

Italy's CDMO Ascent Lands in San Diego and Asia Should Be Watching

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As the Italian National Pavilion heads to BIO 2026 on the back of a 54% surge in pharmaceutical exports to the United States, Europe's outsourcing leader is making a partnering pitch that Asia-Pacific's contract manufacturers, market-access teams and dealmakers will recognise as their own.



When the **BIO International Convention** opens in San Diego on 22 June, the Italian National Pavilion will arrive carrying an unusually confident set of numbers. In 2025, Italian pharmaceutical exports to the United States reached €15.7 billion — a 54% jump on the previous year that cements the US as the single largest destination for Italian medicines. For an Asia-Pacific industry that has spent the past decade arguing about where the world's drugs will actually be made, that figure is more than a European footnote. It is a signal about where contract capacity, regulatory know-how and partnering momentum are pooling.

Organised by the Italian Trade Agency (ITA) with the country's foreign-affairs and enterprise ministries, and backed by Farindustria, Federchimica Assobiotech and the Invitalia / Invest in Italy network, the delegation is not pitching Italy as a destination for tourists in lab coats. It is pitching Italy as a place to get things built, tested and approved — the same value chain Asian biopharma is racing to localise at home.

Italy's life-sciences sector, by the numbers

€52B	+54%	24%
annual LS exports	pharma exports to US, 2025	of EU CDMO output

Sources: Italian Trade Agency (ITA); Farindustria. Life-sciences exports have grown 60% over five years.

A €52 billion engine — and what powers it

Life sciences now account for more than a tenth of Italy's GDP, and the export story underneath that share is the part worth studying. Over five years, the country's life-sciences exports have climbed 60% to roughly €52 billion a year. Strip out finished drugs and the picture sharpens further: Italy ranks first in the European Union for the value of pharmaceutical

CDMO manufacturing — the outsourced development and production that powers other companies' pipelines — with a 24% slice of the EU total.

There is an innovation signal too. Italy ranks first in Europe and second worldwide for patent productivity, the ratio of applications filed to patents actually granted. Translation for an Asian licensing or business-development reader: Italian originators tend to file claims that hold up. And biotech specifically is now the largest component of Italy's high-tech exports to the US, at 36.8% of the total, with €3.2 billion of biotech crossing the Atlantic last year.

Why this matters from Asia

For BioSpectrum Asia's readership, the relevant question is not how well Italy sells into America — it is what an Italy operating at this scale can do for an Asian company. Three threads stand out.

1. Outsourced capacity that travels

Asia-Pacific's own CDMO build-out is well underway, but qualified overflow capacity for complex biologics remains scarce. **Menarini**, a Rome-area CDMO, works to AIFA/EU GMP standards across mammalian and microbial platforms and on newer formats — bispecifics, ADCs, fusion proteins — precisely the modalities filling Asian pipelines. Preclinical CROs **Accelera** and **IRBM** extend the same logic upstream into discovery and GLP toxicology.

2. A door into the European market

For Asian companies eyeing EMA submissions, EU HTA and the incoming Joint Clinical Assessment regime, the regulatory and reimbursement exhibitors are the quiet headline. **Regulatory Pharma Net** handles EU regulatory affairs and market access end to end; **Masotti Consulting** and **Società Italiana Brevetti** cover corporate, public-procurement and IP terrain that newcomers routinely underestimate.

3. A Singapore node already in place

Distribution specialist **Euromed Pharma**, part of the Petrone Group, already runs a Singapore branch among its ten global offices, handling hospital-line, orphan and unlicensed products on an order-to-cash basis and managing comparator sourcing for clinical trials. Its established and 3PL footprint is a ready-made bridge between European supply and Asian demand.

A fourth thread runs through the whole delegation: predictive, non-animal science. As regulators in the US, Europe and increasingly Asia move to accept New Approach Methodologies, Italy is arriving with working platforms rather than slideware. BiomimX builds beating organ-on-chip models — its heart-on-a-chip has been qualified as a cardiotoxicity predictor — while InSilicoTrials generates regulatory-grade evidence through simulation and virtual patients, and Butterfly Decisions applies multi-agent AI to advisory boards and consensus programmes. For Asian R&D teams under pressure to cut cost, time and animal use simultaneously, these are partners worth a meeting.

The delegation at a glance

Thirteen companies anchor the Italian Pavilion, joined by regional clusters, science parks and investment-attraction agencies. The spread is deliberately full-stack — from the bench to the boardroom.

Capability

Italian Pavilion exhibitors

Preclinical CRO & discovery

Accelera (Milan); IRBM (Rome); Fondazione Ri.MED (Palermo)

Biologics CDMO

Menarini Biotech (Rome) — mAbs, bispecifics, ADCs, fusion proteins

Predictive & in-silico models

BiomimX (Milan, organ-on-chip); InSilicoTrials (Trieste); Butterfly Decisions (Salerno, AI-assisted decisioning)

Capability	Italian Pavilion exhibitors
Biotech innovators	Takis (Rome) — genetic vaccines, cancer immunotherapy
Market access, IP & legal	Regulatory Pharma Net (Pisa); Società Italiana Brevetti (Rome); Masotti Cassella (M)
Distribution & packaging	Euromed Pharma (Naples, incl. Singapore); Soffieria Bertolini (Turin, glass primary p
Clusters & investment	BION & Invest in Lombardy; bioPmed/Bioindustry Park (Piedmont); FVG Life Science HEAL Italia; Invest in Trentino; YesMilano

Soffieria Bertolini, a glass primary-packaging maker since 1935, rounds out the industrial side with US, Canada and China DMF coverage.

Research diplomacy: the Montalcini tour stops in San Diego

Opening day also brings the Montalcini Global Biotech Tour & Italian Research Day in the World, staged with the Consulate General of Italy in Los Angeles. After 2025 stops from San Francisco to Vienna, the San Diego edition centres on a roundtable moderated by Clarissa Ceruti of ISSNAF, with Marco Pravetoni (CounterX Therapeutics), Luca Scaccabarozzi (Euromed Pharma), Alba Grifoni (La Jolla Institute for Immunology) and Nicola Torre (Menarini Biotech). Opening remarks come from Consul General Raffaella Valentini, ITA Deputy Trade Commissioner Francesca Mauri, and Lombardy regional ministers Guido Guidesi and Guido Bertolaso — a reminder that, in Italy as in much of Asia, regional government is an active player in the life-sciences economy.

Under the OpportunItaly banner

BIO 2026 has been designated a strategic event within OpportunItaly, the ITA-led business-acceleration programme built to connect international buyers, distributors and entrepreneurs with Italian companies. For Asian visitors, that framing matters: the pavilion is staffed not only to show technology, but to open commercial conversations — soft-landing support, co-development, distribution and investment included.

THE TAKEAWAY FOR ASIA-PACIFIC

Italy is not arriving in San Diego to admire the scenery. It is arriving as the EU's leading contract manufacturer, with a 54% export share behind it and a pavilion engineered for partnership. For Asia-Pacific companies weighing where to outsource complex biologics, how to reach European patients, or whom to trust on predictive models, the Italian stand is one of the more useful addresses on the BIO floor.

EVENT FILE

BIO International Convention 2026 — San Diego, 22–25 June 2026. Expected: 20,000+ attendees from 76+ countries, 1,500+ exhibitors, ~150 sessions and 600+ speakers across 18 focus areas.

Italian National Pavilion — organised by the Italian Trade Agency (ITA). Italian Research Day roundtable: 22 June, with the Consulate General of Italy in Los Angeles.