



Europe's Patent Landscape by **Technology and Country**



**An analysis by Azami Global
August 2025**



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A note from our CEO

Welcome to Azami's European Patent Technology Report, a data led snapshot of where innovation is taking off and how fast it is growing.

At Azami, we don't just operate in IP. We operate on data. Every day, our teams turn fragmented global records into usable signals that help in house teams and law firms make better decisions: where to file, which partners to trust, and how to allocate budgets for real impact. This report is one expression of that mission: rigorous, readable, and relentlessly practical.

What you'll find inside is simple by design: a clear view of what each country files most, how those portfolios differ from the European average, and how long applications take to publish. We use top level IPC technology categories so patterns are easy to see at a glance, and we highlight "outliers" where countries truly specialize, whether in Electricity, Chemistry and Metallurgy, Operations and Transport, or beyond.

Just as important is how we measure. We analyzed the full 2023–2024 window, counted technologies with duplicates allowed (because a single patent can span multiple areas), and used median times to publication to reduce noise from late 2024 filings. The goal isn't to crown winners; it is to give you a trusted baseline for planning, the kind you can bring to your next budget meeting or board update and say, "Here's where our opportunities really are."

Azami's belief is straightforward: when data is organized the right way, quality follows. Better agent selection, smoother cross border work, faster cycles, stronger outcomes. If this report sparks a question or a hypothesis you want to test, our team would love to explore it with you.

Thanks for reading, and here's to building IP strategies powered by evidence, not assumptions.



Daniel Tjoernelund

Chief Executive Officer, Azami Global

Introduction

This report maps where European patent activity is concentrating by technology and by country across 2023–2024. Using an EP-focused extract from PATSTAT, we categorize every filing into the top-level IPC technologies (Human Necessities; Operations & Transport; Chemistry & Metallurgy; Textiles & Paper; Fixed Constructions; Mechanical Engineering / Lighting / Heating; Physics; Electricity) and compare each country's portfolio mix with the EP-wide average. We also benchmark speed to publication to highlight where filings move through the pipeline faster—or slower—than peers.

WHAT THIS SHOWS

01

Who files the most and what they file:

Absolute volumes by country alongside each country's technology mix.

02

Specialization:

Where countries over-index vs. the EP average (e.g., electronics-heavy or chemistry-centric portfolios).

03

Time to publication:

Median days (shown as years) from filing to publication for countries with $\geq 1,000$ filings.

- ③ Technology labels use plain English (no IPC letters).
- ③ Shares are calculated with duplicates allowed—a patent can belong to multiple technologies, so category totals can exceed the number of unique patents.
- ③ Country is based on agent location; where relevant, we call this out in captions.
- ③ Timing note: Even with a full two-year window, some late-2024 filings may not yet have published; medians are used to reduce skew from these right-censored records.

WHO'S INCLUDED

To keep signals clear and comparable, most charts focus on countries with $\geq 1,000$ filings over 2023–2024. Where helpful, we also show EP-wide totals and versions excluding the largest markets so emerging patterns are easier to see.

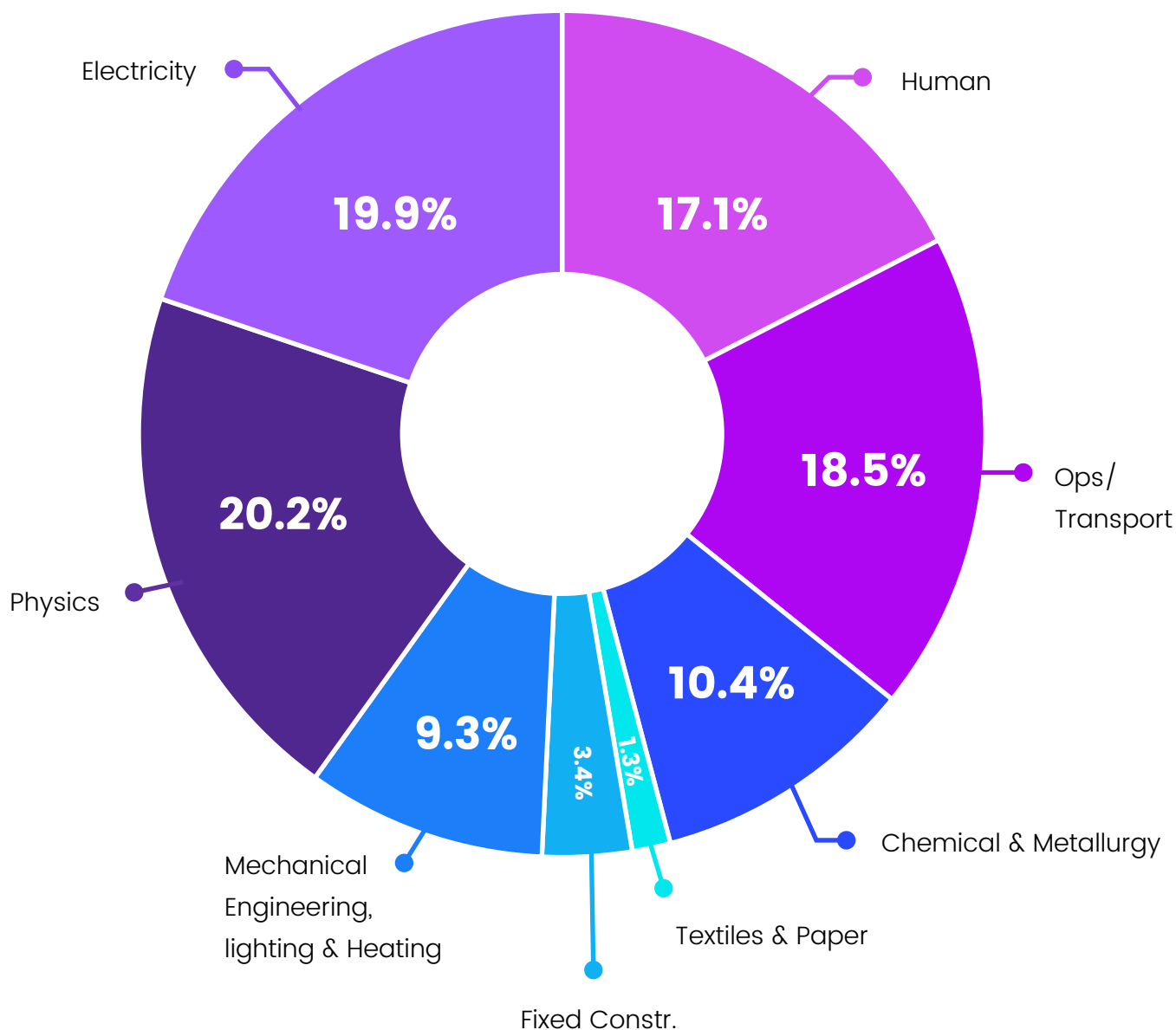
Use the visuals that follow to quickly identify your best “fit” markets, find technology hot spots, and spot where cycle times may impact filing strategy.



EP-wide Technology Mix

Absolute Counts

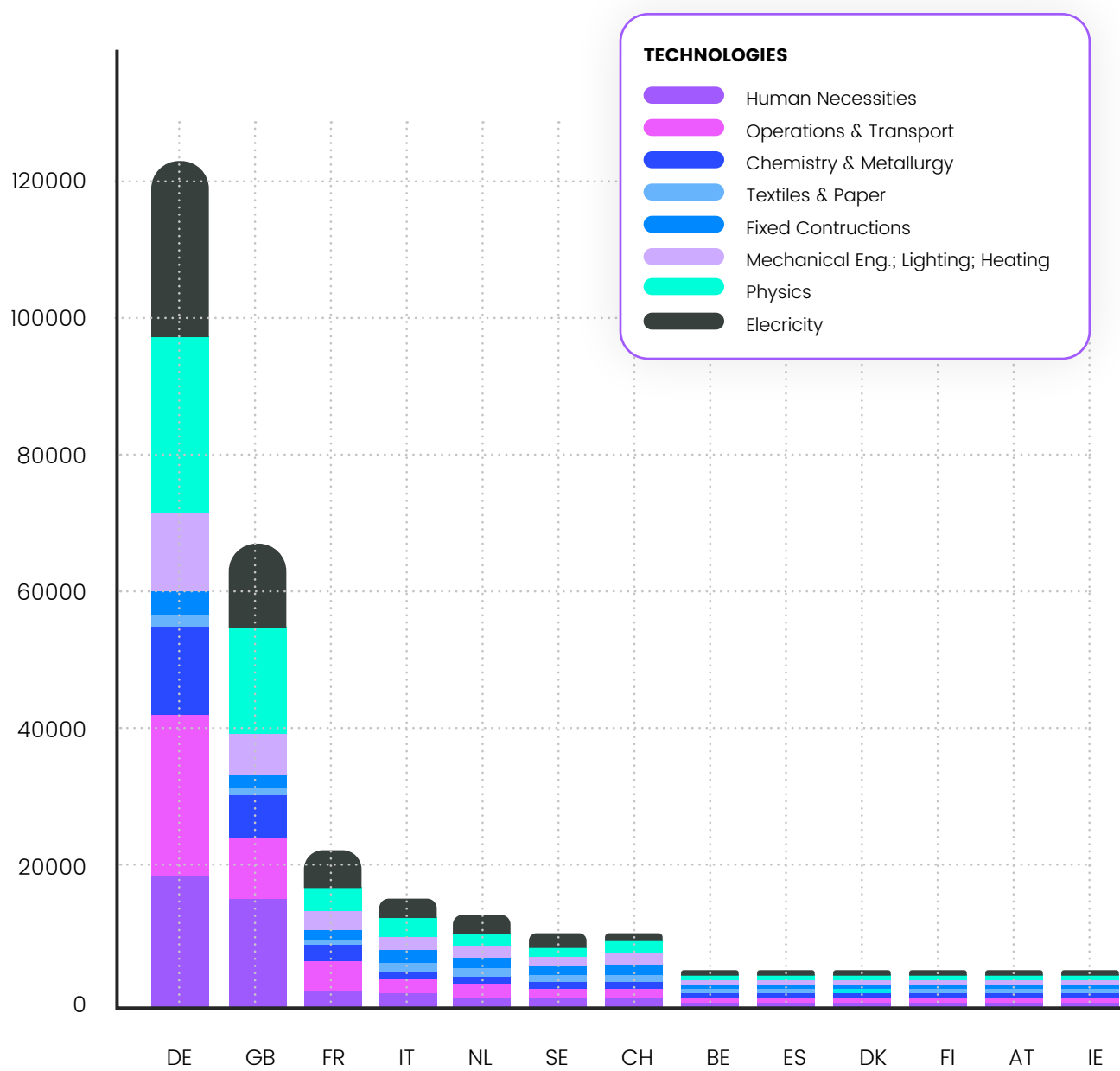
A single view of the overall EP distribution by technology across 2023–2024 (duplicates allowed).



Filings by Country & Technology

Absolute Counts

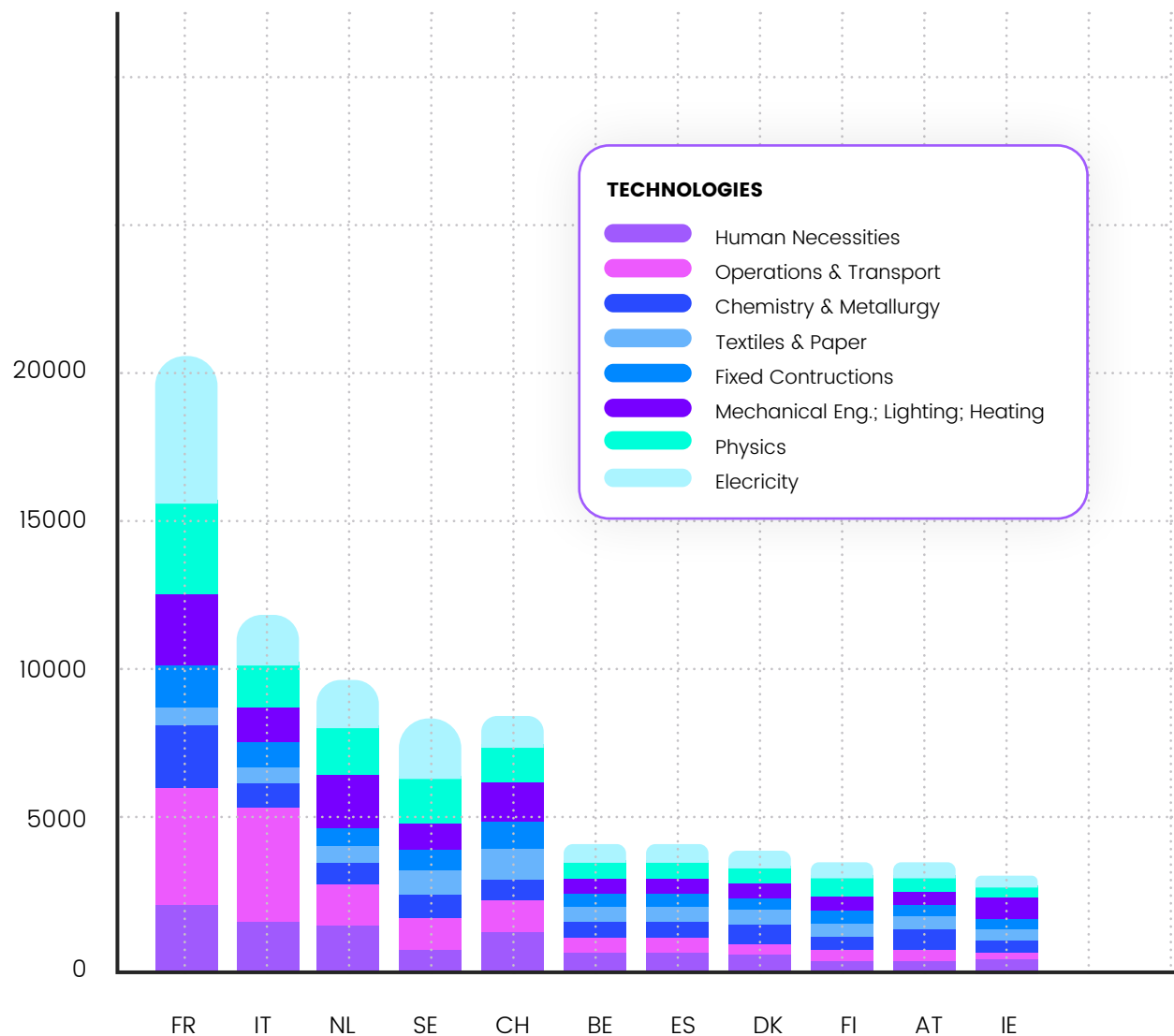
Stacked bars show the true volume of filings per country and how that volume splits across technologies.



Filings by Country & Technology

Absolute Counts (Excluding DE & GB)

Removes Germany and the UK so the next-tier markets' volumes and mixes are easier to compare.



EP (2023–2024)

Which technologies dominate where?

Rank	Country (≥ 5k filings)	Largest IPC bucket	Share of that country's filings	vs EP average
1	 Germany	H — Electricity	21.7%	+1.8 ppt
2	 United Kingdom	G — Physics	22.9%	+2.7 ppt
3	 France	B — Operations / Transport	22.8%	+4.3 ppt
4	 Italy	B — Operations / Transport	26.4%	+7.9 ppt
5	 Netherlands	A — Human Necessities	22.8%	+5.7 ppt
6	 Sweden	H — Electricity	30.4%	+10.5 ppt
7	 Switzerland	B — Operations / Transport	20.6%	+2.1 ppt

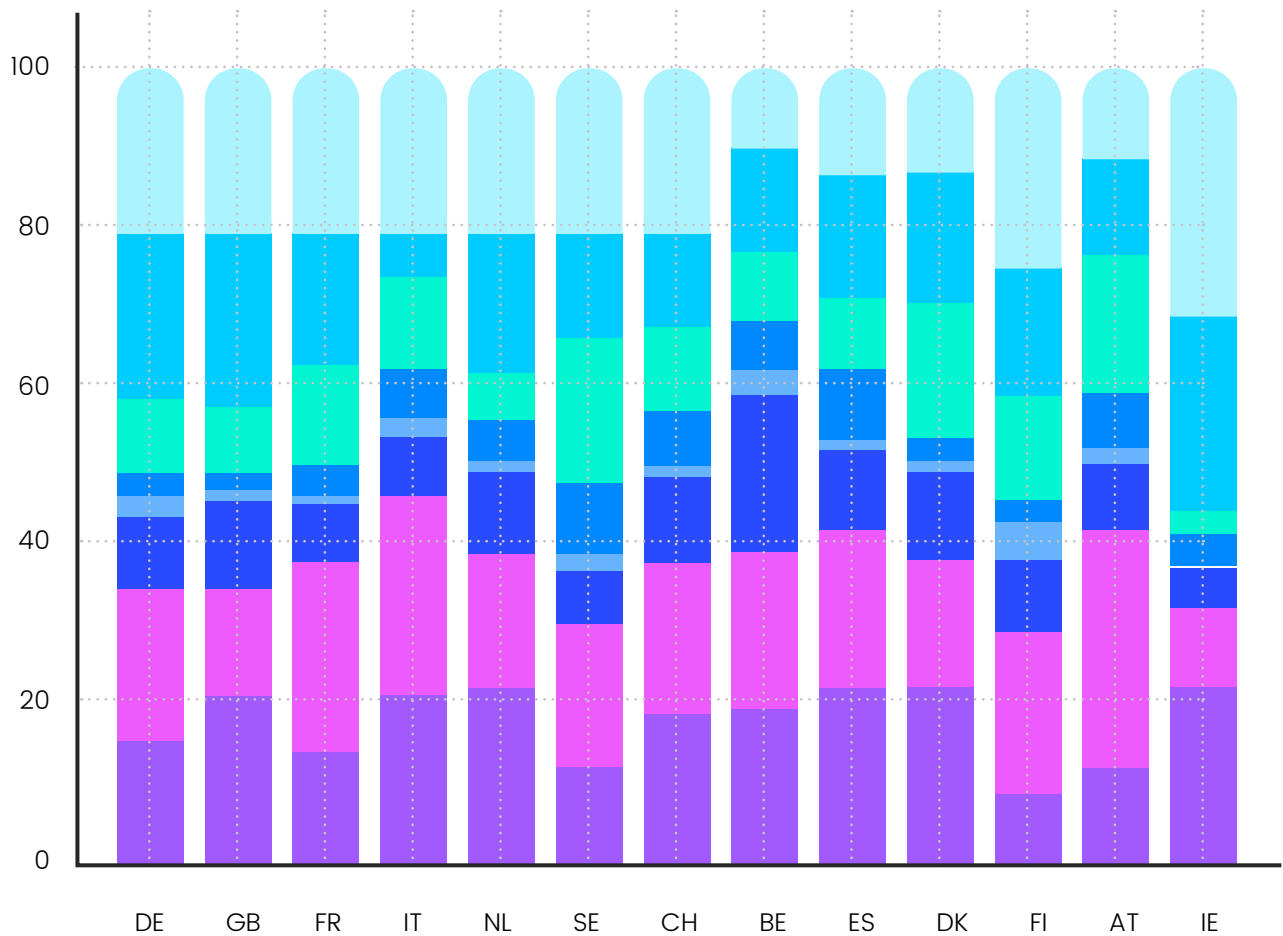
EP-wide average IPC mix (duplicates allowed):

G 20.2% • H 19.9% • B 18.5% • A 17.1% • C 10.4% • F 9.3%
• E 3.4% • D 1.3%

Tech Mix by Country

100% Stacked (Percentage)

Normalizes each bar to 100% so you can compare portfolio composition across countries independent of size.



TECHNOLOGIES

- Human Necessities
- Operations & Transport
- Chemistry & Metallurgy
- Textiles & Paper
- Fixed Contructions
- Mechanical Eng.; Lighting; Heating
- Physics
- Electricity

Attention

Grabbing Outliers ($\geq 1k$ filings)



Ireland → H

Electricity +11.2 ppt over EP average — the most electronics-heavy portfolio in the cohort.



Sweden → H

Electricity +10.5 ppt — another electricity standout.



Belgium → C

Chemistry +9.4 ppt — the chemistry hub of Europe.



Austria → B

Operations / Transport +8.8 ppt (and) - Fixed Constructions +6.0 ppt — strong transport + construction skew.



Italy → B

Operations / Transport +7.9 ppt — transport manufacturing bias.



Denmark → F

Mechanical +6.3 ppt (and) — Human Necessities +5.4 ppt — machinery + health/biotech tilt.



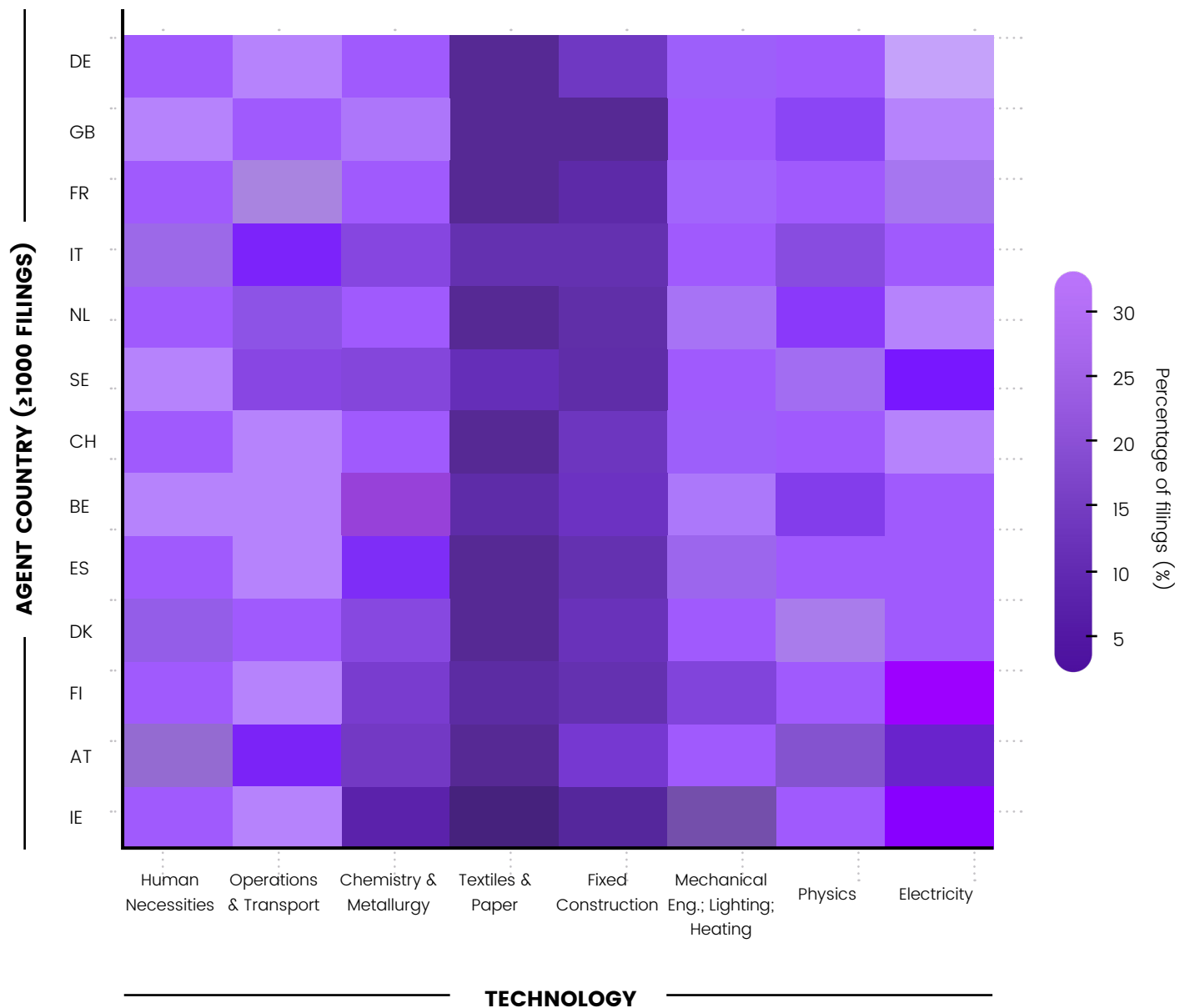
Netherlands → A

Human Necessities +5.7 ppt — outsized human-necessities share.

Tech Mix by Country

Heat Map (Percentage)

Shows the percentage share of each technology in every country's portfolio ($\geq 1,000$ filings), making specialisations and gaps instantly visible.



TECHNOLOGY NARRATIVES

1 “Electricity countries”

SE and IE lead an electronics surge (H — Electricity well above EP average), with DE also tilted to H.

2 “Transport belt”

FR, IT, CH, AT index high in B — Operations / Transport (operations/transport), pointing to automotive, rail, and logistics systems strength.

3 “Chemistry corridor”

BE is the chemistry specialist of the high-volume set.

4 “Human-first portfolios”

NL, ES, DK over-index in A — Human Necessities (health, medtech, consumer).

5 “Divergence matters”

These deviations ($\pm$ percentage-points vs EP average) are the best quick signal of national specialisation.

SPEED TO PUBLICATION (MEDIAN; $\geq 1K$ FILINGS)

Slowest: IE 5.21y, GB 5.14y, SE 4.73y, DK 4.72y, DE 4.68y.

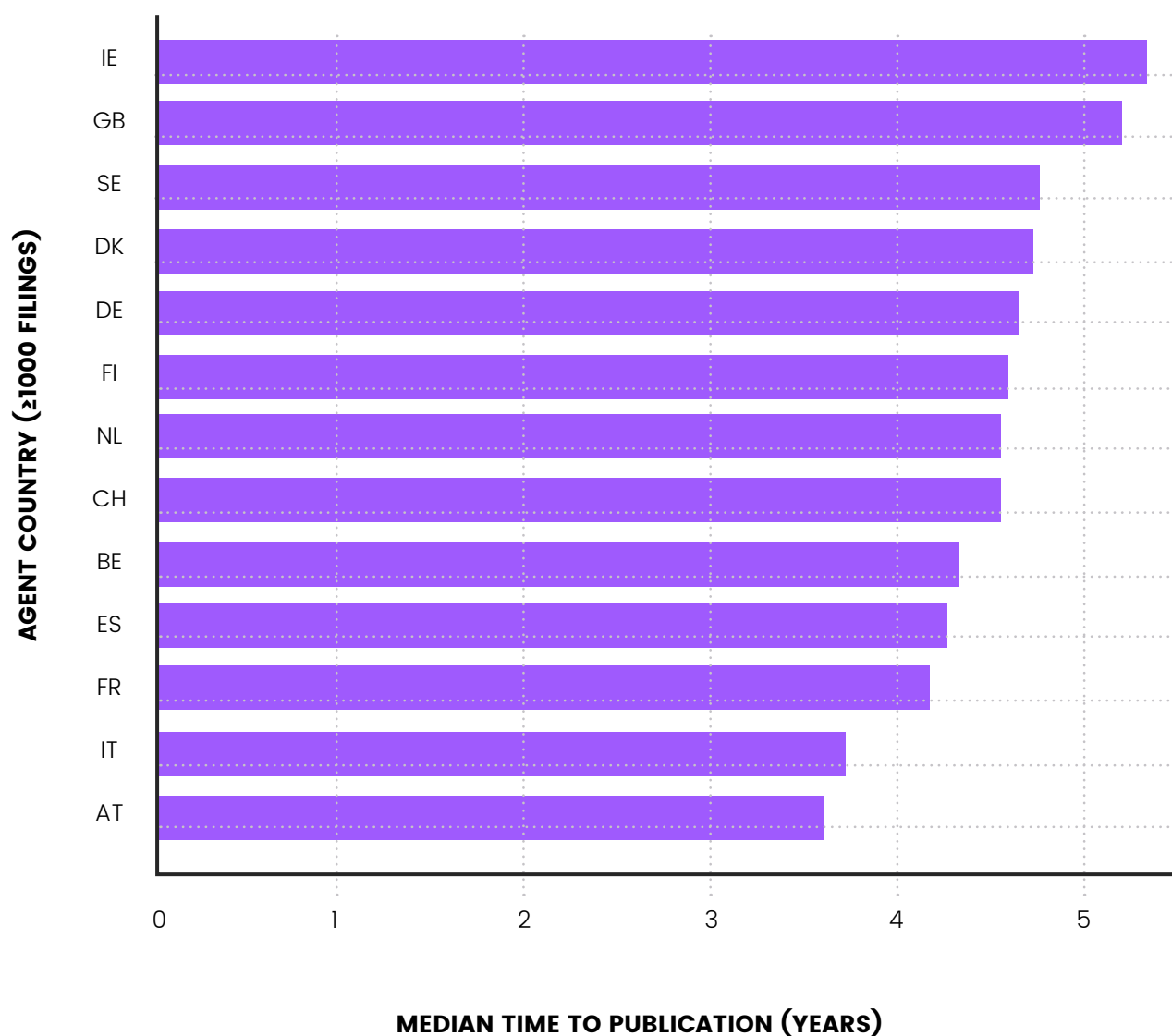
Fastest: AT 3.70y, IT 3.79y, FR 4.16y, ES 4.24y, BE 4.32y.



Note: Times are medians of publication – filing; 2024 filings can still be unpublished (right-censoring), so medians are the safer central measure.

Median Time to Publication by Country (Years)

Ranks countries by median publication lag (filing → publication) for markets with ≥1,000 filings.



METHODOLOGY NOTES

- > Window: Jan 1, 2023 – Dec 31, 2024 (full two years).
- > Data: PATSTAT extract; IPC mapping at top level A–H.
- > Duplicates allowed: a patent can carry multiple IPCs; category totals exceed patent counts. Shares are computed over all IPC tags assigned in each country.
- > Country is based on agent and not applicant

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