



Pipette adding blue fluid test tube close up | © Stockphoto/Chet Chaimangkhalayon

Medical Biotechnology

Where Science, Innovation and Quality Meet

Germany is the world's leading medical biotech nation behind the US. The industry's strength comes from the presence of long-established and start-up companies alike. Industry, government, and the research sector are pulling in one direction to build on the thriving sector's already strong market foundations. With the largest amount of biotech companies in Europe, world-class research infrastructure, and internationally renowned scientists, Germany has firmly established itself as an international medical biotechnology hub.

Latest Publication



Fact Sheet: Biotechnology Clusters in Germany | © GTAI

Biotechnology Clusters in Germany

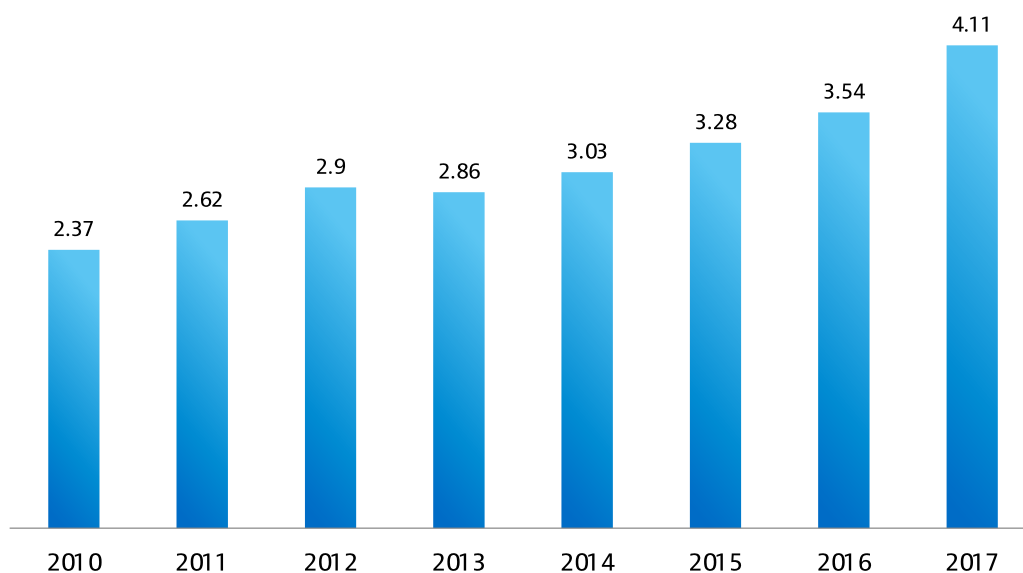
Germany features one of the best environments for biotechnology companies worldwide. Along the entire value chain Germany's biotechnology landscape is known for its outstanding capabilities, resources, and infrastructure. [More ▶](#)

Facts & Figures

Key figures of the biotech sector in Germany (2017)

Number of dedicated biotechnology companies	646
Number of other biotechnology-active companies	141
Number of employees in biotechnology companies	21,860
Number of employees in the other biotechnology-active companies	23,800
Revenue of dedicated biotechnology companies EUR bn	4.1
R&D expenditures of dedicated biotechnology companies EUR bn	1.1

Revenue of Dedicated Biotechnology Companies in EUR Billion



Source: Biocom AG 2018

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Revenue of dedicated biotechnology companies in EUR billion | © Biocom AG 2018

Innovation Infrastructure

Science and industry need to work together closely in order for innovations to be commercialized successfully. German bioclusters are proving to be important new technology impulse givers in this respect.

Germany's Bioregions

The BioRegions are regional initiatives for the advancement of modern biotechnology in Germany. Over the past three decades, these biotechnology clusters have developed to become Europe's leading R&D hubs. Each region facilitates collaboration between universities, R&D institutes and private sector companies. Around 30 BioRegions are active members of AK BioRegio, whose goal is to advance the German biotechnology sector by coordinating and promoting local activities. AK BioRegio advances the exchange between regional initiatives and relays its expertise to political decision makers.

Investors benefit from easy access to networks and funding for research projects. The BioRegions also include technology parks tailored to the specific needs of biotechnology companies. Commonly known as BioParks, these centers offer an ideal infrastructure - including lab space and clean rooms - as well as a range of services for both start-up and well established companies.

- [Biotechnology Clusters in Germany - Fact Sheet \[pdf\]](#) ▶
- [Council of German BioRegions](#) ▶

Growth drivers: Biopharmaceuticals Market

Big pharmaceutical and smaller biotechnology companies alike are focusing on drug discovery and development of medicines produced by biotechnological processes.

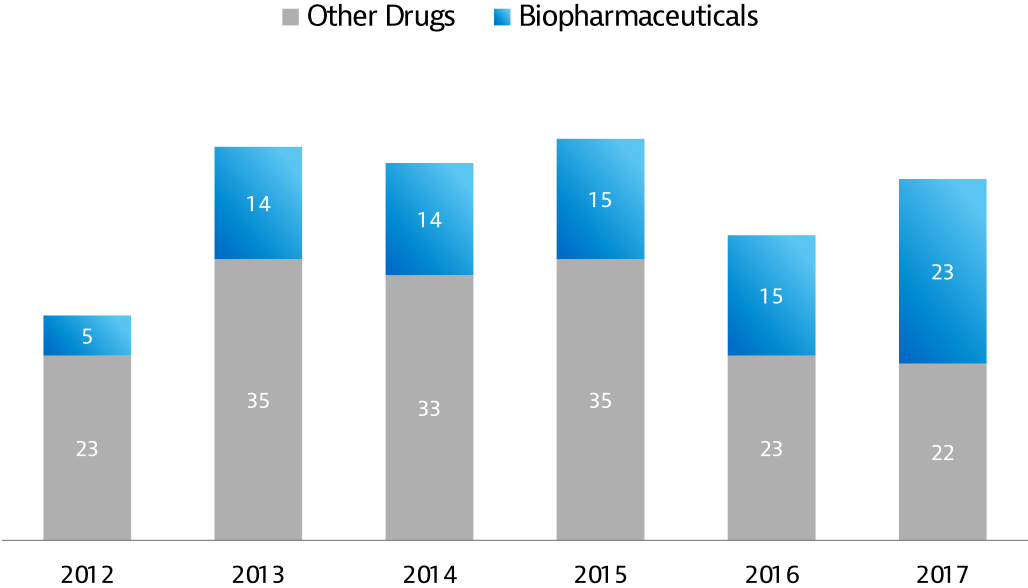
Small molecules are moving to the background in medicine development as the result of a major paradigm shift to biopharmaceuticals. This is reflected by the increasing sales of biopharmaceutical products worldwide.

According to a report by Boston Consulting Group and the Association of Research-Based Pharmaceutical Companies (vfa), sales of biopharmaceuticals in Germany increased to EUR 10.2 billion in 2017 (growth of 10.3 percent compared to 2016). Growth was seen in nearly all fields of application, particularly in drugs treating immunological (e.g. rheumatic) diseases and cancer.

The number of biopharmaceuticals in clinical development increased from 604 in 2014 to 639 in 2017, reflecting continued high investment in the biopharmaceutical pipeline.

In 2017, a record-breaking 51% of all new drug approvals were biopharmaceuticals. By the end of 2017, a total of 274 biopharmaceutical drugs were approved for the German market – more than ever before. Divided into pharmacological classes, vaccines and monoclonal antibodies are leading in numbers with 23% each, followed by insulin with 14%.

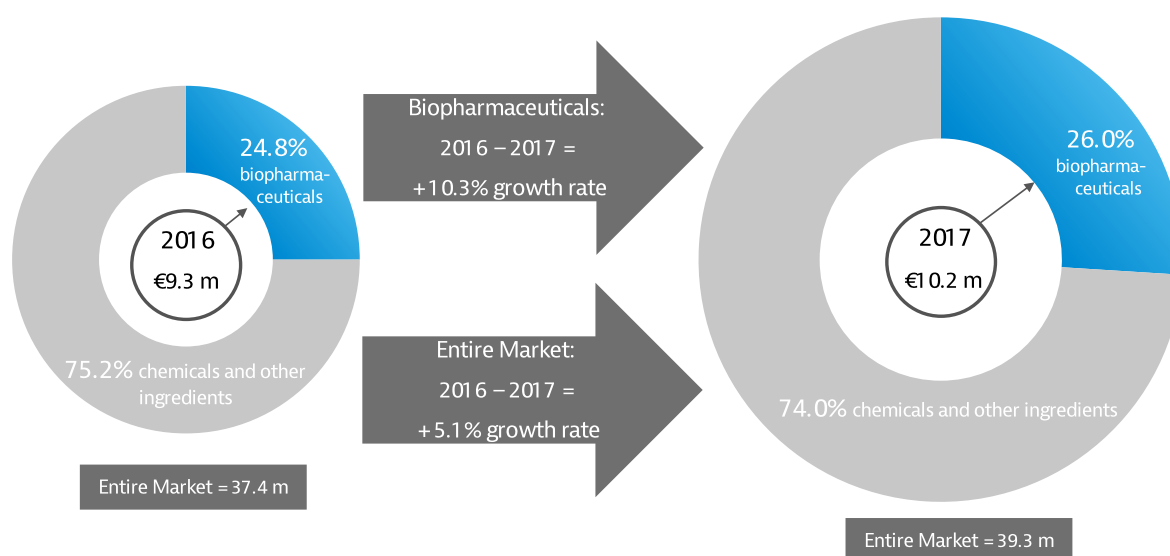
Number of new drug approvals



Source: Federal Statistics Office 2018
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Number of new drug approvals | © Federal Statistics Office 2018

Biopharmaceuticals Value Growth Rate in Percent



Source: IMS Health, Boston Consulting Group 2018
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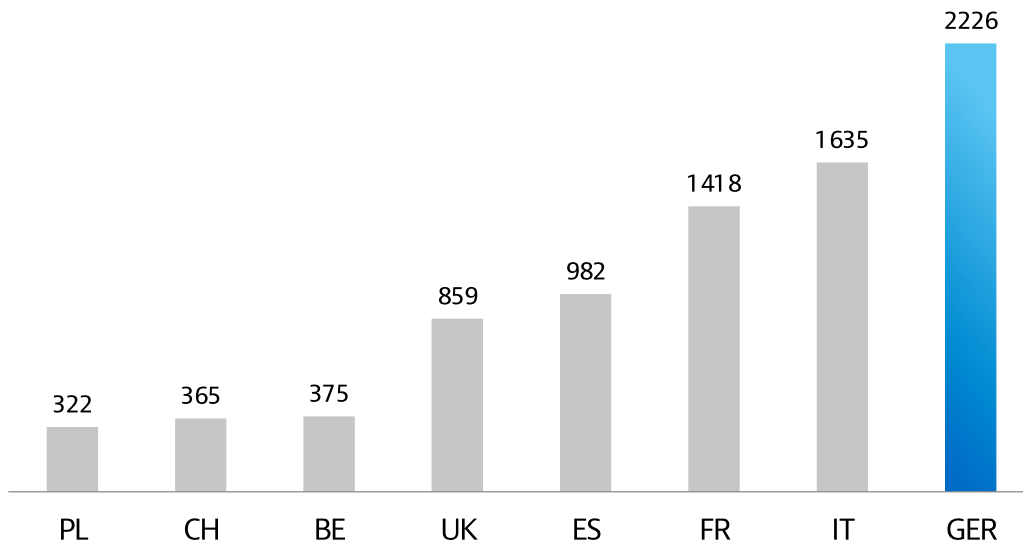
Biopharmaceuticals Value Growth Rate in Percent | © IMS Health, Boston Consulting Group 2018

- [Industry Overview Pharmaceutical Industry in Germany \[pdf ▶\]](#)

Growth drivers: IVD & Molecular Diagnostics

In-vitro diagnostics (IVDs) are a crucial part of modern medicine: laboratory based tests performed on biological samples provide information that is key for the prevention, treatment and management of diseases. Today, around two third of all clinical diagnoses are made thanks to IVD´s. With more than EUR 2 bn in annual revenue, Germany represents the largest IVD market in Europe and second worldwide behind the USA.

Diagnostic industry revenue in EUR million



UK only companies which participate in GMDS
France: Data include only the central laboratory IVD market
Source:EDMA 2016

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Diagnostic industry revenue in EUR million | © EDMA 2016

Molecular diagnostics (Dx) has emerged as one of the largest and fastest growing sectors of the IVD industry. Molecular Dx already enjoys more than 10 percent share of the entire German diagnostics market and boasts a growth rate more than twice that of the entire IVD market as such.

- [In Vitro Diagnostics – Find your partner \(EIG\) \(German\)](#) ▶




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