Germany’s Healthcare Market

Germany’s healthcare market is No. 1 in Europe by market volume, number of patients, medical technology manufacturers, and healthcare providers.

Healthcare spending in Germany exceeded €1 Billion per day in 2017, not including expenditure for wellness and fitness. The market has grown at a rate of 3.8% over the past 10 years. With more than 7.3 million employees and exports in excess of €126 billion, healthcare is one of the largest economic sectors in Germany.

Video: Smart Hospitals in Germany

With aging populations and increasing demand for medical services, AI and other digital innovations are going to become a crucial part of the healthcare of the future.

Latest Publication: Healthcare & Life Sciences
GERMANY’S HEALTHCARE MARKET

Latest Publications

Looking for detailed reports on the Healthcare and Life Sciences industry segments and opportunities for you? Check out our full range of publications.

Our Industry in Numbers

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Healthcare Expenditure (by OECD definition)</td>
<td>€ 374 billion</td>
</tr>
<tr>
<td>Market Growth (Ø 2006-2017)</td>
<td>3.8%</td>
</tr>
<tr>
<td>Employment</td>
<td>7.3 million</td>
</tr>
<tr>
<td>Exports</td>
<td>€ 126.4 billion</td>
</tr>
<tr>
<td>Imports</td>
<td>€ 103.7 billion</td>
</tr>
</tbody>
</table>

- Medical technology: 12,000
- Pharmaceutical: 1,170
- Biotechnology: 787

Source: Statista, BMWi 2018

Health Insurance

Germany achieves almost universal health insurance coverage

Health insurance coverage is mandatory in Germany. Insurance premiums are shared by employers and employees. The vast majority of the population is enrolled in public health insurance plans. About 10% choose private providers. Both publicly and privately insured can choose their provider. Currently, there are 112 public and 44 private health insurance companies operating in Germany (2017).
Health Insurance Coverage in Germany

More than 1,900 hospitals with nearly 500,000 beds operate in Germany – not including rehabilitation or elderly care facilities. The overall number of medical hospitals is declining as smaller general hospitals close or merge with other hospitals to increase efficiency.

### Key Data about German Hospitals

<table>
<thead>
<tr>
<th>Year</th>
<th>Hospitals</th>
<th>Beds</th>
<th>Cases</th>
<th>Medical staff (full time)</th>
<th>Average length of stay</th>
<th>Capacity utilization</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>2,083</td>
<td>503,360</td>
<td>17,519,579</td>
<td>128,117</td>
<td>8.1</td>
<td>77.4%</td>
</tr>
<tr>
<td>2009</td>
<td>2,084</td>
<td>503,341</td>
<td>17,817,180</td>
<td>131,227</td>
<td>8.0</td>
<td>77.5%</td>
</tr>
<tr>
<td>2010</td>
<td>2,064</td>
<td>502,749</td>
<td>18,032,903</td>
<td>134,847</td>
<td>7.9</td>
<td>77.4%</td>
</tr>
<tr>
<td>2011</td>
<td>2,045</td>
<td>502,029</td>
<td>18,344,156</td>
<td>139,068</td>
<td>7.7</td>
<td>77.3%</td>
</tr>
<tr>
<td>2012</td>
<td>2,017</td>
<td>501,475</td>
<td>18,620,442</td>
<td>142,874</td>
<td>7.6</td>
<td>77.4%</td>
</tr>
<tr>
<td>2013</td>
<td>1,996</td>
<td>500,671</td>
<td>18,787,168</td>
<td>146,988</td>
<td>7.5</td>
<td>77.3%</td>
</tr>
<tr>
<td>2014</td>
<td>1,980</td>
<td>500,680</td>
<td>19,148,626</td>
<td>150,757</td>
<td>7.4</td>
<td>77.4%</td>
</tr>
</tbody>
</table>
GERMANY'S HEALTHCARE MARKET

<table>
<thead>
<tr>
<th>Year</th>
<th>Hospital Count</th>
<th>Ambulatory Visits</th>
<th>Hospital Occupancy</th>
<th>Annual Change</th>
<th>Change to Previous Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>1,956</td>
<td>499,351</td>
<td>19,239,574</td>
<td>7.3</td>
<td>77.5%</td>
</tr>
<tr>
<td>2016</td>
<td>1,951</td>
<td>498,718</td>
<td>19,532,779</td>
<td>7.3</td>
<td>77.9%</td>
</tr>
<tr>
<td>2017</td>
<td>1,943</td>
<td>497,205</td>
<td>19,455,301</td>
<td>7.3</td>
<td>77.8%</td>
</tr>
</tbody>
</table>

Source: Destatis 2018

The share of privately operated hospitals continues to rise

The Share of Privately Operated Hospitals Continues to Rise

Source: German Hospital Federation 2017
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Market Drivers
Innovation

Dedicated Innovation Clusters are Key to Success

Every year companies participate in thousands of research projects with other partners from industry and scientific institutions, emphasizing Germany’s reputation as a leading environment for healthcare and life sciences. Along the entire value chain – from R&D through scale-up and production to sales and marketing – Germany is known for its outstanding capabilities, resources, and infrastructure.
Germany’s technology clusters provide benefits along the entire value chain

Benefits along the entire value chain

- Education and Training
- Cooperation and Partnering
- R&D Funding
- Labs, Incubators and Shared Facilities
GERMANY’S HEALTHCARE MARKET

Medical Technology Clusters and BioRegions

Germany is home to more than 30 specialized cluster networks focusing on medical technology. Dedicated cluster management teams help obtain funding for joint R&D projects, provide shared facilities, and organize educational training programs for their members.

- More

Germany’s “BioRegions” are regional initiatives for the advancement of modern biotechnology. Over the past three decades, these biotechnology clusters have developed to become Europe’s leading R&D hubs. Each region specializes in particular areas and facilitates collaboration between universities, R&D institutes, and private sector companies.

- More

Business Information

Interested in general guides about the German business location? This section gets you started:

- Investment Guide
- Incentives in Germany
- Investor’s Basics [pdf-download]

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