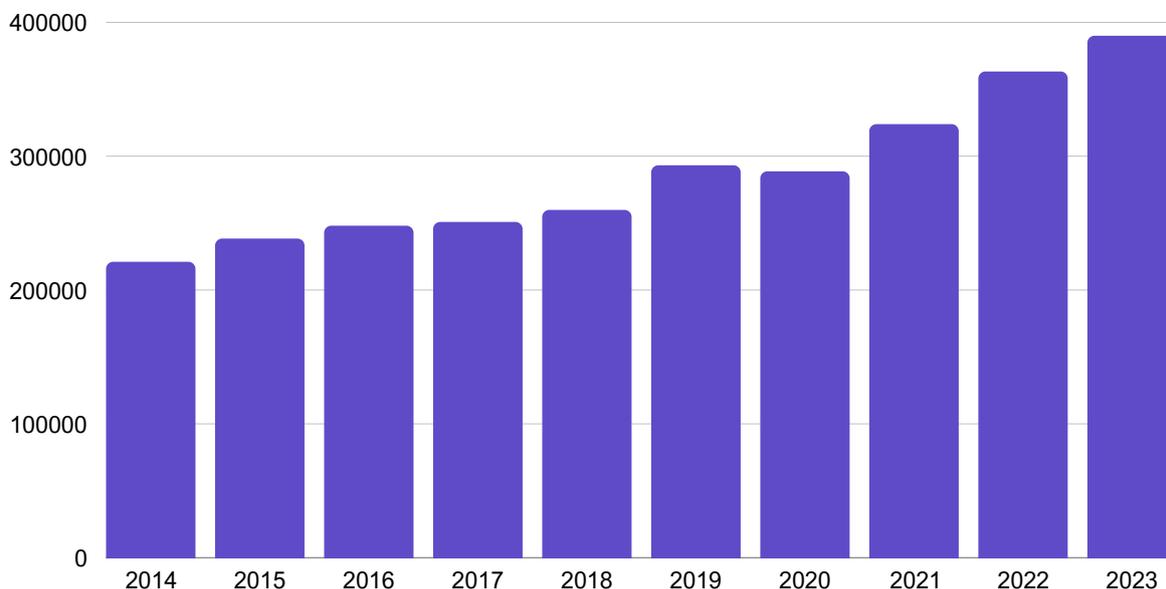
We invite all stakeholders in the pharmaceutical sector to explore these pages, particularly purchasing and logistics managers in laboratories, hospitals, distributors, and related companies. We hope this report will help you discover new logistical and commercial opportunities in the EU market. Together, we can continue building more efficient, resilient, and sustainable supply chains.

Álvaro González-Escalada
General Manager of Logista Freight



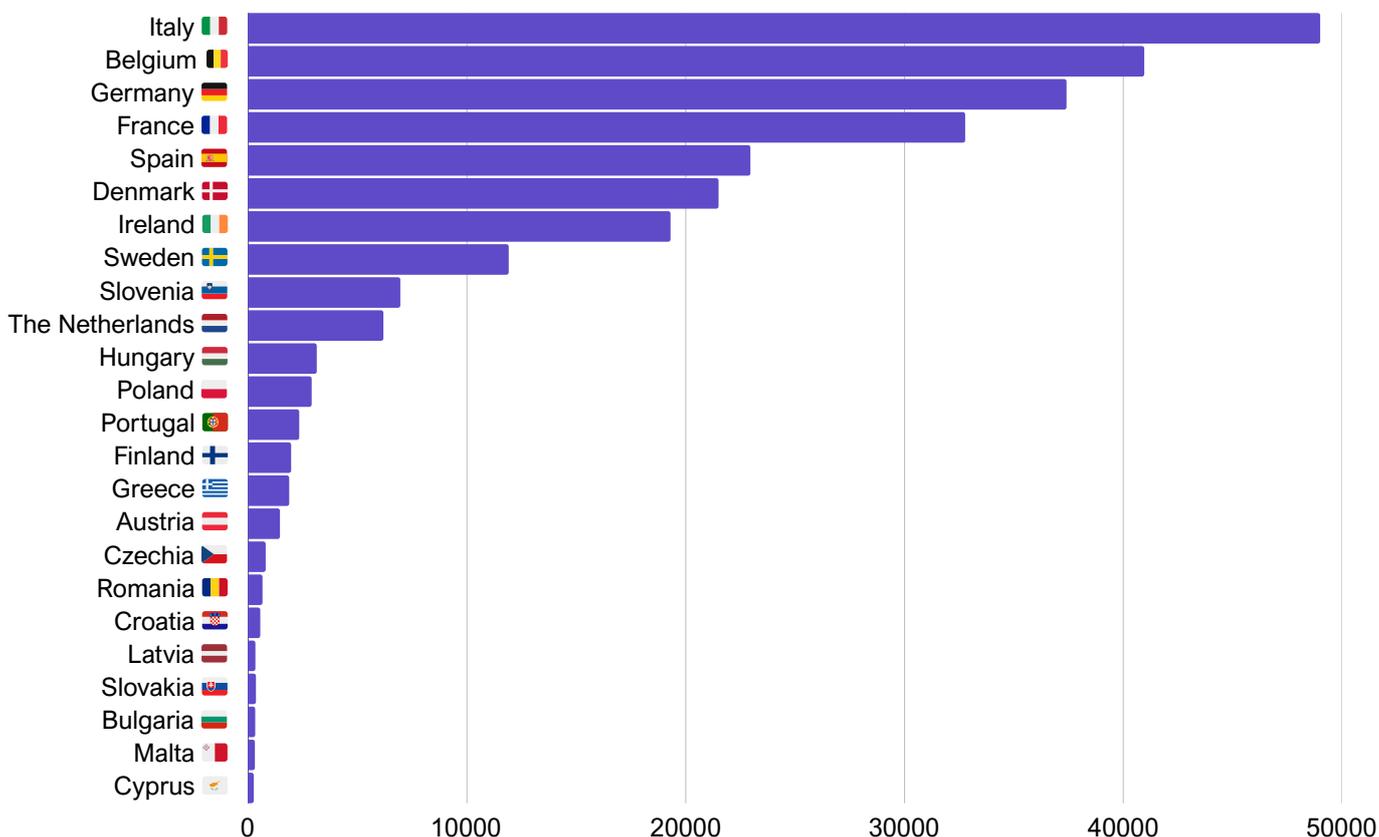
Overview of pharmaceutical production in the EU-27

Evolution of production over the last decade



Data in millions of euros. Source: EFPIA

Leading production countries



Data in millions of euros for 2023. Source: EFPIA

The European pharmaceutical industry in numbers

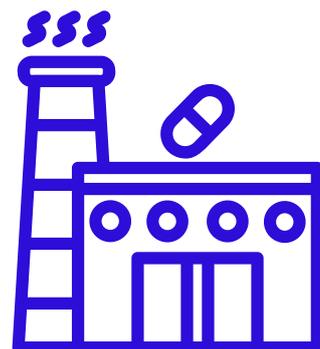
-  4,047 companies
-  900,000 employees
-  41.67 billion euros turnover
-  50 billion euros in R&D investment
-  390 billion euros in production value
-  290 billion euros of market value
-   275.84 billion euros of exports to the rest of the world
-   119.08 billion euros of imports from the rest of the world
-   251.62 billion euros of exports between EU-27 countries

A growth engine for the European economy

The pharmaceutical industry in the EU-27 produces enough medicines to meet the needs of its citizens and exports more products to the rest of the world than it imports. It is a strategic sector for Europe's healthcare system and economy, with a robust business foundation that drives turnover, investment, and job creation.

An analysis of the last ten years highlights the strength of this market, with a cumulative growth of 76% in the value of pharmaceutical production. This dynamism has been fueled by Europe's consolidation as a leader in innovation, thanks to annual investments in research and development totaling 50 billion euros.

The pharmaceutical industry's contribution to the European economy is undeniable. With over 4,000 active companies, the sector directly employs 900,000 people and generates more than 2.3 million indirect jobs, creating a high-quality professional network. The gross value added per employee amounts to 225,000 euros, three times the average for the European economy, making this sector a benchmark for efficiency and competitiveness.



EU exports to and imports from the rest of the world

How much does the EU-27 buy from and sell to the rest of the world?

 →  Exports: 275.84 billion euros
 →  Imports: 119.08 billion euros

Where does the EU-27 buy pharma products?

 →  United States: 47.01 billion euros
 →  Switzerland: 38.46 billion euros
 →  United Kingdom: 8.16 billion euros
 →  South Korea: 5.22 billion euros
 →  China: 4.40 billion euros

Where does the EU-27 sell pharma products?

 →  United States: 92.42 billion euros
 →  Switzerland: 42.69 billion euros
 →  China: 21.07 billion euros
 →  United Kingdom: 17.02 billion euros
 →  Japan: 9.59 billion euros

Data for 2023. Source: Own compilation based on data from the European Commission.

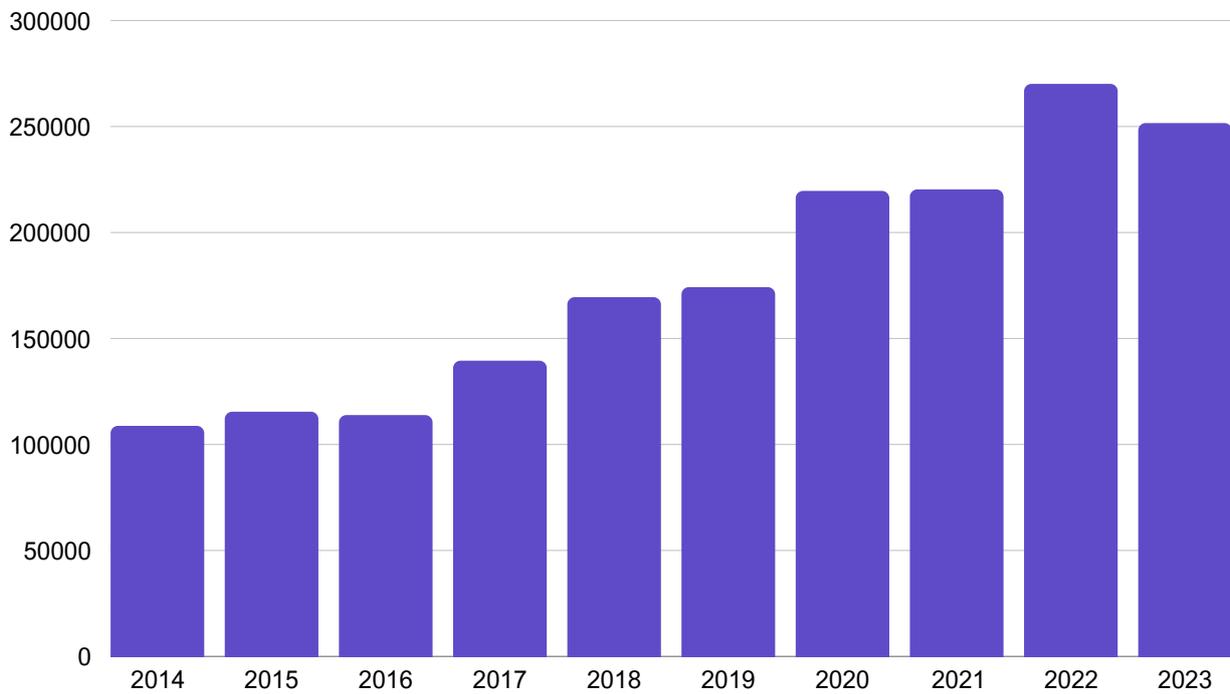
The European Union is consolidating its position in international trade in the pharmaceutical market, with a positive balance reflecting the competitiveness of European products globally.

The United States is the EU's largest trading partner, accounting for 25% of exports and 13% of imports. Switzerland is the second-largest source and destination of EU-27 production, while the United Kingdom and China also maintain strong positions in the rankings of international purchases and sales.

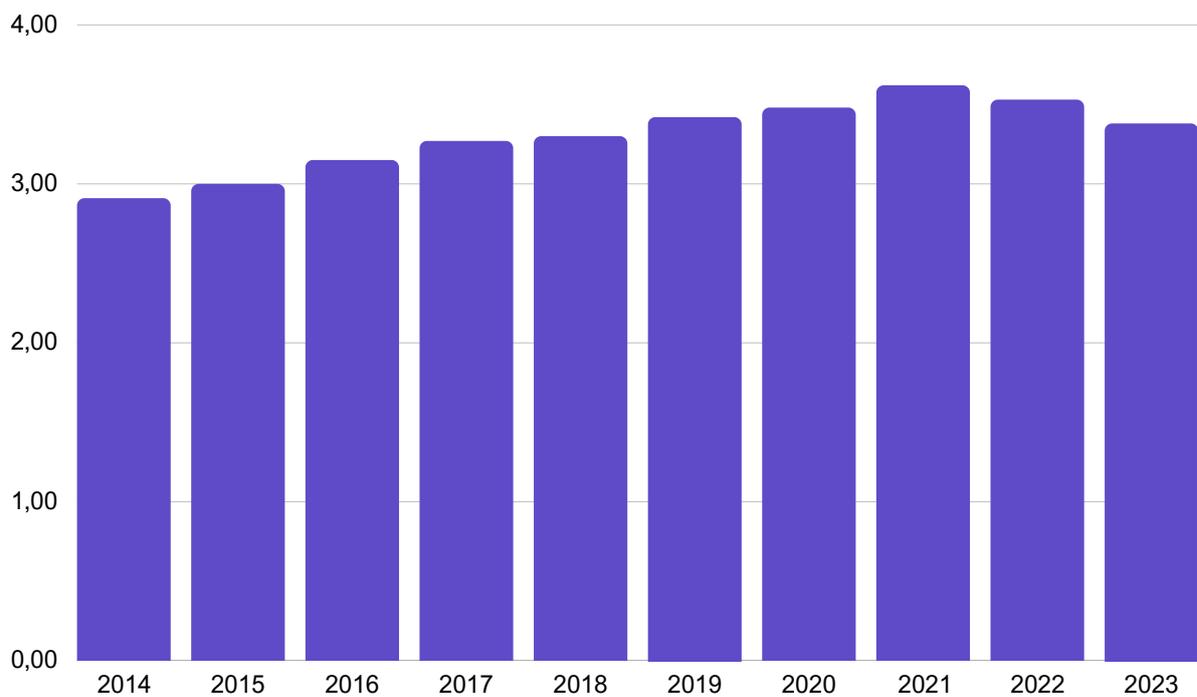
The overlap between exporting and importing countries reflects the high degree of global interdependence in the pharmaceutical sector. Many pharmaceutical products, especially the most innovative ones, result from an international collaborative network in which multiple components, active ingredients, and technologies from different markets are exchanged before becoming a final product ready for global distribution.

These trade flows add complexity to the pharmaceutical supply chain and highlight the importance of logistics for products that must meet strict temperature and safety standards, requiring a highly specialized logistics infrastructure and transport network.

Evolution of pharmaceutical trade in the EU



Data in millions of euros. Source: Own compilation based on data from the European Commission



Data in millions of tonnes. Source: Own compilation based on data from the European Commission

What is the volume of pharma products moving between EU-27 countries?

- € 251.62 billion euros, 6.1% of the EU-27 total
- 🚚 3.38 million tonnes, 0.2% of the EU-27 total

The analysis of intra-European trade in pharmaceutical products reveals a highly interconnected region, with its evolution over the last decade showing a rise from just over 100 billion euros to more than 250 billion euros. This leap has accelerated since the impact of COVID-19, resulting in increases of more than 20% in both 2020 and 2022.

In terms of volume, however, the sector's trade flows have remained relatively stable, showing an evolution of 15% over the decade. This stability suggests an increase in the value per kilogram of products, particularly in categories of medicines linked to the pandemic, as we will see below.



Which countries lead the pharma trade?

Main countries of origin of intra-EU trade in pharma products

-  Germany: 50.64 billion euros
-  Ireland: 36.34 billion euros
-  Belgium: 33.07 billion euros
-  Netherlands: 29.67 billion euros
-  Italy: 21.84 billion euros

Main destination countries for intra-EU trade in pharma products

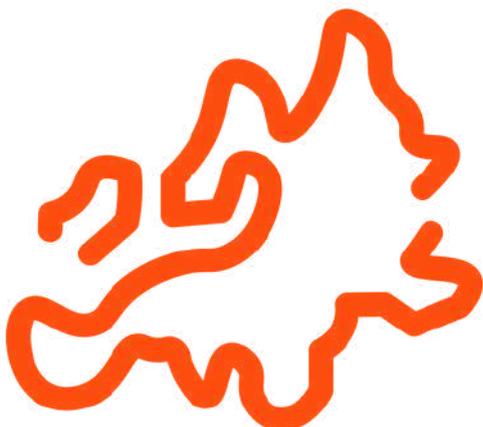
-  Germany: 51.21 billion euros
-  Belgium: 40.45 billion euros
-  Netherlands: 28.11 billion euros
-  France: 24.53 billion euros
-  Italy: 23.46 billion euros

Data for 2023. Source: Own compilation based on data from the European Commission.

EU trade in pharmaceutical products is characterized by its concentration in a few key countries, which are major producers and have become strategic hubs for the distribution of medicines on the continent. This is reflected in the indices of the main origins and destinations of trade, where Germany, Belgium, the Netherlands and Italy show their leadership in both exports and imports.

Germany stands out as the main player in EU flows. Its exceptional pharmaceutical industry—the third largest in the EU—and the size of its market make it the leading sender and receiver of pharmaceutical products within the EU, with volumes reaching approximately 50 billion euros per year.

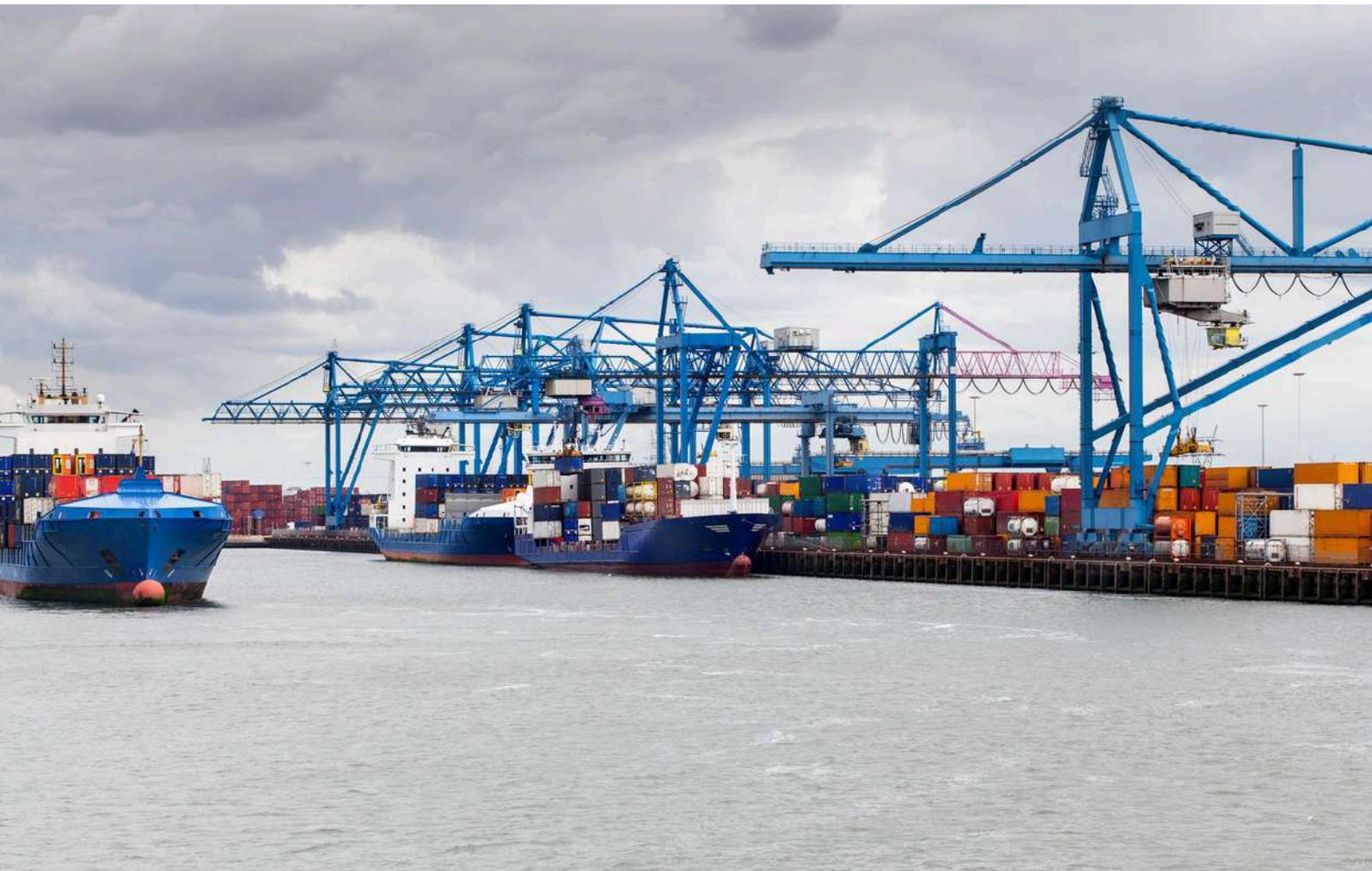
The countries that follow in the ranking of trade flows also have the largest industrial capacity in the pharma sector. This indicates that their production models are designed not only to meet their domestic demand, but also to interconnect with the whole continent and become part of a global network integrating specialized actors across the industry.



The 'Rotterdam effect', the Netherlands' logistical trump card

The Netherlands is an exception to the industrial dominance of the countries leading pharmaceutical trade flows on the continent. Although it ranks tenth in terms of pharmaceutical production, it has become one of the main distribution hubs for the sector in Europe, partly due to the so-called 'Rotterdam effect,' also known as the 'Rotterdam-Antwerp effect'.

The European Commission warns of a distortion in the official statistics regarding goods passing through major European ports to their final destinations. Thus, pharmaceutical products transiting through Rotterdam or Antwerp on their way may be attributed to the Netherlands or Belgium, potentially inflating the trade flow figures for these countries.



Key pharma trade flows in Europe

In billions of euros

 Ireland	→  Belgium: 12.31
 Germany	→  the Netherlands: 10.22
 The Netherlands	→  Germany: 9.60
 Belgium	→  Germany: 9.16
 Ireland	→  the Netherlands: 8.75
 Ireland	→  Germany: 7.88
 Germany	→  Italy: 7.71
 Italy	→  Belgium: 6.80
 Germany	→  Belgium: 6.18
 Germany	→  France: 5.83

In tonnes

 The Netherlands	→  Belgium: 115,650.41
 France	→  Germany: 106,820.99
 Germany	→  France: 100,201.24
 Belgium	→  the Netherlands: 73,055.76
 The Netherlands	→  Germany: 56,336.16
 Italy	→  France: 55,046.11
 Ireland	→  Belgium: 52,258.97
 Belgium	→  France: 50,233.97
 Germany	→  Italy: 44,224.82
 Spain	→  Germany: 43,936.18

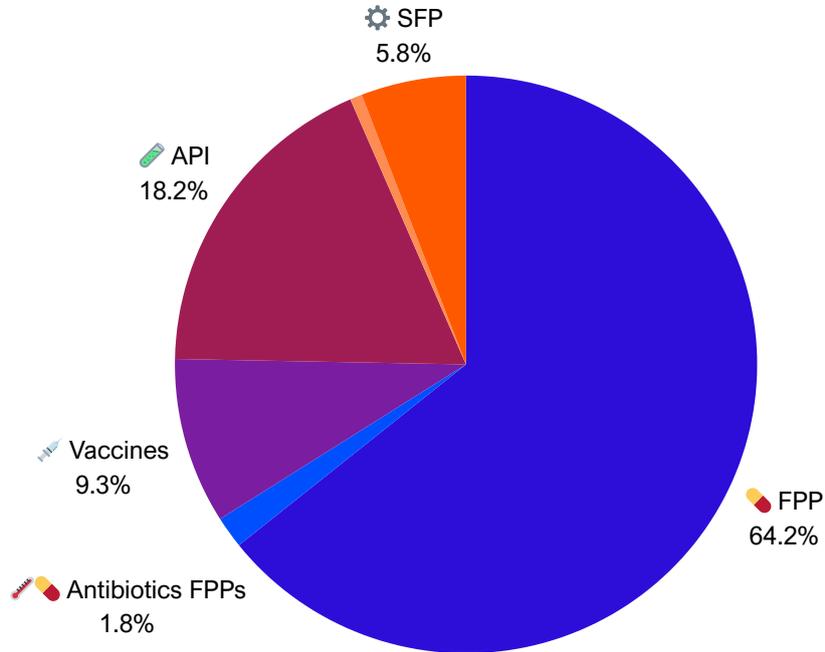
An analysis of key pharmaceutical products trade flows within the EU-27 reveals the dominance of Central Europe. Specifically, Germany, Belgium, the Netherlands and France account for 15 of the top 20 origins and destinations, forming a crucial trade axis for the pharma industry on the continent. This region also hosts significant trade with Switzerland, a pharmaceutical giant and the EU's second-largest partner.

The concentration of flows is particularly pronounced in Germany, with up to 7 segments among the top 10 in the EU in terms of economic value, both for exports and imports of medicines. Belgium and the Netherlands together account for another 7 flows, leveraging their industrial capacity and the efficiency of their ports, as highlighted by the 'Rotterdam effect.'

The analysis of these services highlights Ireland as a particularly interesting case in EU trade, as it contributes to three of the flows with the highest economic value, yet participates in only one of the highest tonnage sections. This difference is due to its specialization in the production of high-value-added medicines and biological products, such as vaccines and APIs, which, while generating a significant economic impact, have a low relative weight compared to other products.

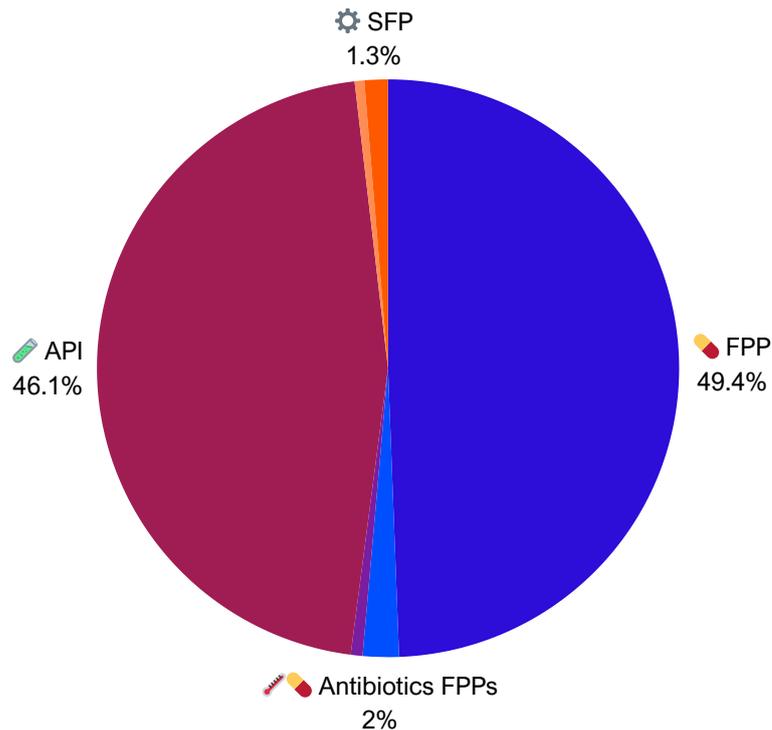
Which products are the most exported?

In economic value



Data in % for 2023. Source: Own compilation based on data from the European Commission

In weight



Data in % for 2023. Source: Own compilation based on data from the European Commission

Pharmaceutical trade within the EU-27 is dominated by the finished pharmaceutical products (FPP) segment, which accounts for nearly two-thirds of trade by economic value and almost half by tonnage. Active pharmaceutical ingredients (APIs) form the second most traded segment, with a weight comparable to that of finished medicines.

Vaccines are the third category, although their trade reveals a significant discrepancy between economic and logistical analysis: they represent over 9% of trade value in euros but less than 1% of the tonnage transported. Semi-finished products (SFP) and antibiotics follow in importance, reflecting the diverse nature of pharmaceutical production and distribution within the EU.



FPP (Finished Pharmaceutical Products)

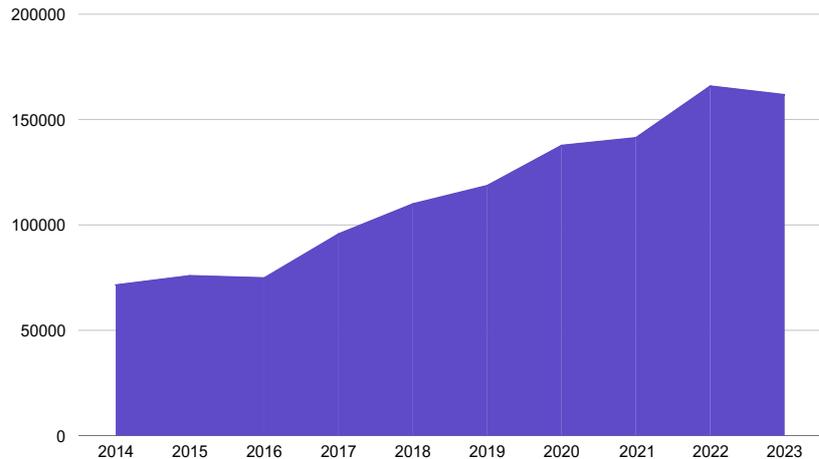
161.63 billion euros

Weight: 1,670,690.42

tonnes

What are they? Finished medicines ready for consumption or distribution.

Examples: Paracetamol tablets, ibuprofen capsules, cough syrup.



Data in millions of euros. Source: Own compilation based on data from the European Commission

Finished pharmaceutical products (FPPs) account for 64% of the sector's trade flows, demonstrating stable growth over the past decade. This trend reinforces the position of the EU-27 as a key supplier of high-quality finished products, essential to the healthcare systems of each member state.

API (Active Pharmaceutical Ingredients)

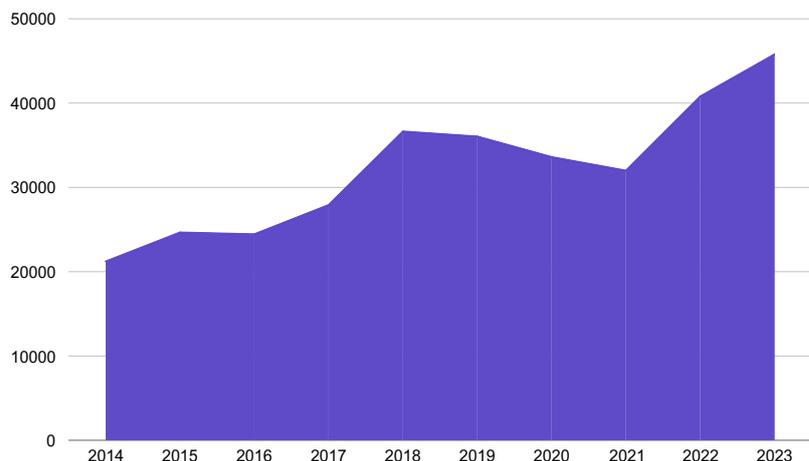
45.78 billion euros

Weight: 1,559,742.73

tonnes

What are they? Active ingredients that provide the therapeutic effect of medicines.

Examples: Amoxicillin as a base for antibiotics, metformin for diabetes, ibuprofen as an anti-inflammatory.



Data in millions of euros. Source: Own compilation based on data from the European Commission

APIs account for 18% of intra-European pharmaceutical exports, highlighting the EU's role as a supplier of essential components for the manufacture of medicines in other member countries. This self-sufficiency reflects the European industry's central position in the production of critical materials, enabling greater independence from external sources for pharmaceutical manufacturing.

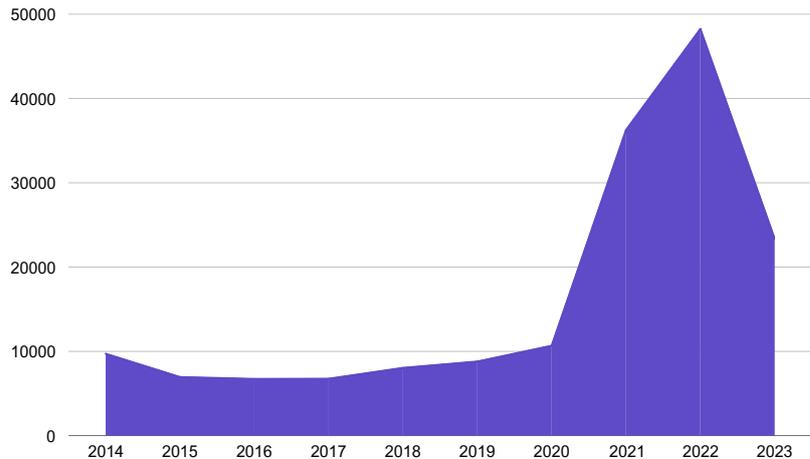
Vaccines

23.35 billion euros

Weight: 22,116.89 tonnes

What are they? Biological preparations designed to prevent specific diseases.

Examples: COVID-19 vaccine, flu vaccine, tetanus vaccine.



Data in millions of euros. Source: Own compilation based on data from the European Commission

Vaccines represent 9% of pharmaceutical trade flows in the EU, with a value of 23.35 billion euros in 2023. This figure is less than half of the 48.24 billion euros recorded the previous year, driven by record coronavirus vaccine doses, but it remains a strategic pillar of high economic value for the pharmaceutical industry.

SFP (Semi-finished products)

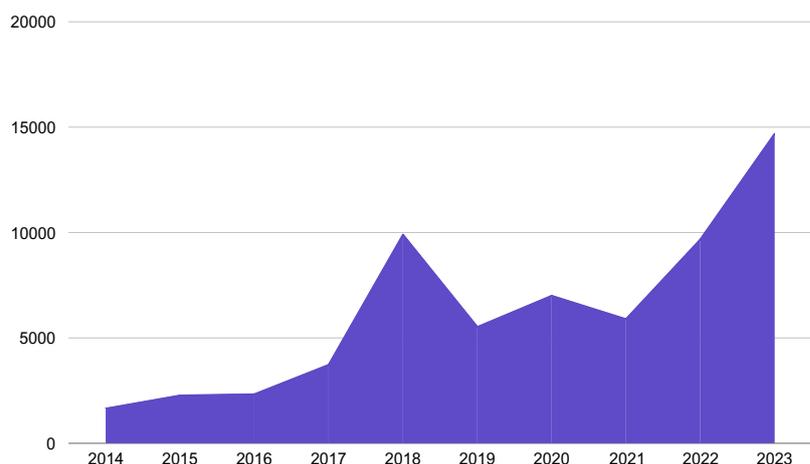
414.68 billion euros

Weight: 43,981.57 tonnes

What are they?

Intermediate products containing APIs and excipients, but requiring final processing.

Examples: Powder blends for tablets, bulk liquids for syrups.



Data in millions of euros. Source: Own compilation based on data from the European Commission

Semi-finished products (SFPs) account for 6% of pharmaceutical trade flows in the EU-27, with a value of 14.68 billion euros in 2023. This segment has experienced the strongest growth in recent years and is crucial for ensuring that production facilities across the EU operate efficiently and maintain a consistent supply.



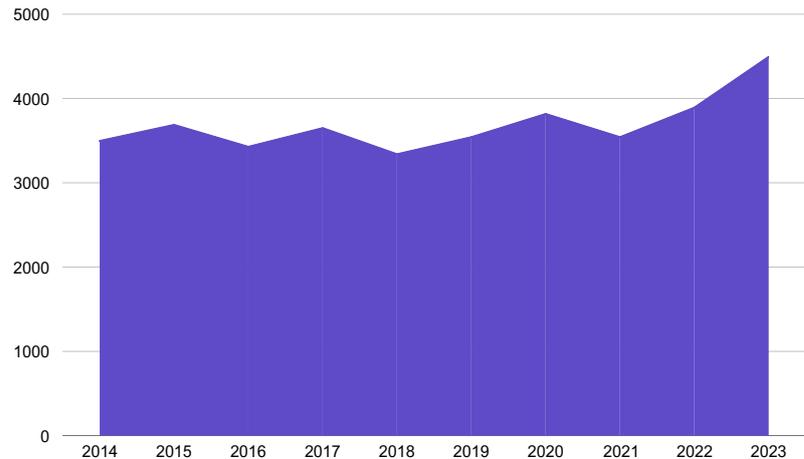
Antibiotics FPPs

4.49 billion euros

Weight: 67,667.63 tonnes

What are they? Finished medicines with ready-to-use antibiotics.

Examples: Amoxicillin capsules, Ceftriaxone injection, Erythromycin syrup.



Data in millions of euros. Source: Own compilation based on data from the European Commission



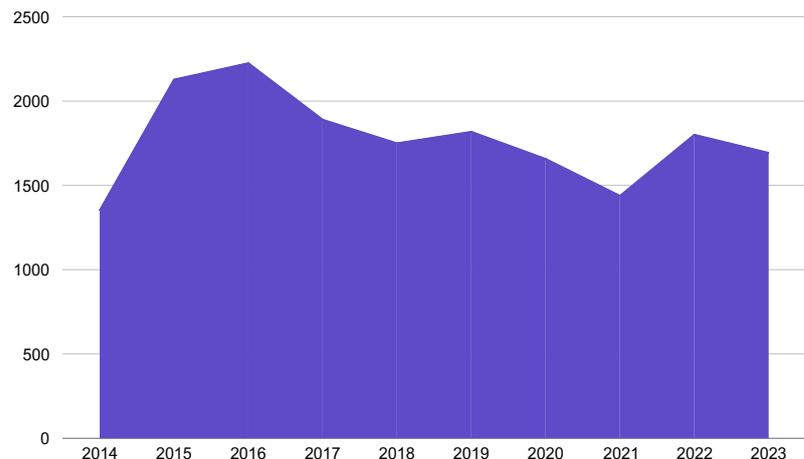
Antibiotics APIs

1.69 billion euros

Weight: 18,097.75 tonnes

What are they? Specific active ingredients to manufacture antibiotics.

Examples: Penicillin G as a base for antibiotics, tetracycline, erythromycin in its pure form.



Data in millions of euros. Source: Own compilation based on data from the European Commission

Antibiotics FPPs and APIs are worth a combined 6.19 billion euros in 2023, representing 2% of the pharma industry's total intra-European exports. Strong demand for antibiotics makes this category a significant part of European pharmaceutical trade, particularly for ready-to-use medicines.

How much is a kilo of pharma products worth?

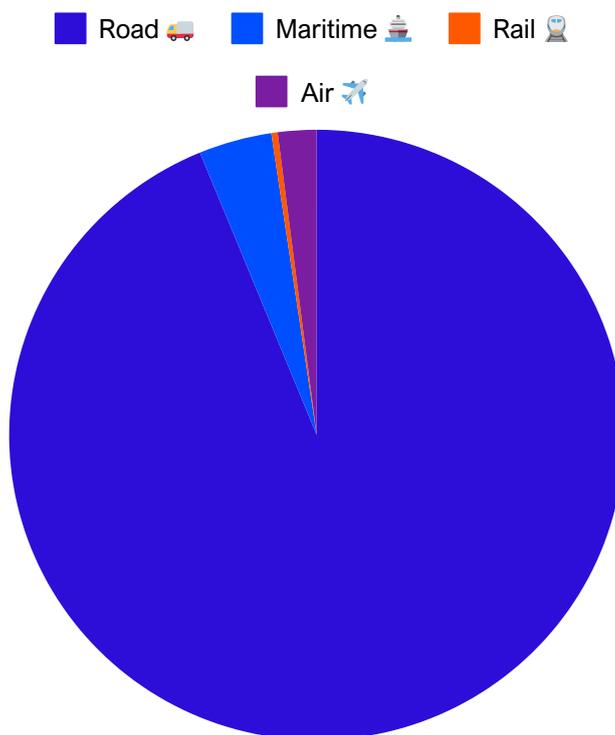
One of the great peculiarities of the pharma industry is the high economic value of its products, which far exceeds the value of most consumer goods and raw materials. In the EU-27, the average value of a kilogram of pharmaceuticals is 74.44 euros, significantly higher than the 10 euros per kilogram for a car or the 1 euro per kilogram for steel. That said, there are significant differences between segments within the pharma industry:

1.  **Vaccines**: 1,055.59 €/kg
2.  **Semi-finished products (SFP)**: 333.80 €/kg
3.  **Finished pharmaceutical products (FPP)**: 96.75 €/kg
4.  **Antibiotics APIs**: 93.51 €/kg
5.  **Antibiotics FPPs**: 66.40 €/kg
6.  **Active pharmaceutical ingredients (API)**: 29.35 €/kg

The high economic value of pharmaceuticals has significant logistical implications and is the main argument for specialized transport in this industry. In particular, product safety and control are critical to protecting economic value and ensuring product integrity.



How are pharma products transported?



Data in % for 2023. Source: Own compilation based on data from the European Commission and the United Nations. Data for Belgium, Estonia, Finland, Italy, Lithuania and Poland include pharmaceuticals and paracheicals. Data are not available for Austria, Croatia, Denmark, France, Hungary, Ireland and the Netherlands.

More than 93% of pharmaceutical products in the EU-27 are transported by road. Maritime transport lags far behind, with a share of less than 4%, followed by air and rail, with 2% and less than 1%, respectively.

To understand this dominance of road transport in the pharmaceutical industry's logistics flows, it is important to examine the arguments that align the characteristics of road transport with the specific needs of the industry, both operationally and strategically.

Flexibility and capillarity

Road transport can reach any destination, from major urban centres to remote locations, and offers a wide variety of fleets to accommodate the volumes required for each shipment. This adaptability is crucial in the pharmaceutical sector, where deliveries must be made directly to laboratories, hospitals, pharmacies, or research centres, with flows varying significantly.

In addition, road transport allows the planning of customized routes tailored to the specific needs of each customer. This is a significant advantage when organizing, for example,

urgent deliveries or transporting particularly sensitive products that require minimal transit times.

Perfect distances for road transport

The average distance of the main pharmaceutical trade flows within the EU-27 ranges between 500 and 1,000 kilometres. Road transport is particularly competitive for these medium distances, where air, rail, or maritime transport struggle to offer comparable time or cost advantages.

Geographical concentration of flows

High traffic densities in certain regions of the continent facilitate freight consolidation, presenting an opportunity to reduce unit transport costs. Operators can fill trucks more regularly, avoiding under-loaded or empty vehicles, which improves efficiency and reduces the cost per kilogram transported.



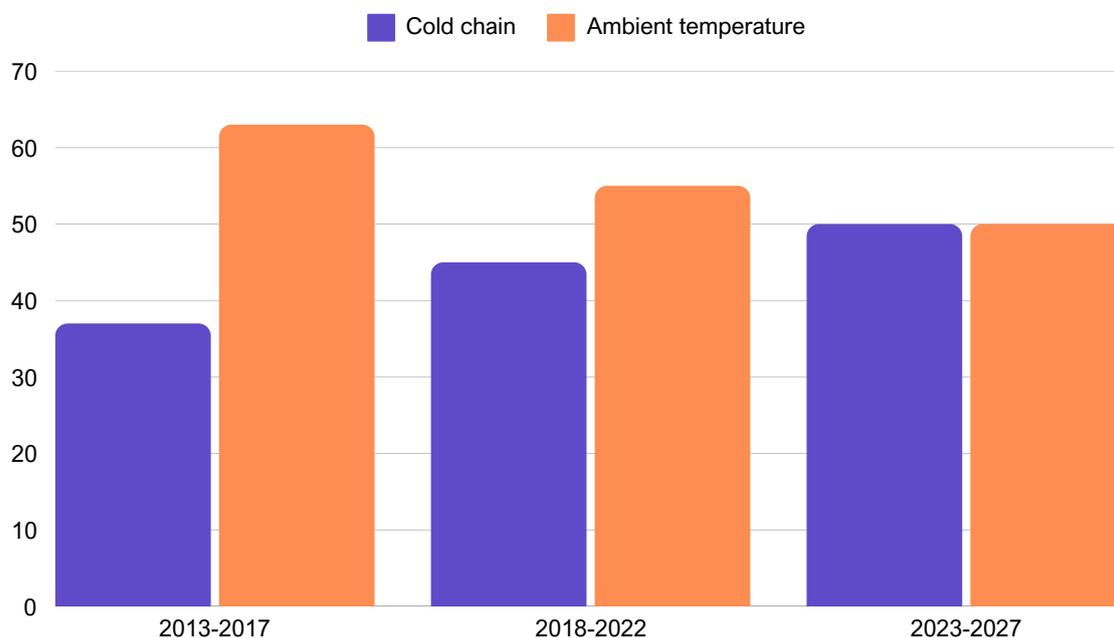
Integration into multimodal chains

Road transport is also integrated into international supply chains that begin or end outside the EU and continue their journey by air and sea. In this way, trucks or vans serve as critical links, ensuring transshipment between modes of transport or facilitating the final delivery of the product.

Total control over cargo conditions

The pharmaceutical industry requires strict temperature and humidity conditions to ensure the stability and efficacy of its products. Road transport has a growing fleet of refrigerated vehicles, designed to maintain tight control over specific temperature ranges (e.g., 2°C to 8°C or freezing conditions). These vehicles are equipped with real-time sensors, alarm systems, and traceability tools to promptly detect and address any deviations during transport.

Refrigerated transport, increasingly decisive for the pharma industry



Data in %. Source: IQVIA

The growing development of biological medicines, vaccines, and advanced therapies will require an expanded cold chain throughout the logistics process. According to data from consultancy IQVIA, 50% of new medicines entering the market today require cold storage, compared to 37% between 2013 and 2017 and 45% between 2018 and 2022.

This demand presents a significant challenge to maintaining product integrity, especially in the last mile, where medicines are most vulnerable to temperature fluctuations. According to the World Health Organization, up to 50% of vaccines are lost due to cold chain failures.

To address these challenges, refrigerated transport will continue to be a key area of innovation for logistics operators specializing in the pharmaceutical industry. In particular, there will be a focus on ultra-low temperature logistics required for advanced therapy medicinal products (ATMPs), such as CAR-T cells. This emerging segment is projected to reach a volume of 20 billion dollars by 2026 and requires temperatures as low as -120°C , necessitating adaptations to the infrastructure and transport fleet dedicated to their storage and distribution.

Full-load and groupage transport: specific solutions for the pharma industry

Road transport offers two main models to meet the needs of customers in this sector: full-load transport and groupage. The combination of these two services enables the pharmaceutical industry to operate with greater flexibility, optimize transit times, and reduce costs, handling everything from large batches destined for hubs or central warehouses to small deliveries to specific locations.

Full-load

This is the solution for transporting large volumes of pharmaceutical products that require specific and unique conditions throughout the entire journey.

What are the benefits to the industry?

- Fast delivery times: minimizes intermediate stops, enabling direct deliveries to hospitals, warehouses or logistics centres.
- Customized conditions: ensures strict control of critical variables such as temperature and humidity, essential for preserving the efficacy of sensitive medicines like vaccines or advanced therapies.
- Exclusivity in the vehicle: eliminates the risk of cross-contamination by avoiding the mixing of goods with other shipments.

This model is particularly useful in high-priority situations, such as the distribution of vaccines during mass campaigns or the urgent transport of essential medicines in health emergencies.



Groupage

Groupage is the most commonly used option for smaller shipments, as it allows multiple companies to share space on the same vehicle, optimizing resources and reducing costs. In this way, pharmacies, laboratories, or research centres use this service when cargo volumes do not justify the exclusive use of a truck.

What are the benefits to the industry?

- Cost optimization: by consolidating shipments from multiple customers, the cost per kilogram transported is reduced.
- Lower environmental impact: the shared use of vehicles reduces the carbon footprint, resulting in environmental savings.
- Accessibility for smaller companies: it allows smaller laboratories and manufacturers to access advanced logistics solutions without the need to hire a complete vehicle, facilitating their participation in complex supply chains.

Groupage is a key solution to meet the needs of an industry where logistics costs have a significant impact on the final price of the product. The International Federation of Pharmaceutical Manufacturers and Associations (IFPMA) provides a striking statistic: approximately 60% of the final price paid by the patient for essential medicines is attributed to costs incurred from the moment the product leaves the factory. Therefore, every operational improvement, such as optimizing shipments through groupage, represents an opportunity to enhance the competitiveness and accessibility of the industry.



State-level analysis of trade flows in the pharma sector



Production
 16th country in the European production ranking
 Produces **1.45 billion €**

EU trade
 Exports **8.63 billion €**
 Imports **7.22 billion €**

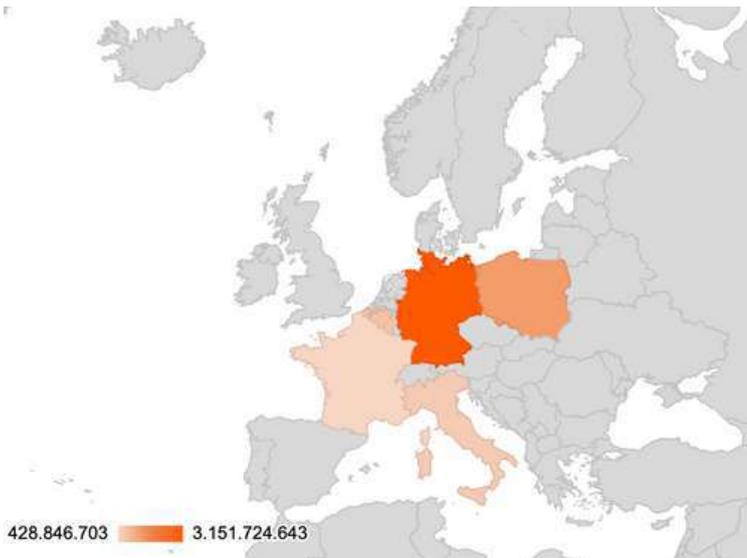
Extra-European trade
 Exports **7.65 billion €**
 Imports **3.22 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?



-  →  Germany: 3.15 billions €, 23,279 t
-  →  Poland: 1.41 billions €, 6,522 t
-  →  Belgium: 768.23 millions €, 2,059 t
-  →  Italy: 609.56 millions €, 6,551 t
-  →  France: 428.85 millions €, 4,198 t

Data in millions of euros, from the European Commission

Production
 2nd country in the European production ranking
 Produces **40.96 billion €**

EU trade
 Exports **33.07 billion €**
 Imports **40.45 billion €**

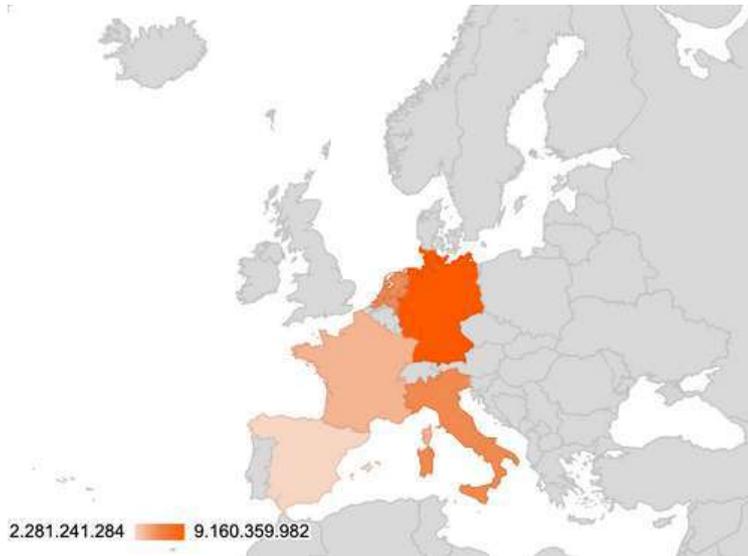
Extra-European trade
 Exports **43.15 billion €**
 Imports **25.25 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

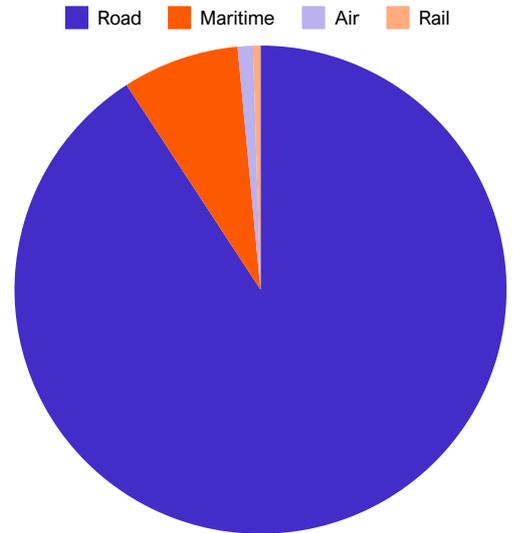
To which countries?



Data in millions of euros, from the European Commission

-  Germany: 9.16 billions €, 42,023 t
-  Italy: 5.53 billions €, 16,853 t
-  The Netherlands: 5.36 billions €, 73,055 t
-  France: 3.66 billions €, 50,233 t
-  Spain: 2.28 billions €, 5,065 t

How is it transported?



Data in %, from the European Commission

-  Road: 90.85 %
-  Maritime: 7.68 %
-  Air: 1 %
-  Rail: 0.49 %

Production
 22nd country in the European production ranking
 Produces **322 million €**

EU trade
 Exports **652.97 million €**
 Imports **1.83 billion €**

Extra-European trade
 Exports **594.56 million €**
 Imports **232.19 million €**

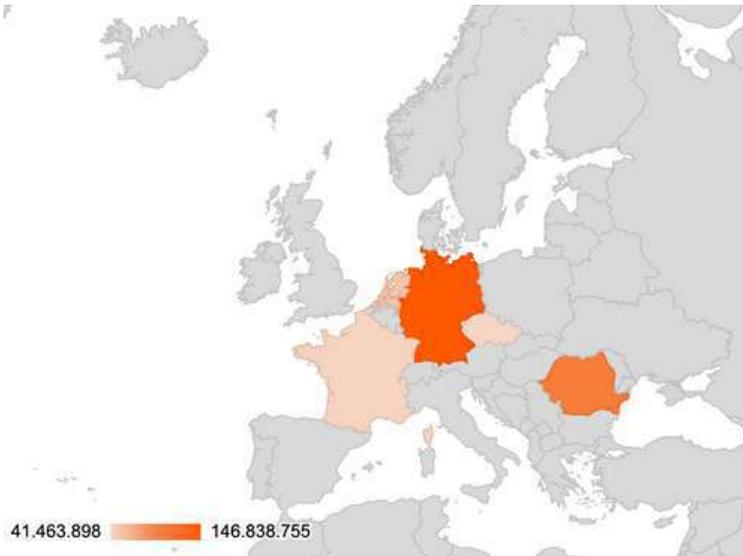
What pharmaceutical products do it export to the EU?



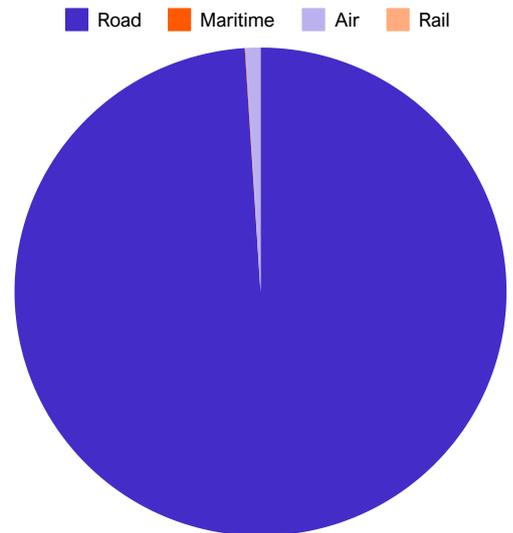
Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?

How is it transported?



Data in millions of euros, from the European Commission



Data in %, from the European Commission

-  Germany: 146.84 millions €, 42.02 t
-  Romania: 105.35 millions €, 1,414 t
-  The Netherlands: 51.98 millions €, 280 t
-  France: 42.67 millions €, 974 t
-  Czech Republic: 41.46 millions €, 1,109 t

-  Road: 98.98 %
-  Maritime: 0.04 %
-  Air: 0.97 %
-  Rail: 0.01 %

Production
 19th country in the European production ranking
 Produces **553 million €**

EU trade
 Exports **537.27 million €**
 Imports **1.55 billion €**

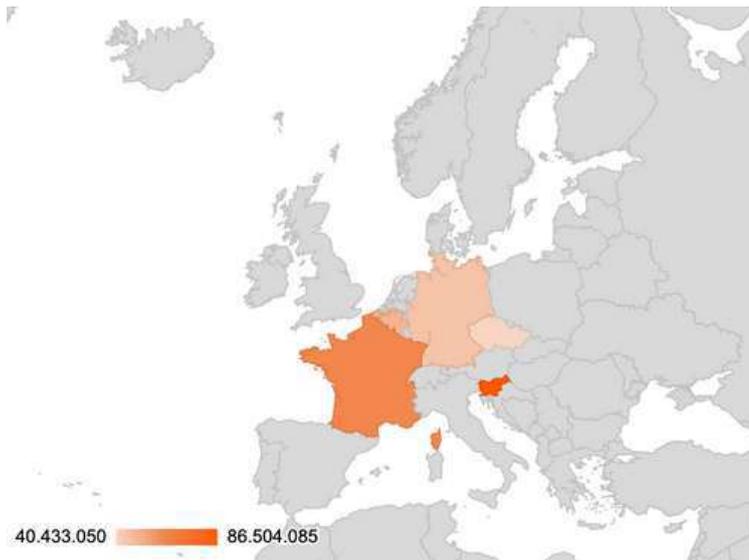
Extra-European trade
 Exports **544.71 million €**
 Imports **166.82 million €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?



-  →  Slovenia: 86.50 millions €, 589 t
-  →  France: 62.79 millions €, 66 t
-  →  Belgium: 49.74 millions €, 108 t
-  →  Germany: 45.60 millions €, 1,005 t
-  →  Czech Republic: 40.43 millions €, 96 t

Data in millions of euros, from the European Commission

Production
 24th country in the European production ranking
 Produces **253 million €**

EU trade
 Exports **241.33 million €**
 Imports **359.42 million €**

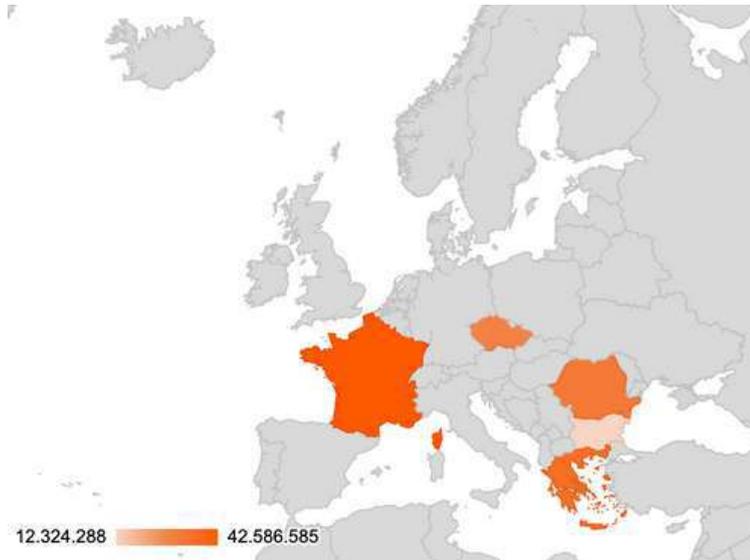
Extra-European trade
 Exports **162.09 million €**
 Imports **88.83 million €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

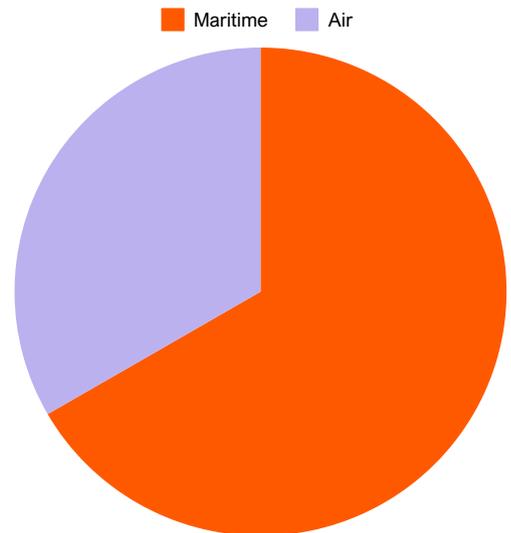
To which countries?



Data in millions of euros, from the European Commission

-  →  France: 42.59 millions €, 463 t
-  →  Greece: 35.12 millions €, 395 t
-  →  Romania: 31.24 millions €, 166 t
-  →  Czech Republic: 28.65 millions €, 162 t
-  →  Bulgaria: 12.32 millions €, 149 t

How is it transported?



Data in %, from the European Commission

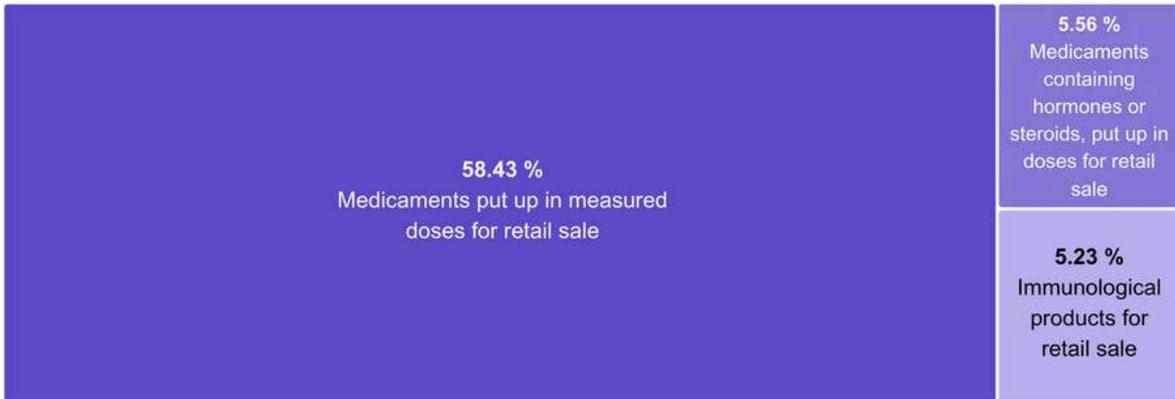
-  Road: -
-  Maritime: 66.64 %
-  Air: 33.36 %
-  Rail: -

Production
 17th country in the European production ranking
 Produces **800 million €**

EU trade
 Exports **3.31 billion €**
 Imports **6.27 billion €**

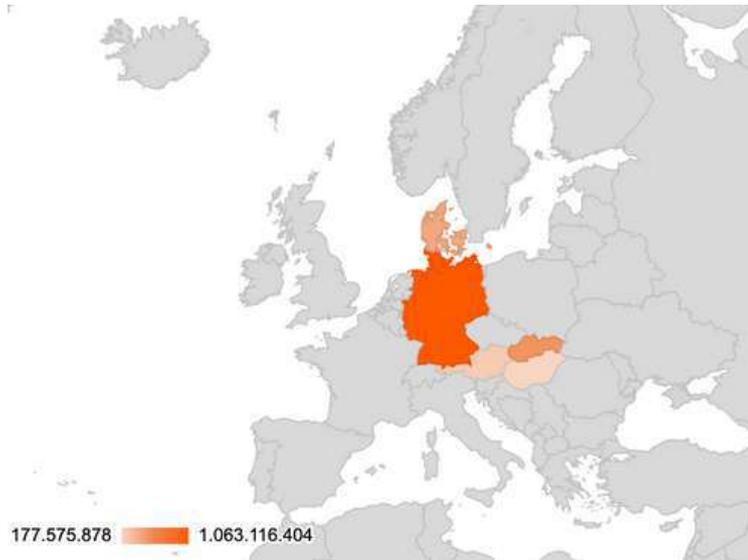
Extra-European trade
 Exports **582.54 million €**
 Imports **627.23 million €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

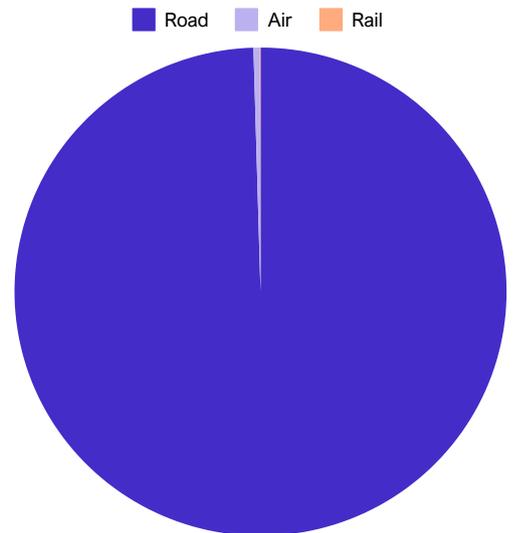
To which countries?



Data in millions of euros, from the European Commission

-  →  Germany: 1.06 billions €, 11,659 t
-  →  Slovakia: 533.25 millions €, 5,217 t
-  →  Denmark: 422.13 millions €, 836 t
-  →  Austria: 234.79 millions €, 3,040 t
-  →  Hungary: 177.58 millions €, 1,973 t

How is it transported?



Data in %, from the European Commission

-  Road: 99.53 %
-  Maritime: -
-  Air: 0.42 %
-  Rail: 0.04 %

Production
 6th country in the European production ranking
 Produces **21.50 billion €**

EU trade
 Exports **6.84 billion €**
 Imports **3.89 billion €**

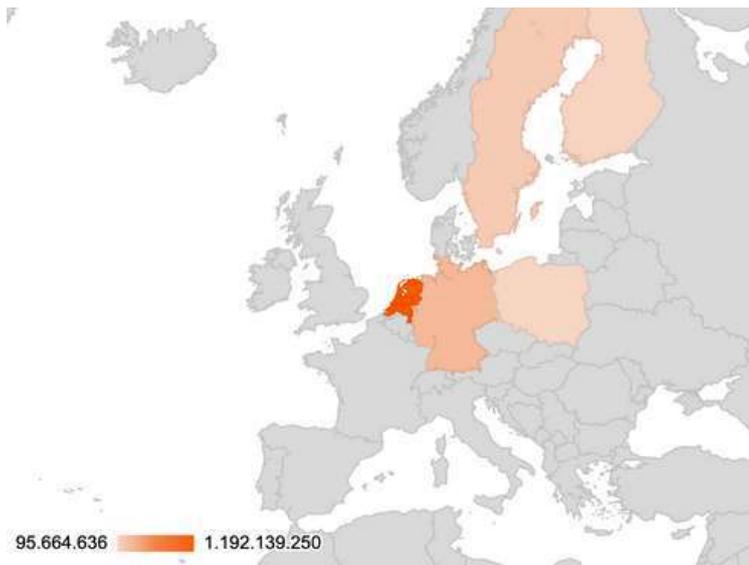
Extra-European trade
 Exports **12.63 billion €**
 Imports **1.16 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?

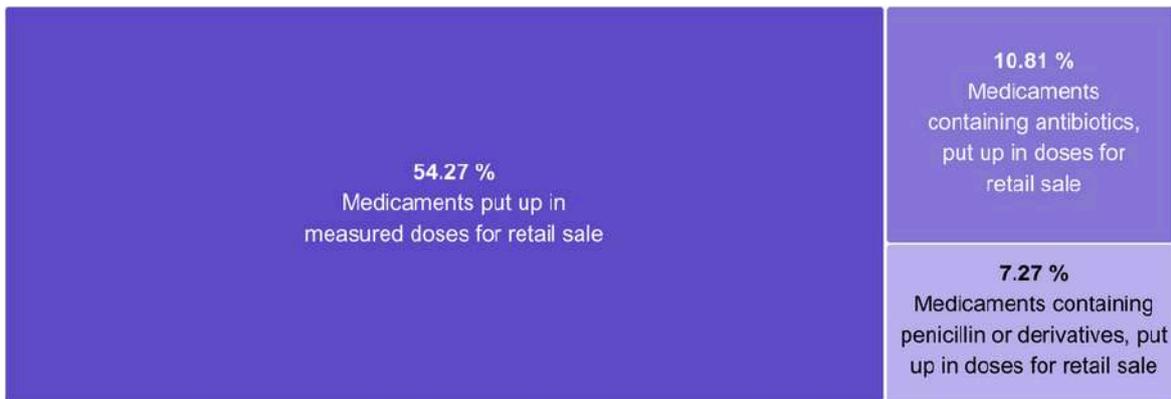


-  →  The Netherlands: 1.19 billions €, 2,429 t
-  →  Germany: 286.31 millions €, 11,191 t
-  →  Sweden: 168.78 millions €, 900 t
-  →  Finland: 108.29 millions €, 251 t
-  →  Poland: 95.66 millions €, 1,269 t

Data in millions of euros, from the European Commission

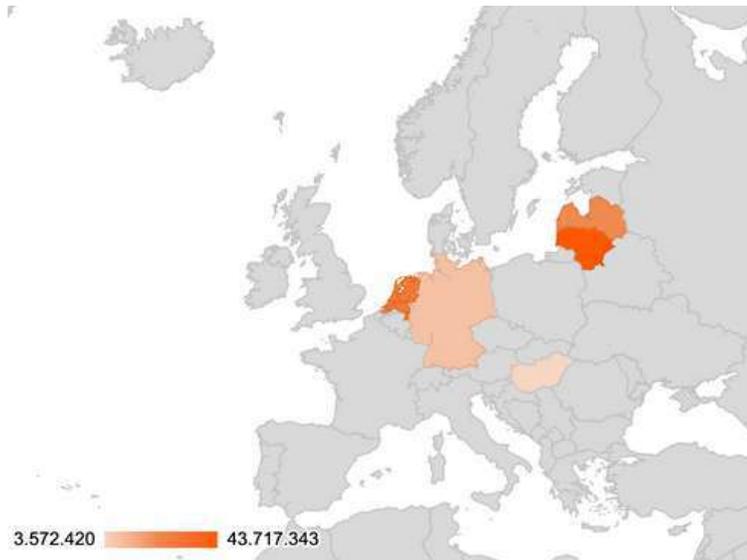


What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

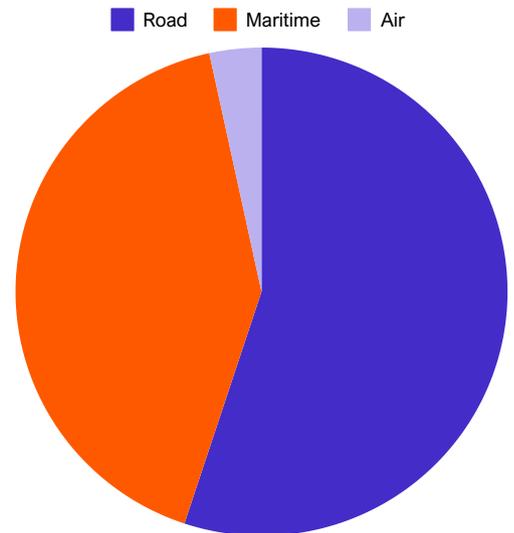
To which countries?



Data in millions of euros, from the European Commission

-  Lithuania: 43.72 millions €, 376 t
-  The Netherlands: 28.41 millions €, 2,028 t
-  Latvia: 22.44 millions €, 557 t
-  Germany: 8.57 millions €, 32 t
-  Hungary: 3.57 millions €, 2 t

How is it transported?



Data in %, from the European Commission

-  Road: 55.08 %
-  Maritime: 41.52 %
-  Air: 3.41 %
-  Rail: -

Production
 14th country in the European production ranking
 Produces **1.96 billion €**

EU trade
 Exports **619.04 million €**
 Imports **2.16 billion €**

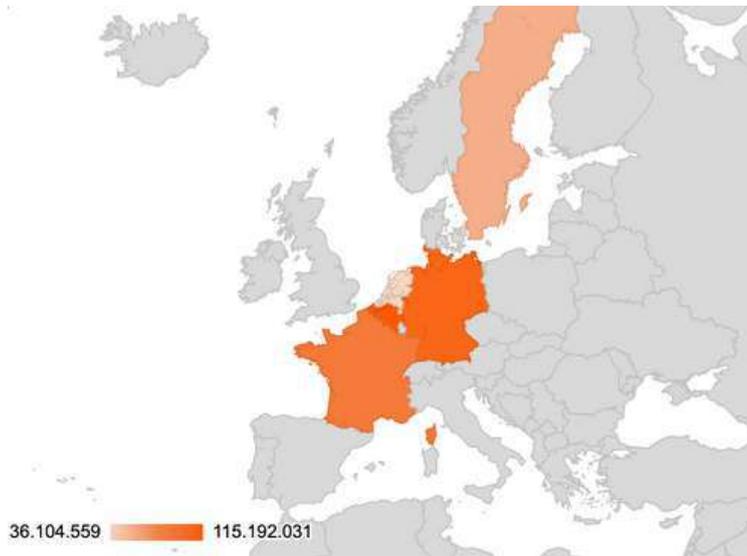
Extra-European trade
 Exports **1.22 billion €**
 Imports **220.98 million €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

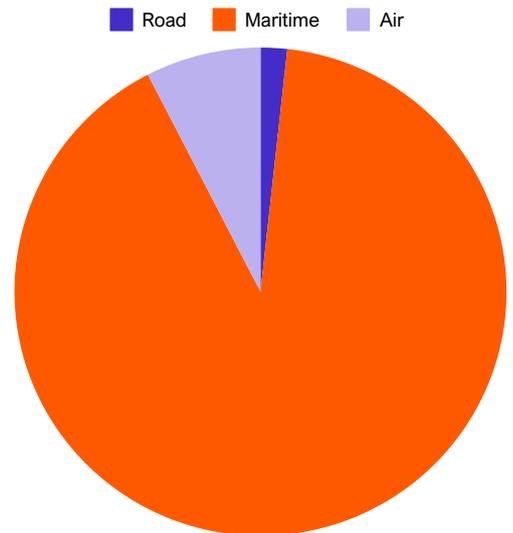
To which countries?



Data in millions of euros, from the European Commission

- +** → **🇧🇪** Belgium: 115.19 millions €, 2,863 t
- +** → **🇩🇪** Germany: 102.69 millions €, 90 t
- +** → **🇫🇷** France: 85.39 millions €, 588 t
- +** → **🇸🇪** Sweden: 54.59 millions €, 280 t
- +** → **🇳🇱** The Netherlands: 36.10 millions €, 159 t

How is it transported?



Data in %, from the European Commission

- 🚚** Road: 1.74 %
- 🚢** Maritime: 90.69 %
- ✈️** Air: 7.57 %
- 🚊** Rail: -

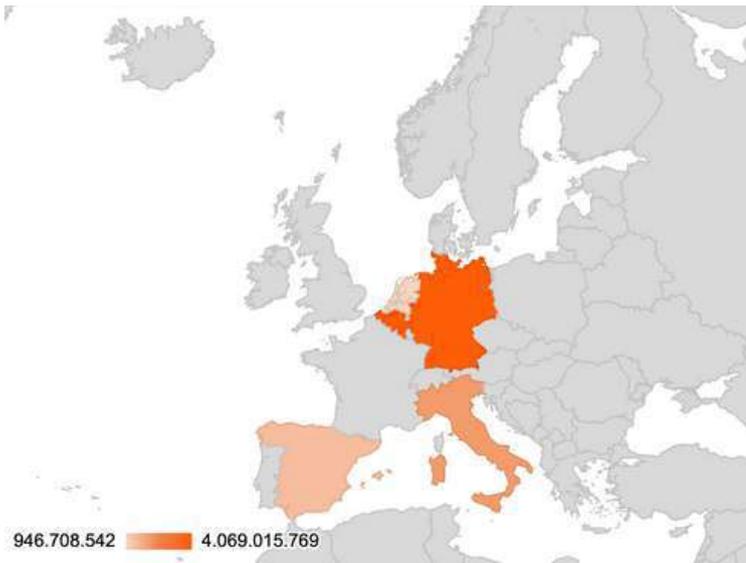


What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?



- Belgium: 4.07 billions €, 31,872 t
- Germany: 3.90 billions €, 106,821 t
- Italy: 2.06 billions €, 26,742 t
- Spain: 1.43 billions €, 19,069 t
- The Netherlands: 946.71 millions €, 19,170 t

Data in millions of euros, from the European Commission

Production
 3rd country in the European production ranking
 Produces **37.41 billion €**

EU trade
 Exports **50.64 billion €**
 Imports **51.21 billion €**

Extra-European trade
 Exports **61.06 billion €**
 Imports **17.13 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

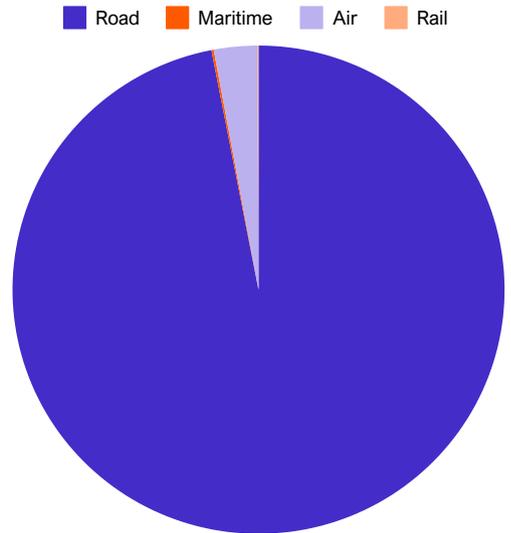
To which countries?



Data in millions of euros, from the European Commission

-  The Netherlands: 10.22 billions €, 43,162 t
-  Italy: 7.71 billions €, 44,224 t
-  Belgium: 6.18 billions €, 40,356 t
-  France: 5.83 billions €, 100.201 t
-  Spain: 3.45 billions €, 29,480 t

How is it transported?



Data in %, from the European Commission

-  Road: 96.94 %
-  Maritime: 0.15 %
-  Air: 2.85 %
-  Rail: 0.07 %

Production
 15th country in the European production ranking
 Produces **1.88 billion €**

EU trade
 Exports **2.02 billion €**
 Imports **3.69 billion €**

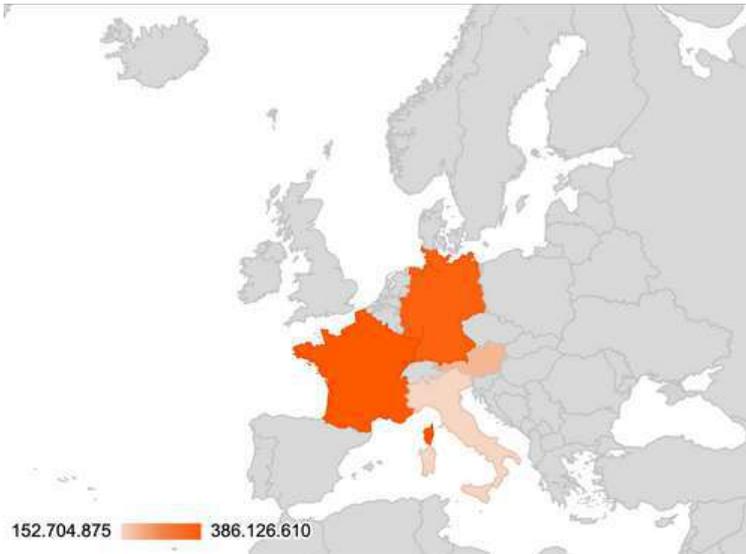
Extra-European trade
 Exports **788.63 million €**
 Imports **403.04 million €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

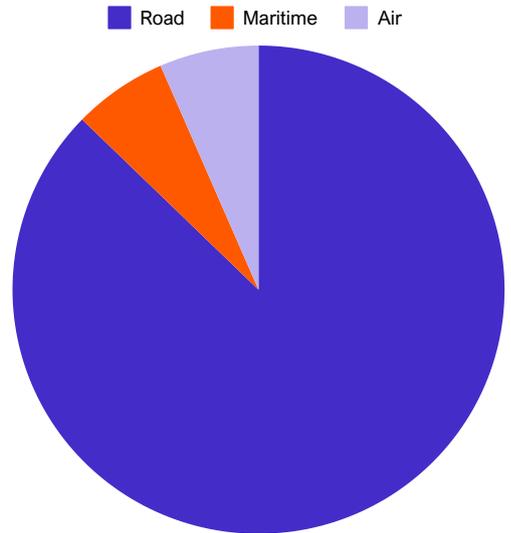
To which countries?



Data in millions of euros, from the European Commission

-  France: 386.13 millions €, 2,725 t
-  Germany: 362.31 millions €, 10,506 t
-  Cyprus: 203.98 millions €, 2,916 t
-  Austria: 197.68 millions €, 380 t
-  Italy: 152.70 millions €, 1,276 t

How is it transported?



Data in %, from the European Commission

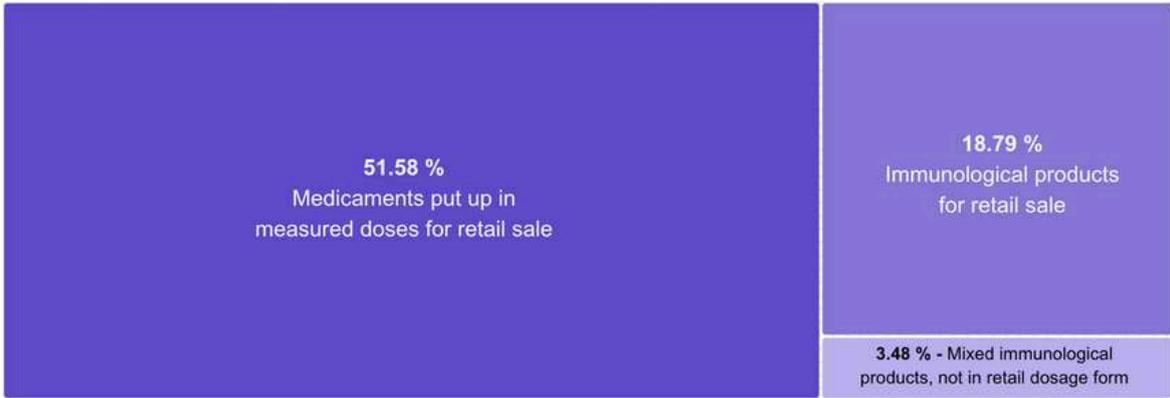
-  Road: 87.29 %
-  Maritime: 6.21 %
-  Air: 6.52 %
-  Rail: -

Production
 11th country in the European production ranking
 Produces **3.14 billion €**

EU trade
 Exports **6.24 billion €**
 Imports **4.93 billion €**

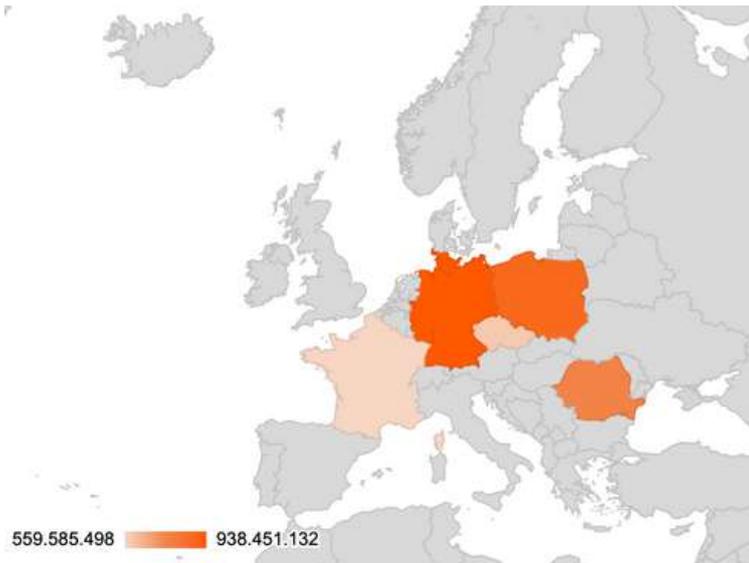
Extra-European trade
 Exports **2.27 billion €**
 Imports **1.48 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?



-  →  Germany: 938.45 millions €, 5,597 t
-  →  Poland: 864.52 millions €, 4,216 t
-  →  Romania: 759.69 millions €, 3,747 t
-  →  Czech Republic: 588.76 millions €, 2,171 t
-  →  France: 559.59 millions €, 8,437 t

Data in millions of euros, from the European Commission

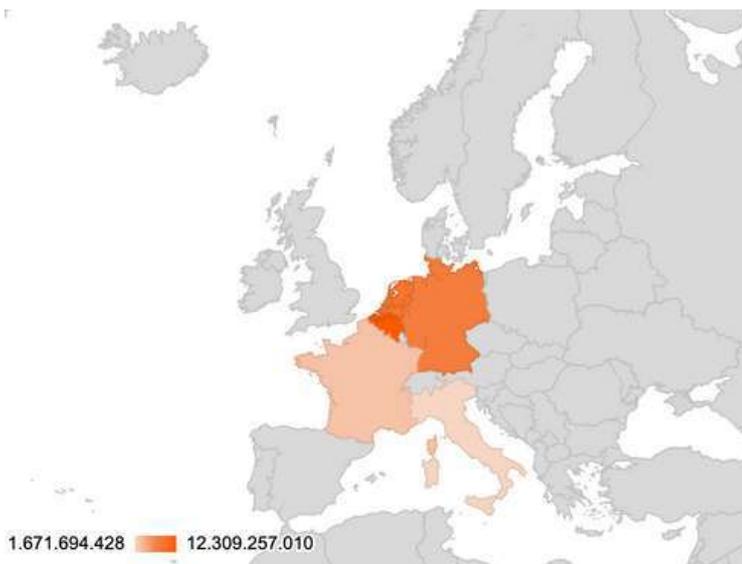


What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?



-  →  Belgium: 12.31 billions €, 52,259 t
-  →  The Netherlands: 8.75 billions €, 12,300 t
-  →  Germany: 7.88 billions €, 5,369 t
-  →  France: 2.90 billions €, 13,837 t
-  →  Italy: 1.67 billions €, 13,651 t

Data in millions of euros, from the European Commission

Production
 1st country in the European production ranking
 Produces **49 billion €**

EU trade
 Exports **21.84 billion €**
 Imports **23.46 billion €**

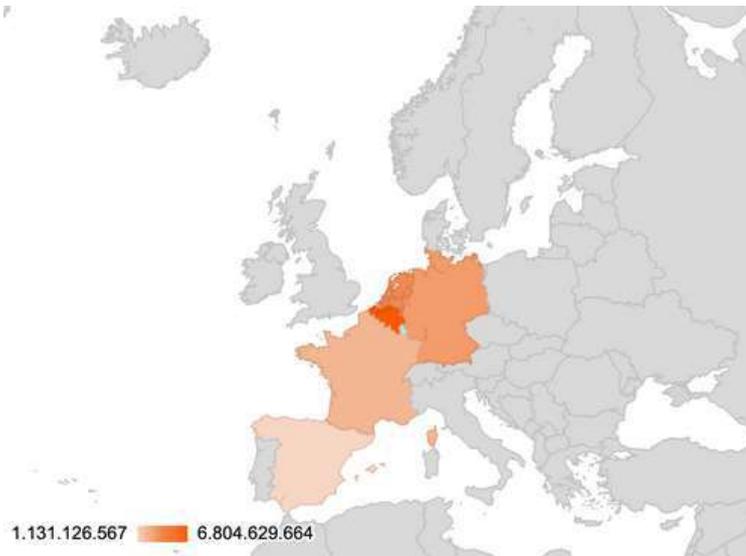
Extra-European trade
 Exports **24.70 billion €**
 Imports **6.81 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

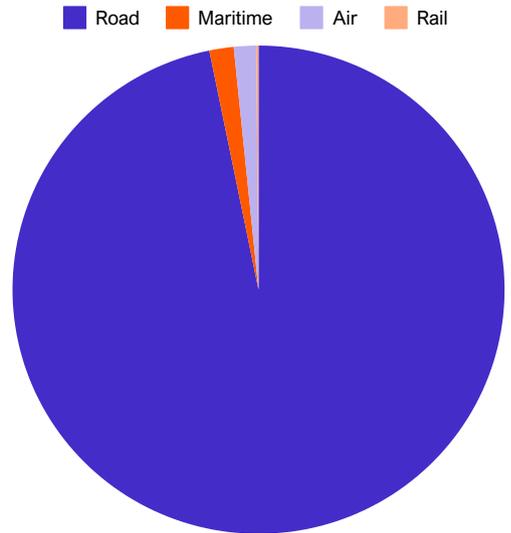
To which countries?



Data in millions of euros, from the European Commission

- 🇮🇹 → 🇧🇪 Belgium: 6.80 billions €, 30,440 t
- 🇮🇹 → 🇳🇱 The Netherlands: 3.74 billions €, 9,984 t
- 🇮🇹 → 🇩🇪 Germany: 3.16 billions €, 31,204 t
- 🇮🇹 → 🇫🇷 France: 2.26 billions €, 55,046 t
- 🇮🇹 → 🇪🇸 Spain: 1.13 billions €, 30,337 t

How is it transported?



Data in %, from the European Commission

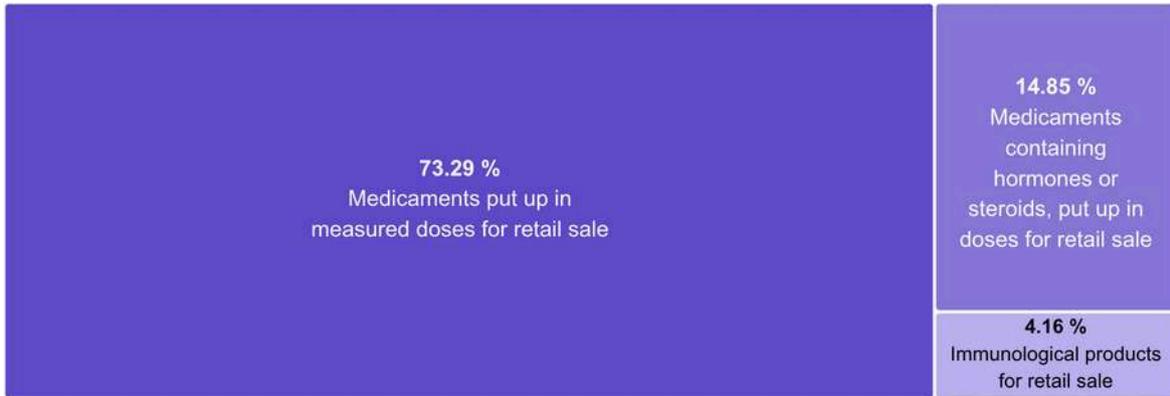
- 🚚 Road: 96.21 %
- 🚢 Maritime: 1.59 %
- ✈️ Air: 1.46 %
- 🚊 Rail: 0.14 %

Production
 20th country in the European production ranking
 Produces **330 million €**

EU trade
 Exports **333.65 million €**
 Imports **869.63 million €**

Extra-European trade
 Exports **364.96 million €**
 Imports **110.30 million €**

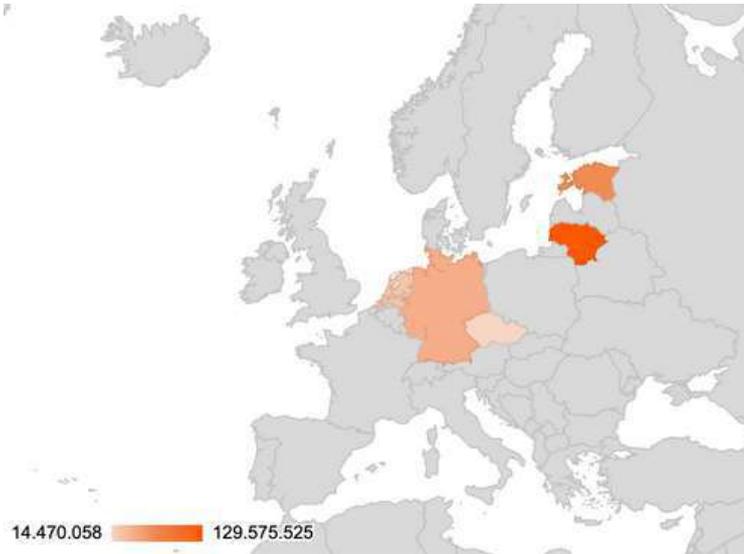
What pharmaceutical products do it export to the EU?



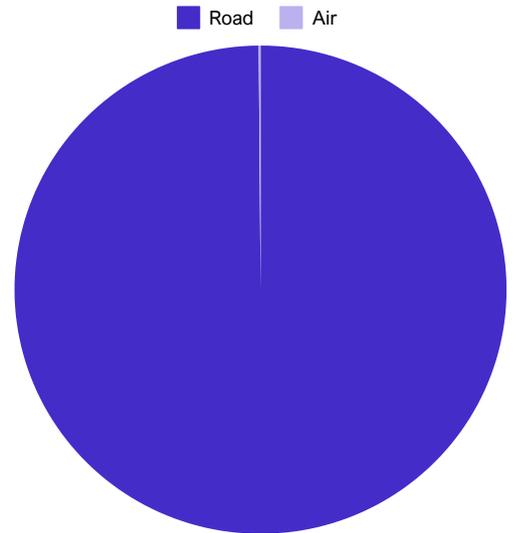
Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?

How is it transported?



Data in millions of euros, from the European Commission



Data in %, from the European Commission

- 🇱🇹 → Lithuania: 129.58 millions €, 654 t
- 🇪🇪 → Estonia: 67.26 millions €, 481 t
- 🇩🇪 → Germany: 41.96 millions €, 161 t
- 🇳🇱 → The Netherlands: 25.53 millions €, 147 t
- 🇨🇪 → Czech Republic: 14.47 millions €, 52 t

- 🚚 Road: 99.88 %
- 🚢 Maritime: -
- ✈️ Air: 0.12 %
- 🚊 Rail: -

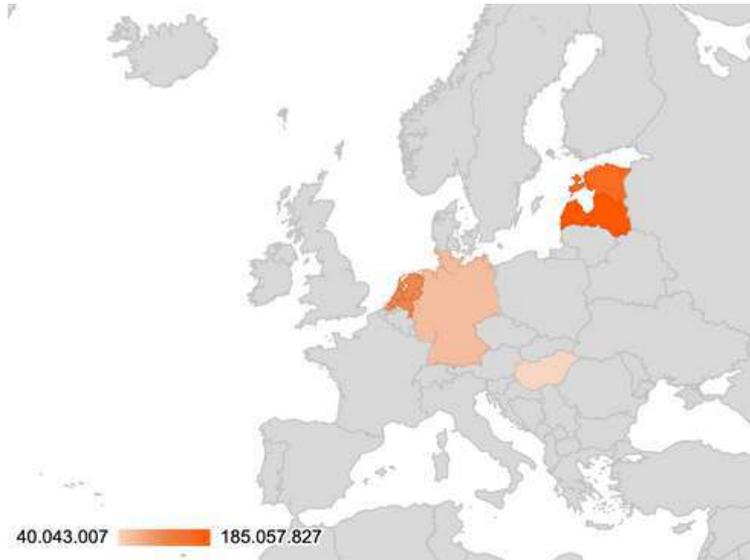


What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

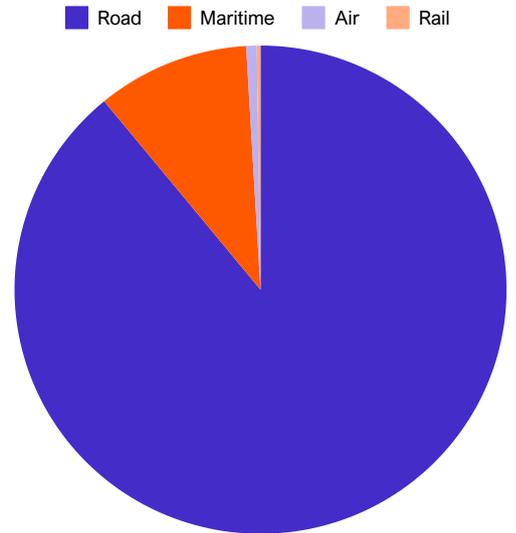
To which countries?



Data in millions of euros, from the European Commission

-  →  Latvia: 185.06 millions €, 1,567 t
-  →  Estonia: 153.60 millions €, 977 t
-  →  The Netherlands: 108 millions €, 1,070 t
-  →  Germany: 61.37 millions €, 98 t
-  →  Hungary: 40.04 millions €, 23 t

How is it transported?



Data in %, from the European Commission

-  Road: 89 %
-  Maritime: 10.03 %
-  Air: 0.69 %
-  Rail: 0.24 %



What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

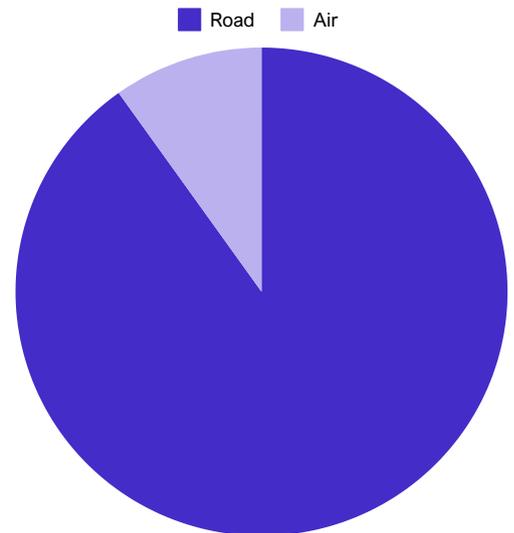
To which countries?



Data in millions of euros, from the European Commission

-  →  Belgium: 102.11 millions €, 1,133 t
-  →  Italy: 15.63 millions €, 34 t
-  →  Spain: 14.68 millions €, 30 t
-  →  Germany: 5.38 millions €, 134 t
-  →  Portugal: 4.47 millions €, 12 t

How is it transported?



Data in %, from the European Commission

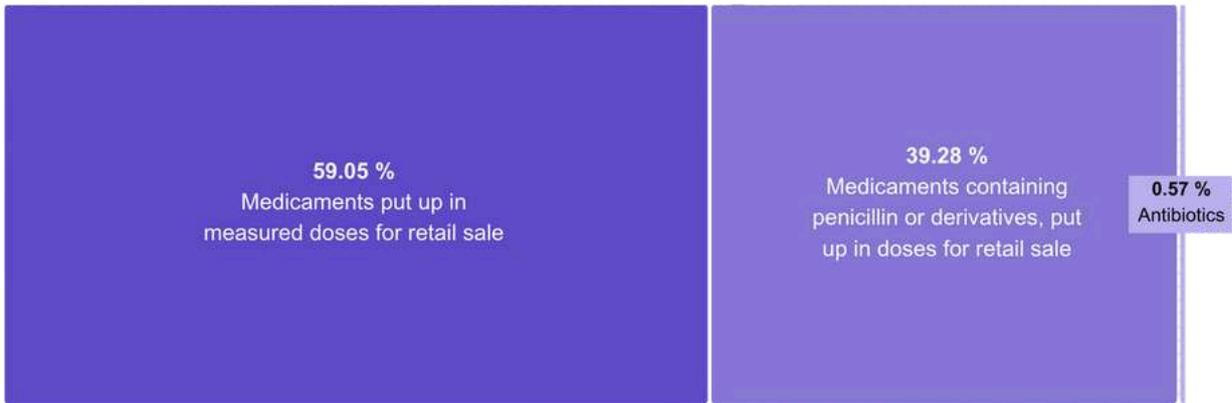
-  Road: 90.12 %
-  Maritime: -
-  Air: 9.86 %
-  Rail: -

Production
 23rd country in the European production ranking
 Produces **330 million €**

EU trade
 Exports **284.51 million €**
 Imports **149.85 million €**

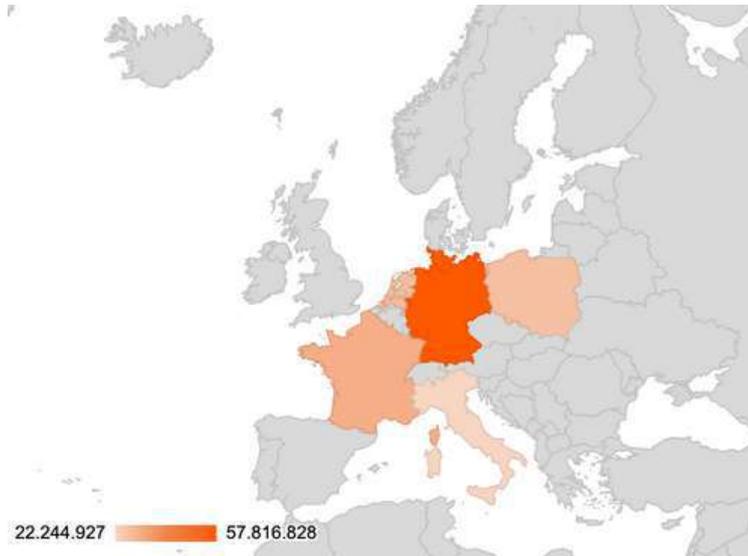
Extra-European trade
 Exports **90.58 million €**
 Imports **223.87 million €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

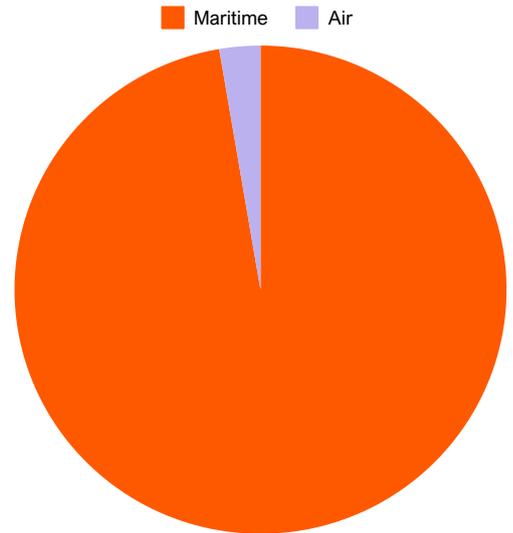
To which countries?



Data in millions of euros, from the European Commission

- 🇩🇪 → Germany: 129.58 millions €, 1,898 t
- 🇫🇷 → France: 67.26 millions €, 765 t
- 🇳🇱 → The Netherlands: 41.96 millions €, 1,117 t
- 🇵🇱 → Poland: 25.53 millions €, 658 t
- 🇮🇹 → Italy: 14.47 millions €, 680 t

How is it transported?



Data in %, from the European Commission

- 🚚 Road: -
- 🚢 Maritime: 97.31
- ✈️ Air: 2.69 %
- 🚊 Rail: -

Production
 10th country in the European production ranking
 Produces **6.18 billion €**

EU trade
 Exports **29.69 billion €**
 Imports **28.11 billion €**

Extra-European trade
 Exports **23.44 billion €**
 Imports **14.59 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?



-  →  Germany: 9.60 billions €, 56,336 t
-  →  France: 4.71 billions €, 22,071 t
-  →  Italy: 2.78 billions €, 9,626 t
-  →  Belgium: 2.65 billions €, 115,650 t
-  →  Spain: 2.11 billions €, 7,953 t

Data in millions of euros, from the European Commission

Production
 12th country in the European production ranking
 Produces **2.90 billion €**

EU trade
 Exports **4.18 billion €**
 Imports **9.46 billion €**

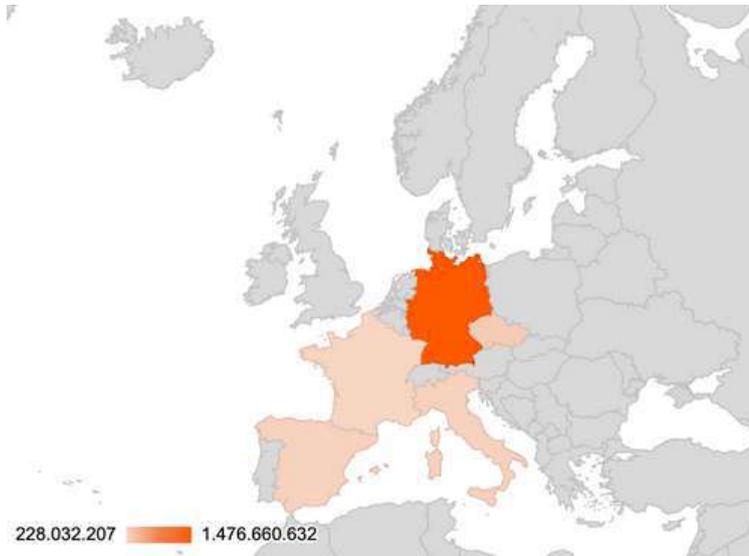
Extra-European trade
 Exports **1.67 billion €**
 Imports **1.01 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

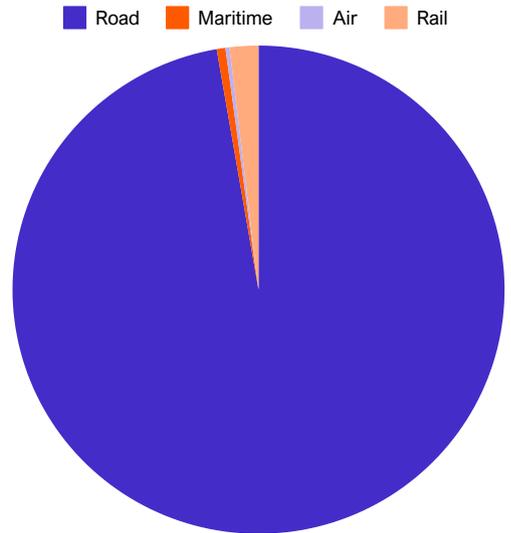
To which countries?



Data in millions of euros, from the European Commission

-  Germany: 1.48 billions €, 16,106 t
-  Czech Republic: 303.28 millions €, 6,267 t
-  Italy: 258.66 millions €, 2,751 t
-  Spain: 255.97 millions €, 1,913 t
-  France: 228.03 millions €, 6,872 t

How is it transported?



Data in %, from the European Commission

-  Road: 97.13 %
-  Maritime: 0.57 %
-  Air: 0.27 %
-  Rail: 1.88 %

Production
 13th country in the European production ranking
 Produces **2.33 billion €**

EU trade
 Exports **968.84 million €**
 Imports **3.11 billion €**

Extra-European trade
 Exports **1.69 billion €**
 Imports **399.53 million €**

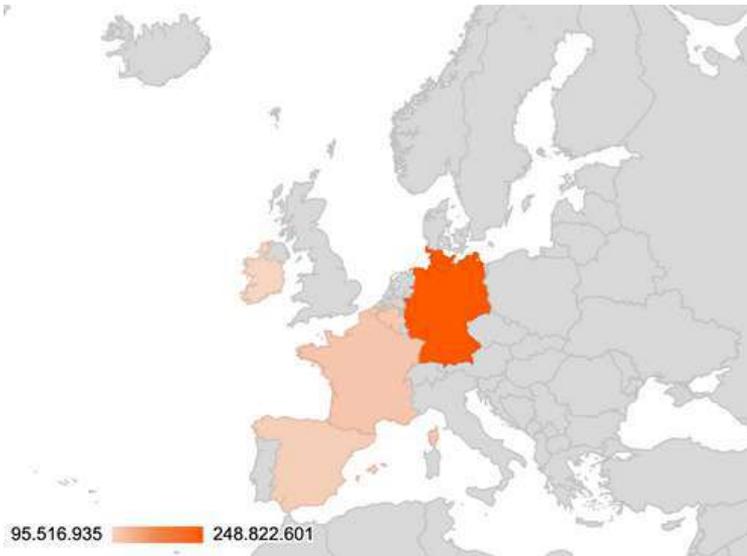
What pharmaceutical products do it export to the EU?



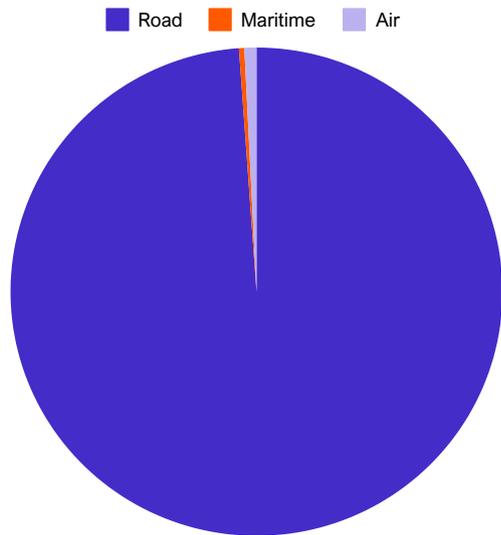
Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?

How is it transported?



Data in millions of euros, from the European Commission



Data in %, from the European Commission

-  Germany: 248.82 millions €, 5,643 t
-  France: 109.35 millions €, 3,315 t
-  Belgium: 105.57 millions €, 1,872 t
-  Spain: 103.34 millions €, 4,907 t
-  Ireland: 95.52 millions €, 1,679 t

-  Road: 98.86 %
-  Maritime: 0.35 %
-  Air: 0.79 %
-  Rail: -

Production
 18th country in the European production ranking
 Produces **655 million €**

EU trade
 Exports **869.99 million €**
 Imports **4.43 billion €**

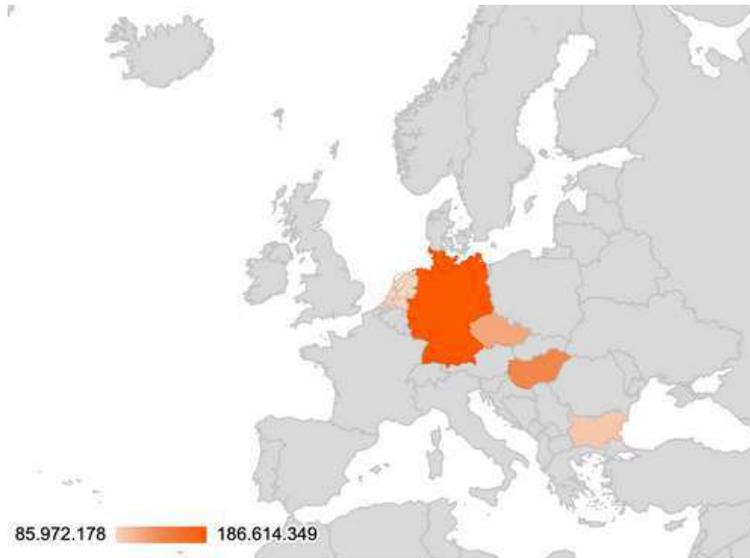
Extra-European trade
 Exports **310.73 million €**
 Imports **623.43 million €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

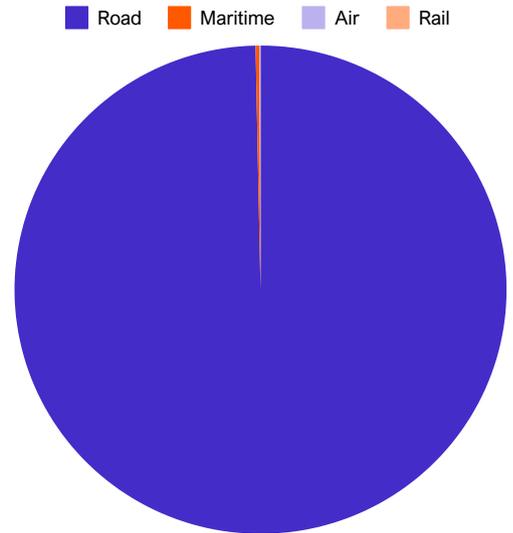
To which countries?



Data in millions of euros, from the European Commission

- 🇷🇴➔🇩🇪 Germany: 186.61 millions €, 3,509 t
- 🇷🇴➔🇭🇺 Hungary: 134.53 millions €, 2,573 t
- 🇷🇴➔🇨🇪 Czech Republic: 115.76 millions €, 398 t
- 🇷🇴➔🇧🇬 Bulgaria: 94.29 millions €, 6,084 t
- 🇷🇴➔🇳🇱 The Netherlands: 85.97 millions €, 344 t

How is it transported?



Data in %, from the European Commission

- 🚚 Road: 99.62 %
- 🚢 Maritime: 0.24 %
- ✈️ Air: 0.07 %
- 🚊 Rail: 0.01 %



Production

21th country in the European production ranking

Produces **356 million €**

EU trade

Exports **614.88 million €**

Imports **2.34 billion €**

Extra-European trade

Exports **70.88 million €**

Imports **230.48 million €**

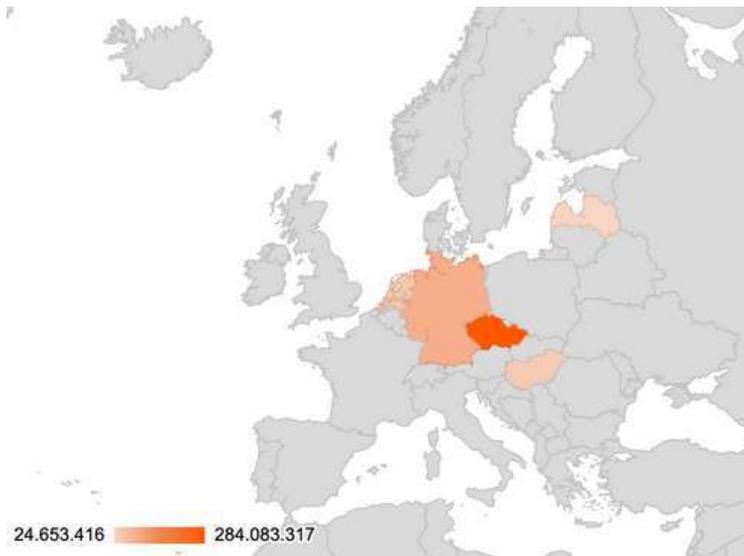
What pharmaceutical products do it export to the EU?



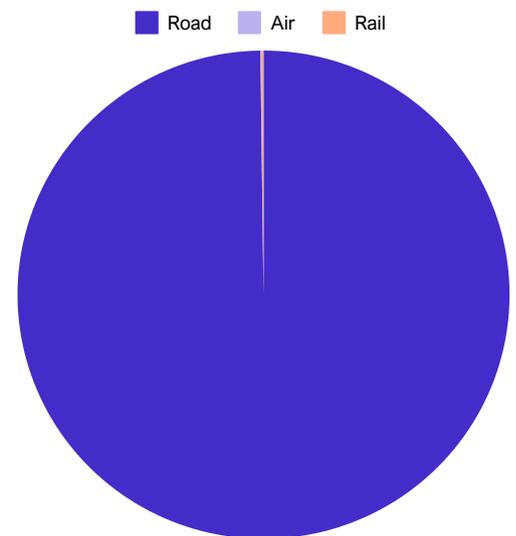
Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?

How is it transported?



Data in millions of euros, from the European Commission



Data in %, from the European Commission

- Czech Republic: 284.08 millions €, 3,032 t
- Germany: 86.42 millions €, 2,348 t
- The Netherlands: 47.80 millions €, 1,029 t
- Hungary: 41.73 millions €, 492 t
- Latvia: 24.65 millions €, 902 t

- Road: 99.80 %
- Maritime: -
- Air: 0.04 %
- Rail: 0.16 %



Production

9th country in the European production ranking

Produces **6.96 billion €**

EU trade

Exports **2.47 billion €**

Imports **2.03 billion €**

Extra-European trade

Exports **16.28 billion €**

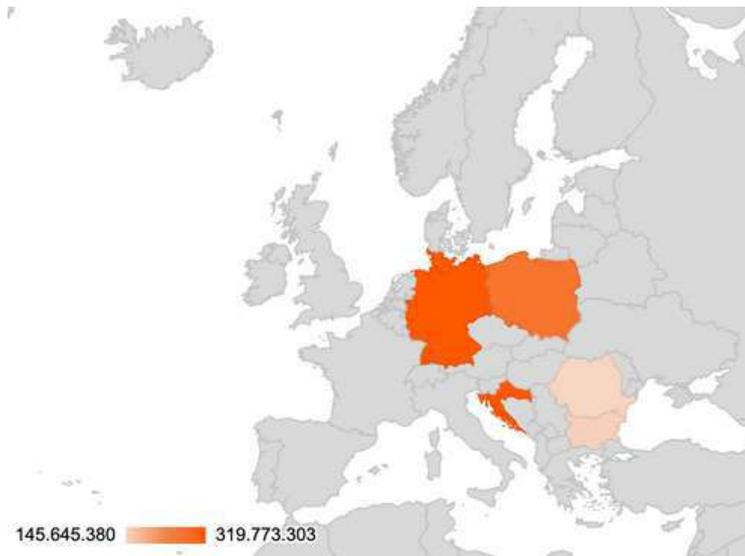
Imports **6.04 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

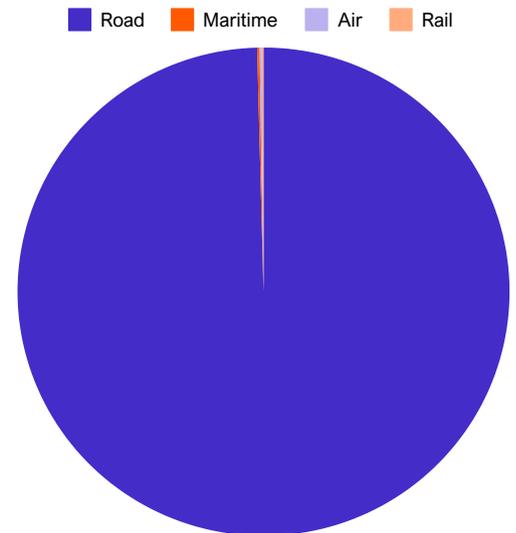
To which countries?



Data in millions of euros, from the European Commission

- Croatia: 319.77 millions €, 2,302 t
- Germany: 318.94 millions €, 2,263 t
- Poland: 264.92 millions €, 2,713 t
- Bulgaria: 151.15 millions €, 997 t
- Romania: 145.65 millions €, 1,454 t

How is it transported?



Data in %, from the European Commission

- Road: 99.59 %
- Maritime: 0.16 %
- Air: 0.14 %
- Rail: 0.11 %

Production
 5th country in the European production ranking
 Produces **22.96 billion €**

EU trade
 Exports **11.65 billion €**
 Imports **13.69 billion €**

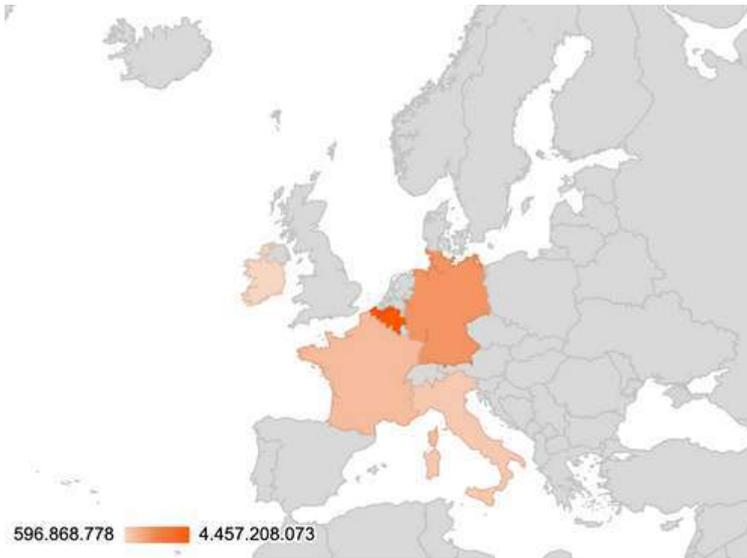
Extra-European trade
 Exports **8.82 billion €**
 Imports **7.48 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

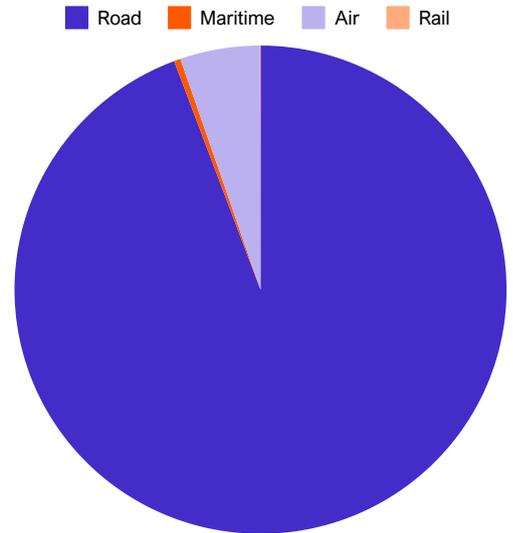
To which countries?



Data in millions of euros, from the European Commission

-  Belgium: 4.46 billions €, 18,701 t
-  Germany: 2.14 billions €, 43,936 t
-  France: 1.21 billions €, 37,851 t
-  Italy: 898.30 millions €, 28,694 t
-  Ireland: 596.87 millions €, 3,640 t

How is it transported?



Data in %, from the European Commission

-  Road: 94.25 %
-  Maritime: 0.43 %
-  Air: 5.24 %
-  Rail: 0.04 %

Production
 8th country in the European production ranking
 Produces **11.91 billion €**

EU trade
 Exports **5.74 billion €**
 Imports **4.71 billion €**

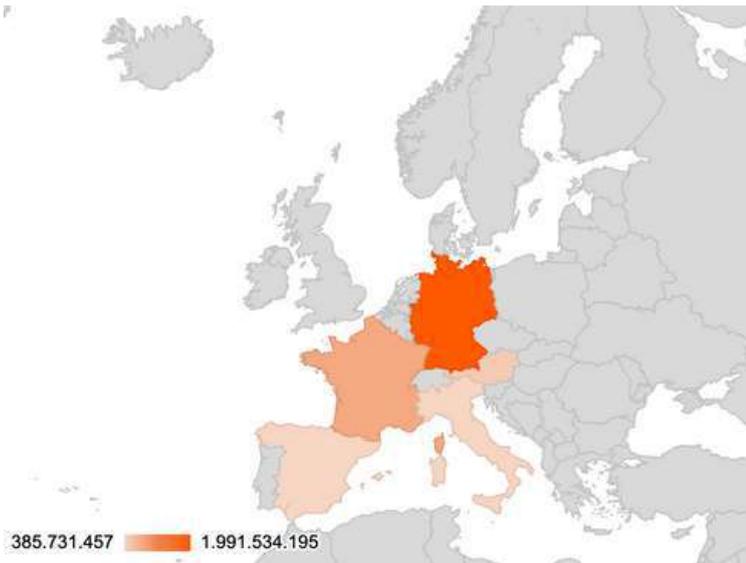
Extra-European trade
 Exports **6.87 billion €**
 Imports **1.34 billion €**

What pharmaceutical products do it export to the EU?



Data in % for 2023. Source: Own compilation based on data from the European Commission

To which countries?



-  Germany: 1.99 billions €, 8,829 t
-  France: 819.62 millions €, 3,765 t
-  Austria: 492.91 millions €, 1,197 t
-  Italy: 388.04 millions €, 2,320 t
-  Spain: 385.73 millions €, 1,187 t

Data in millions of euros, from the European Commission

Logista Freight in European pharmaceutical transport

Logista Freight is a transport company specializing in long-distance transport for the pharmaceutical sector.

We are part of **Logista**, one of the largest logistics companies in Europe specializing in distribution to proximity channels. Logista has been listed on the IBEX 35 since 2002 and has a market capitalization of over 3.5 billion euros, which reflects its efficient management and **financial strength**.

What do we offer the European pharmaceutical market?

We are GDP (Good Distribution Practice) **certified** and comply with the Good Distribution Practices required by this regulation, and we offer real-time traceability and temperature control, with 24/7 temperature monitoring and a predictive alert system.

We provide the industry with dedicated pharmaceutical transport solutions that guarantee high standards of quality, safety and efficiency. We have advanced technology to monitor and control temperature in real time, ensuring the integrity of the goods throughout the journey.

In addition, our wide geographical coverage and our fleet equipped with latest-generation security systems allow us to adapt to the needs of the European pharmaceutical sector. This strategy, based on innovation and reliability, strengthens our ability to meet the regulatory requirements and expectations of one of the most demanding markets for transport throughout the supply chain.

Safety is our most important added value

We are TAPA certified, but our internal requirements are stricter than those specific to this certification.

- Dedicated and specialized equipment.
- Intelligent software that discriminates and prioritizes risks.
- Geofencing and connection to a 24/7 multilingual alarm centre with European coverage.
- Vehicles equipped with more than 26 sensors to detect and manage critical situations.



Technology for a more efficient transport

- **Teseo Web Platform:** our technological platform puts us at the forefront of technology. Developed in-house to plan, optimize and control all transport tasks, it allows integration with our customers' systems, facilitating comprehensive management of the entire value chain.
- **Data analysis:** we optimize demand planning and perform preventive vehicle maintenance to ensure maximum operational efficiency.

Focused on sustainability

At Logista Freight, we are committed to sustainability and integrate it as a strategic pillar of our operations. Our ESG plan (2024-2026) includes specific targets to reduce our carbon footprint:

- Achieve **90% of kilometres with sustainable vehicles** by 2026.
- Promote decarbonization through the use of biofuels, electric vehicles and modal transport, including duo-trailers.
- Invest in technologies that drive a sustainable economic system.

Services

- Full European Coverage
- Our portfolio includes FTL, LTL, Express (VAN) and Sea Freight transportation services

Do you want more information?

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Logista

FREIGHT