

THE GERMAN CONSUMER
HEALTHCARE (OTC)
MARKET:
THE „OUT-OF-POCKET“
HEALTHCARE MARKET

21/05/2015

Melanie Wiegand





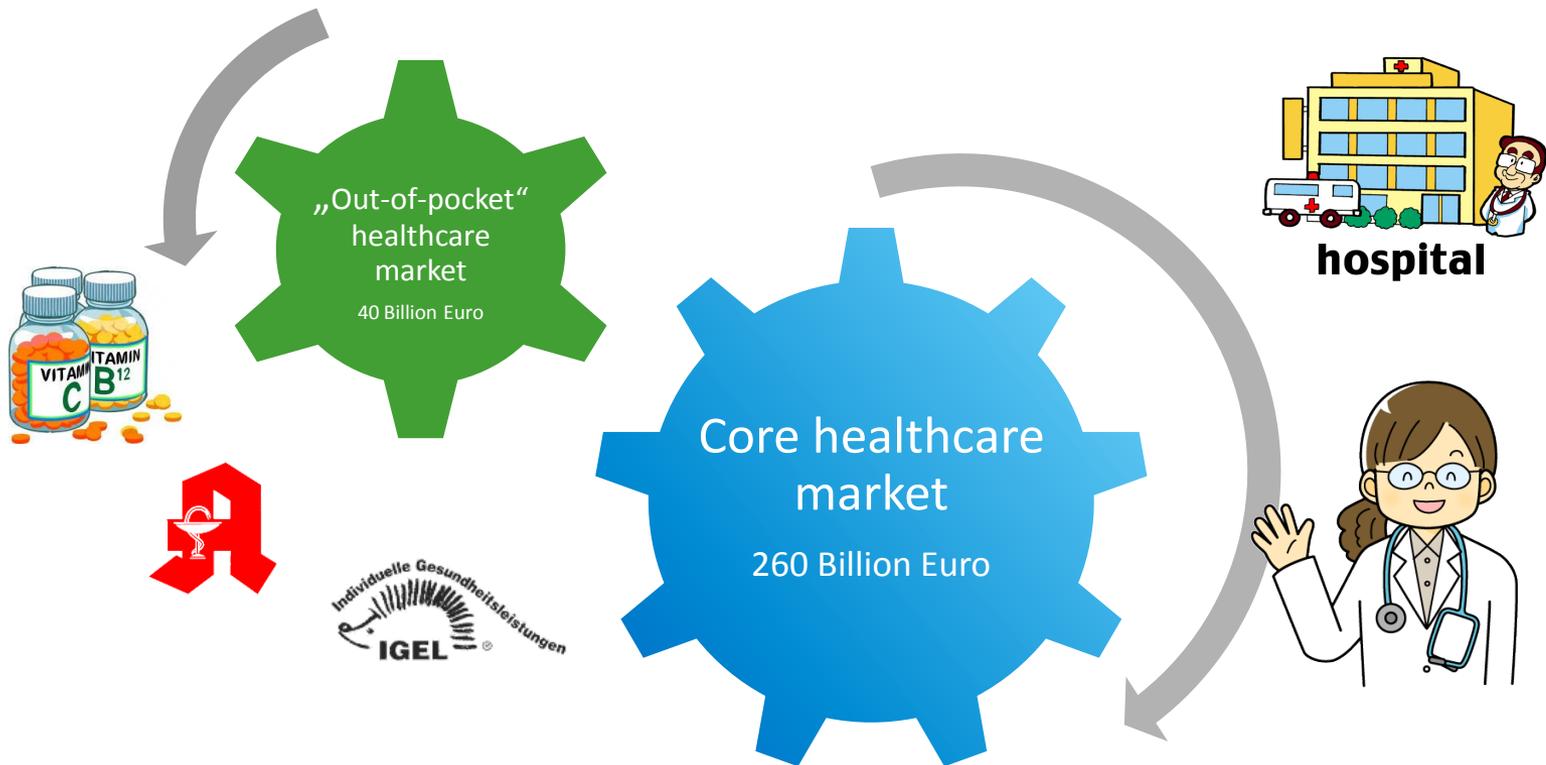
The German Consumer Healthcare Market
21/05/2015

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Agenda

- Healthcare expenditures in Germany
- The “out-of-pocket” healthcare market
- The Generation 50 + - a core target group
- Market opportunities in the healthcare sector

Healthcare Expenditures in Germany



Core Healthcare Market = erster Gesundheitsmarkt
„Out-Of-Pocket“ Healthcare Market = zweiter Gesundheitsmarkt

Household Out-of-Pocket Expenditure on Health

DEFINITION:

“Household out-of-pocket expenditure on health comprise

- cost-sharing,
- self-medication and
- other expenditure

paid **directly** by private households,

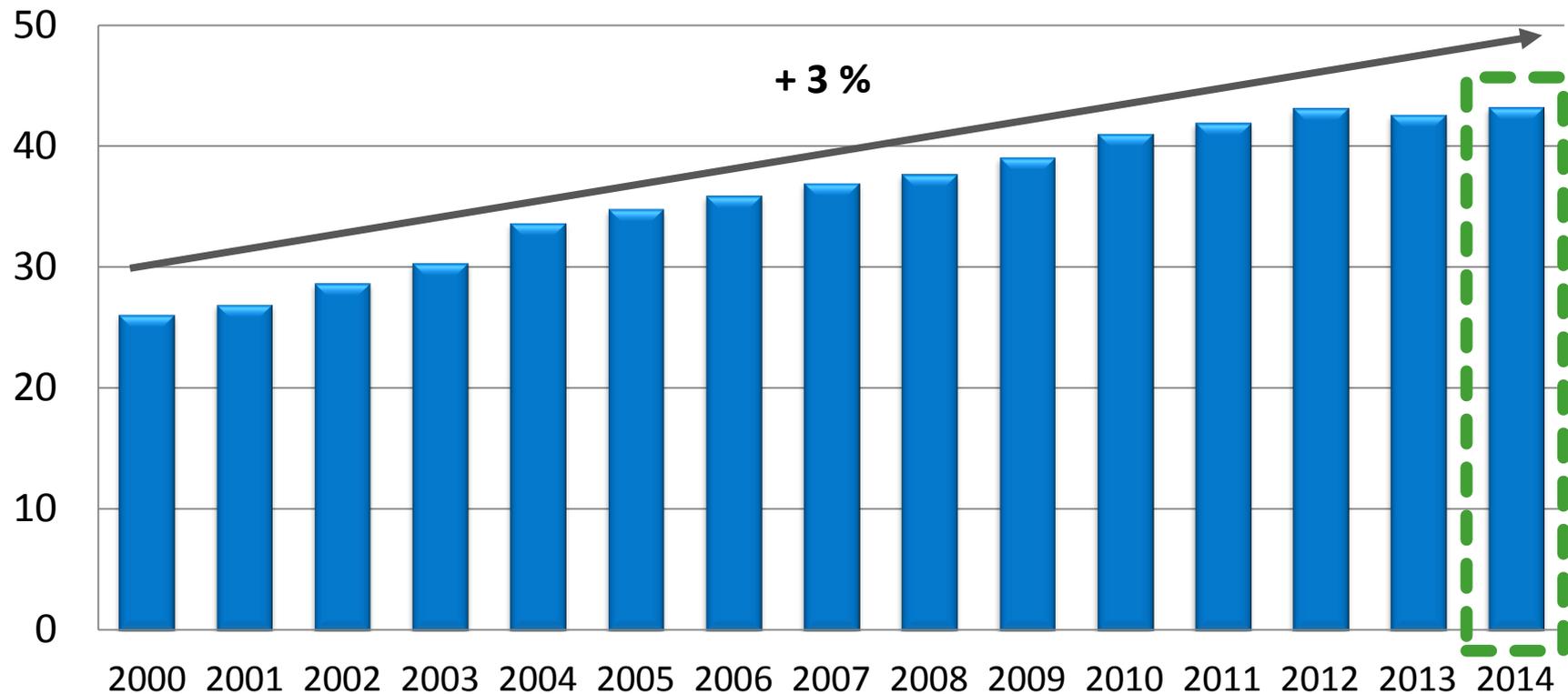
irrespective of whether the contact with the health care system was established on referral or on the patient’s own initiative.”

Self-medication = OTC = non-prescription medication

Out-of-Pocket Expenditures on Health

Increasing healthcare expenditures of private households and non-profit organizations.

Healthcare expenditures in Billion Euro

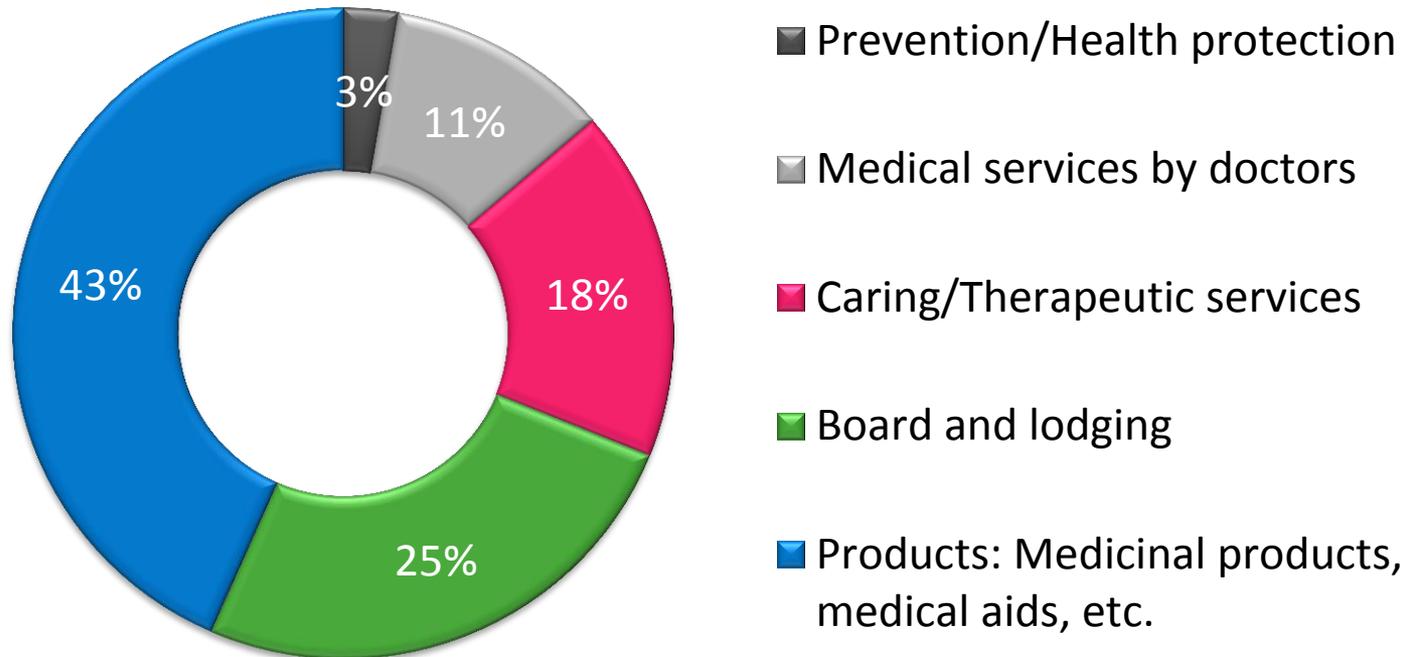


Source: Gesundheitsberichterstattung des Bundes 09.05.2015

Out-of-Pocket Expenditures on Health by Segment

Biggest share of the segment “products” with 43%.

Healthcare expenditures of private households and non-profit organizations (Year 2014)



markets **Germany**

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with German Federal
Minister for
Economic Affairs
and Energy
Sigmar Gabriel

 Wellness

Health 

 Diet

Exercise 

HEALTHY LIVING

Market boost: The out-of-pocket health
phenomenon and its opportunities.

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following the reunification. **p8**

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into a tasty treat. **p24**

Out-of-Pocket Spending on Health per Adult

Out-of-pocket spending per adult:
~ 900 Euro p.a.

Out-of-Pocket Spending on Health per Adult

Willingness to pay out-of-pocket:
+ 27%*

** Repräsentative Studie von Roland Berger im Jahr 2007. Die Befragten waren zwischen 18 und 70 Jahre alt.
Source: Roland Berger, 2007; Bundesministerium für Gesundheit, 2015*

The Generation 50+ - a core Target Group

More than 50% of the consumer spending is generated by the Generation 50+.

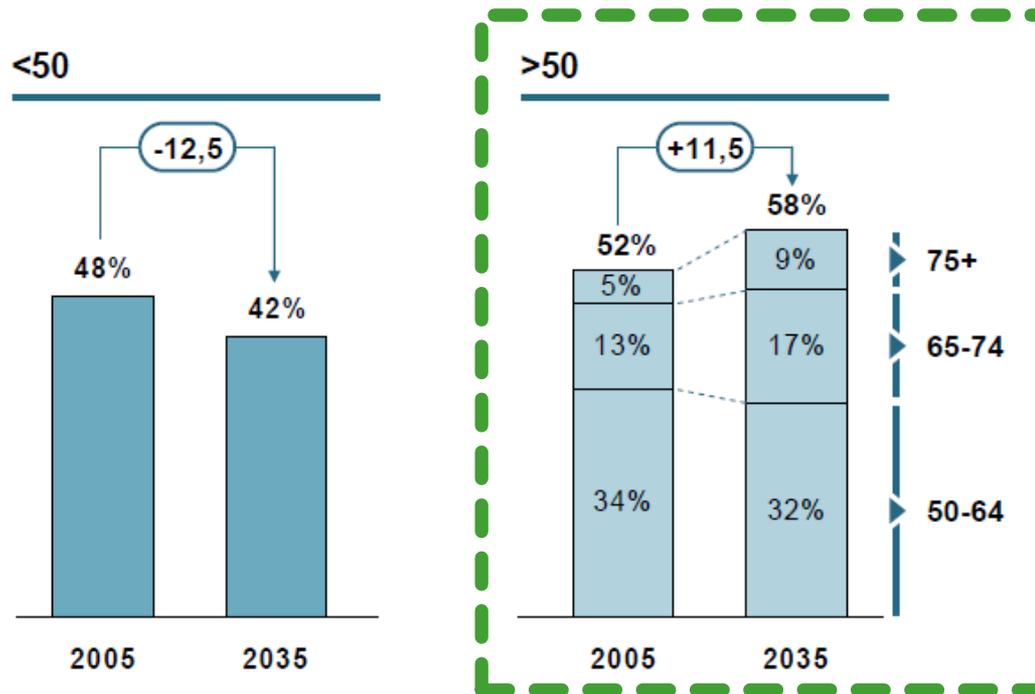


Abbildung C.32: Konsumanteile der unter und über 50-Jährigen in 2005 und 2035 ohne politische Reformen bzgl. Erwerbsbeteiligung, Abgaben und Haushaltspolitik (Basisszenario)

markets Germany

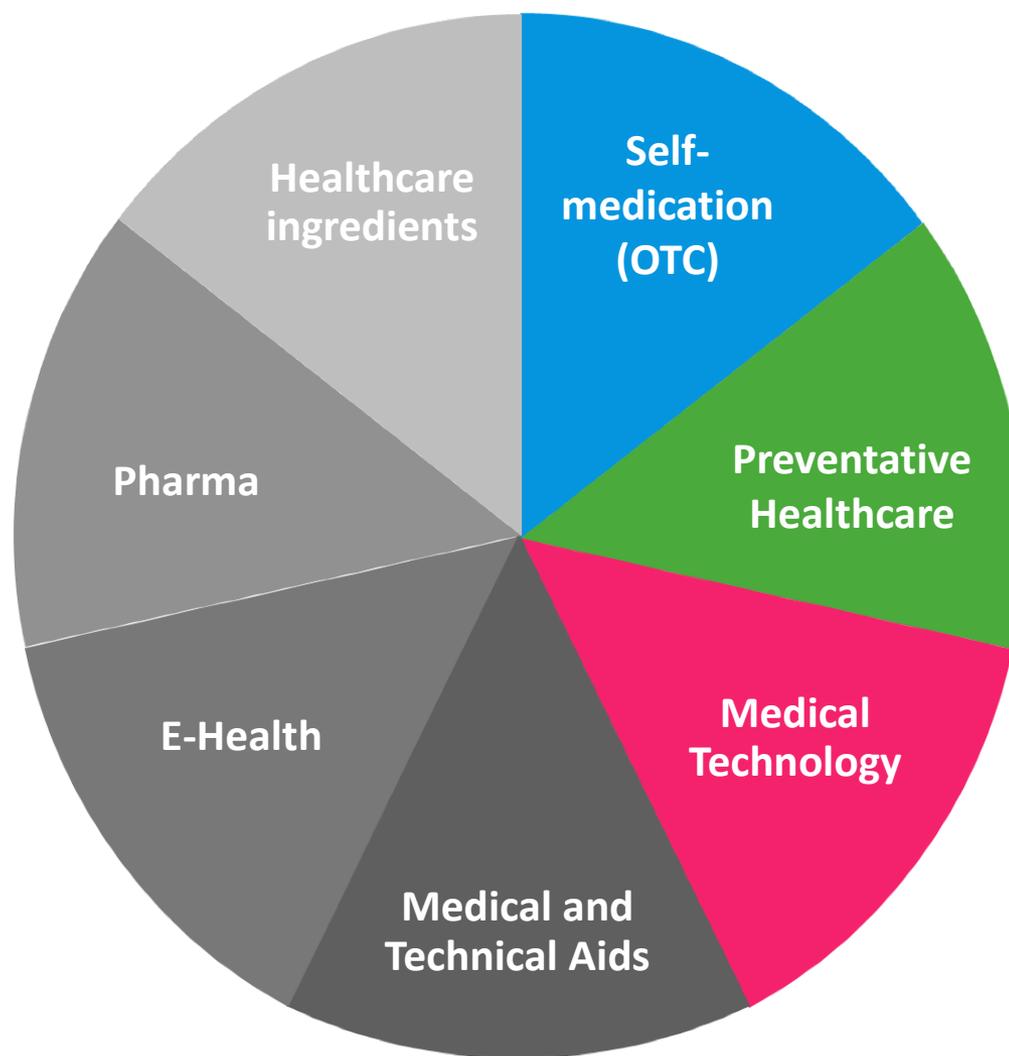
GOLDEN OLDIES

Young-at-heart seniors are opening up a vast new market with great investment potential in Germany. How can you get involved?

-
- On a Health Trip
Medical and health tourism in Germany is booming p10
 - Digital Ad-Ventures
Pop-ups become passé as online marketing goes exponential p14
 - High in Fiber, Low in Weight
Carbon fiber: it's in cars, it's in planes, it's the plastics superman! p16



Market Opportunities in the Healthcare Sector



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