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Succeed in Germany's Healthcare Market: We Can Help

Healthcare Webinar Series 2013/2014

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Director

Germany Trade & Invest

Washington, DC

December 3, 2013



**GERMANY
TRADE & INVEST**

Succeed in Germany's Healthcare Market

April 2, 2014

- *Identify strategies and mechanisms to obtain reimbursements
US Commercial Service and BVMed*

June 2014

- *Explore partnering and funding opportunities in German BioRegions
BioDeutschland, BioRegio, MassBio and BayBio (TBC)*

September 2014

- *Identify partners for research and development
Spectaris, MassMedic and BayBio (TBC)*

November 2014

- *Grow your business in an aging society
US Commercial Service and other partners (TBC)*

I. Germany Trade and Invest: The Agency

II. Germany at a Glance: Basic Facts & the Current Economy

A two-fold mandate: helping German exporters and attracting foreign investors

- *Germany Trade & Invest* is the foreign trade and inward investment promotion agency of the Federal Republic of Germany.
- The agency is promoted and fully funded by the Federal Ministry of Economics and Technology and the Federal Commissioner for the New Federal States.
- *Germany Trade & Invest...*
 - supports German export-oriented companies with comprehensive foreign market information.
 - promotes Germany as a high-performance economic and technology location to attract investors who create/secure jobs in Germany.

Services for our clients

For Companies in Germany (Exporters)

Foreign Country and Market Information

- Macroeconomic analyses and forecasts
- Country and industry analyses (over 125 countries)
- Foreign business and tax law
- Customs and tariffs information
- Practical business tips (e.g. business culture components)
- Business contacts, multipliers

For Companies outside of Germany (Potential Investors)

Information about Germany/ Consulting Services

- Pro-active approach of potential investors
- Identification of growth markets and competitor companies
- Project management support
- Market entry strategy consulting
- Site selection services
- Tax and legal information
- Industry specific information (e.g. Industry Teams)

Germany's innovative potential is driven by four successful segments.



Renewable Energy Team

The markets for renewable energies, closed loop recycling and sustainable water technologies continue to grow rapidly in Germany.



Mechanical & Electronics Team

Mechanical and electronic technologies represent 50% of all exports and more than 34% of all foreign direct investment in Germany.



Service Industries Team

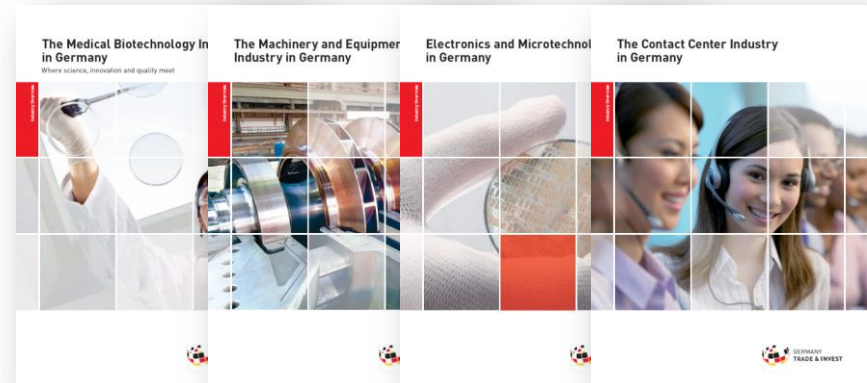
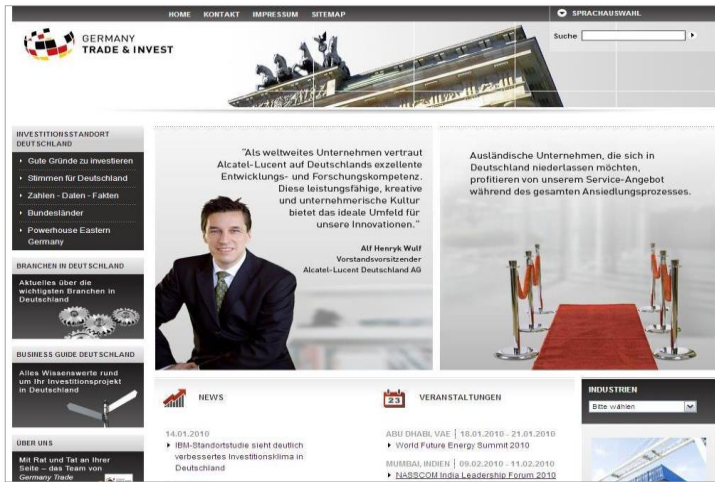
Market size and innovation potential within the German services and consumer goods markets offer vast potential for investors.



Chemicals & Healthcare Team

Germany provides foreign investors with an attractive general framework in the chemical and healthcare industry.

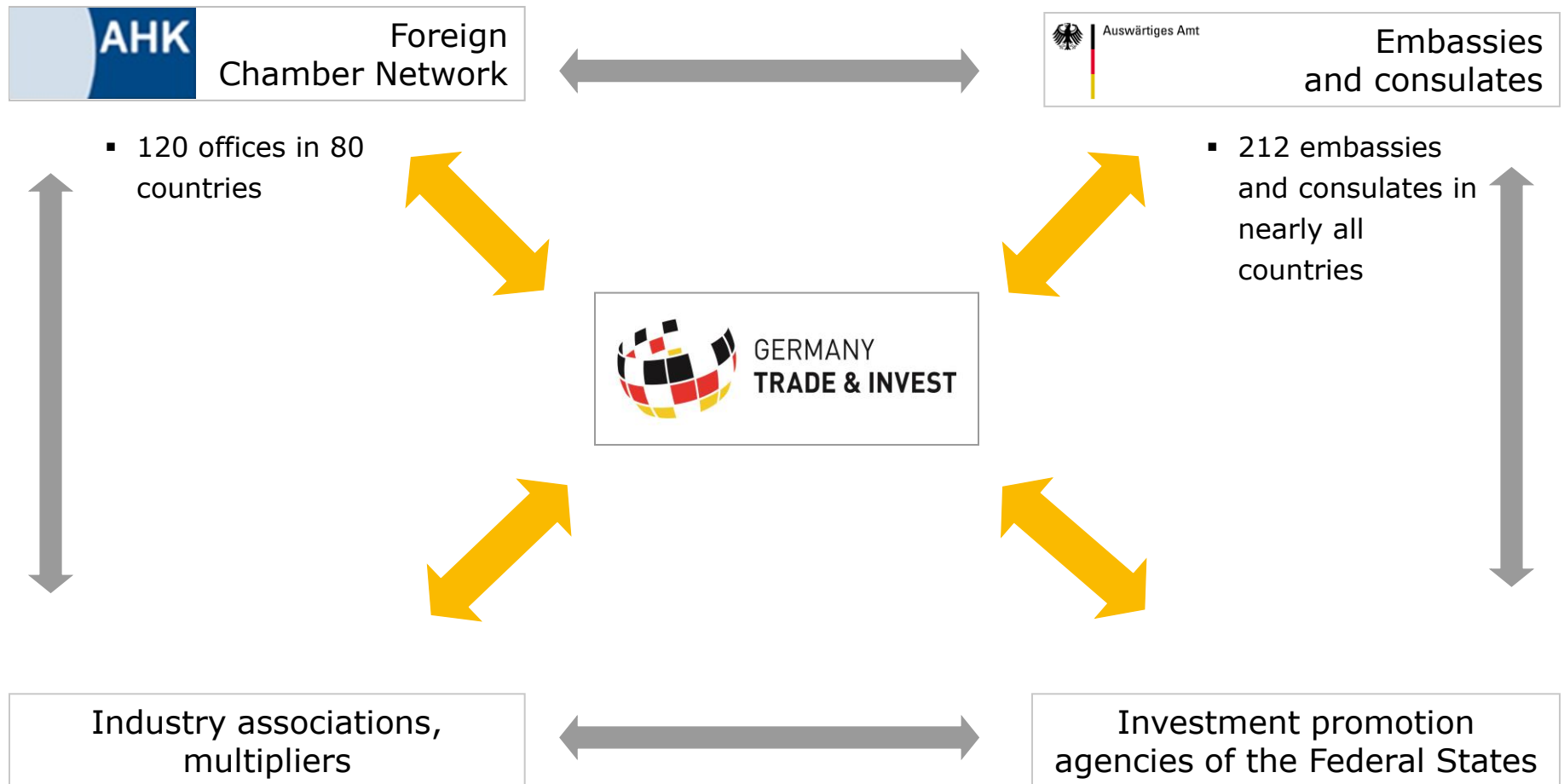
Publications for potential investors



- Information about Germany
- Information about industries
- Publications free of charge
- Industry specific brochures
- Investment Guide to Germany

Please visit us at www.gtai.com or contact one of our US Offices.

Partner organizations of Germany Trade and Invest

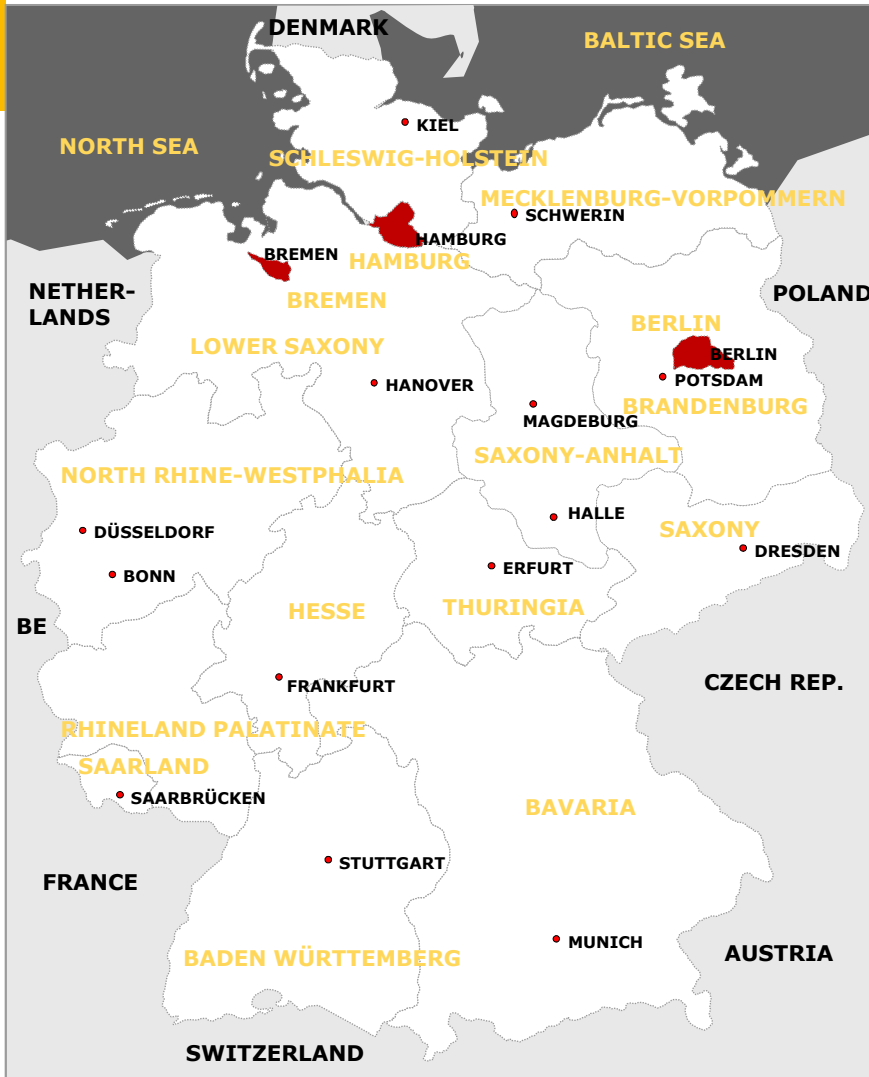


Two Headquarters in Germany - 46 locations worldwide



I. Germany Trade and Invest: The Agency

II. Germany at a Glance: Basic Facts & the Current Economy



- Borders with nine EU member countries
- Population: 82 million, largest in EU 27
- 16 Federal States (Länder):
De-centralized structure with several significant metro regions
- Europe's largest market, largest share of GDP within EU 27
- Social market economy
- SMEs are the backbone of the economy
- High rates of investment in R&D
- Current hot topics: Energy policy (Energiewende), EU crisis, demographic challenges

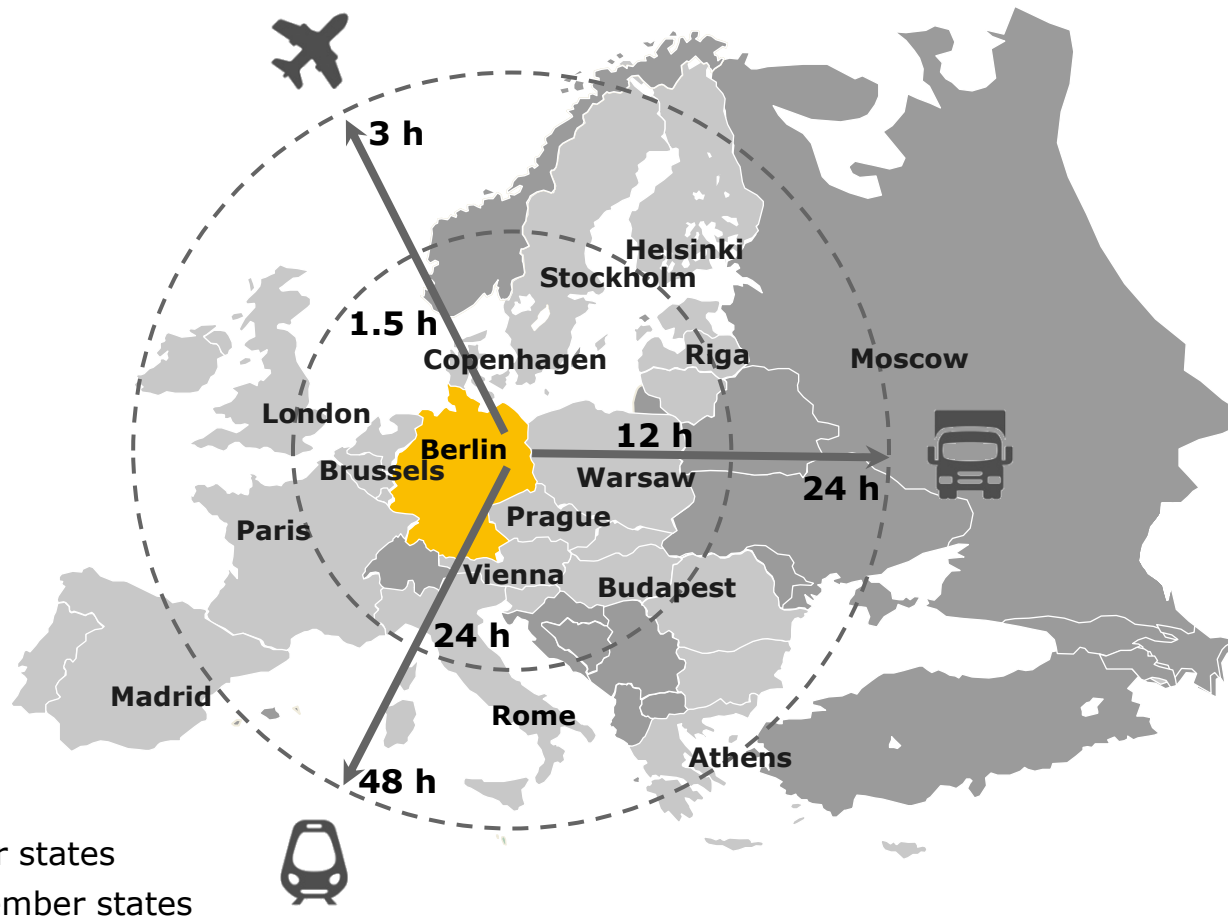
Germany is Europe's largest market.

Share of Total GDP and Population in the European Union (2012)

	GDP (in EUR bn)	Share of total GDP (EU 27)	Population (in m)	Share of total Population (EU27)
Germany	2,593	20%	82	16%
France	1,997	16%	65	13%
UK	1,750	14%	62	12%
Italy	1,580	12%	61	12%
Spain	1,063	8%	46	9%
Netherlands	602	5%	17	3%
Poland	370	3%	38	8%
Sweden	388	3%	9	2%
Czech Republic	156	1%	11	2%
Hungary	100	1%	10	2%
Slovak Republic	69	1%	5	1%
USA	10,830		313	
Japan	4,219		128	
EU 27	12,650		502	
Eurozone	9,421	74%	332	66%

Source: Eurostat 2012, US Census Bureau 2012, Japanese Statistics Bureau 2012;

EU's geographic center is in Germany: Providing rapid and easy access to all European markets.



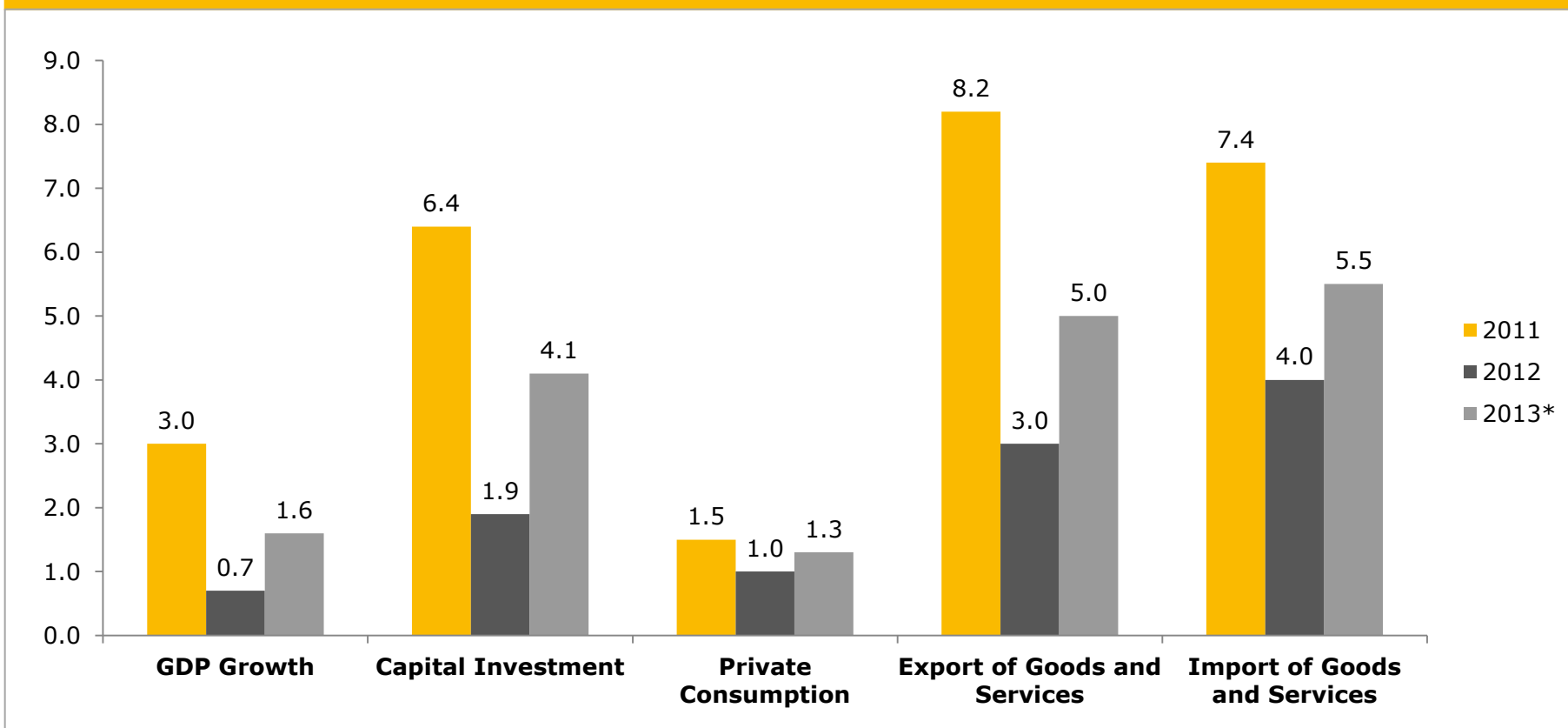
Source: Eurostat 2012

Note: EU-27's center: 42 km east of Frankfurt/Main in Meerholz, Hessen

December 3, 2013

Despite a minor slowdown in 2012, the German government expects 2013 to rival the record year of 2011.

Growth Rates (2011 – 2013, in percent)



Note: *projections by the federal government

Sources: Federal Statistical Office 2012, Federal Government (Annual Economic Report) 2012

German economic strength: The secrets of success

By Richard Anderson
Business reporter, BBC News

A splendid decade

GDP per person

Average annual growth rate, 2001-2010*, %



Unemployment rate

Harmonised definition, latest month, %



General government budget deficit

% of GDP, 2010 estimate



Household debt

% of disposable income, 2009



Sources: IMF; OECD; The Economist poll

The Economist

German business

A machine running smoothly

German companies great and small are making the most of globalisation. Their success owes more to judgment than to luck

Feb 3rd 2011 | BERLIN | from the print edition

Like 387



THE silence is unsettling, as is the sight of half-assembled cars gliding about on robotic transporters that move as if they had minds of their own. The scene of this industrial serenity is Porsche's assembly line in Leipzig. The airy, almost clinical factory provides a good illustration of how, even as its European neighbours and other rich economies splutter fitfully out of recession, Germany has been zooming along the economic autobahn.

The production line that ends in Leipzig spans whole countries. Painted bodies for the Cayenne, a sport-utility vehicle, are brought by train from a factory owned by Volkswagen (with which a merger is pending) in Slovakia. Those for the Panamera, a hatchback, come in from Hanover. The robotic carriers then ferry them from one group of assembly workers to the next. Parts arrive just as they are needed. The system is flexible, allowing two different models to roll off the line in exactly the required numbers. The cars then head east and west to Porsche's two biggest markets, China and America.

Germany's economic model
What Germany offers the world

Independent studies confirm that Germany is Europe's leading economy and most attractive business location.



UNCTAD – World Investment Report 2012:

As FDI flows to Germany increased in 2011, the country is a strong economic foundation for Europe throughout the worsening sovereign debt crisis.



The World Bank's Logistics Performance Index 2012:

Germany ranked in the Top 5 in the World Bank's Logistics Performance Index.



Ernst & Young's 2012 Attractiveness Survey Germany:

Germany is Europe's top business location and number six in the world. Highly rated for workforce skills, infrastructure, and political stability.



AmCham Business Barometer 2012:

Germany ranks as the top business location in Europe for American companies for the third time in a row.

Thank You

Germany Trade & Invest

Foreign Trade and Inward Investment Promotion Agency

Omar Oweiss

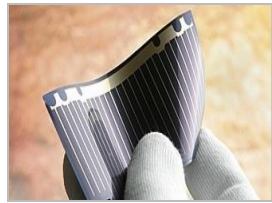
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The market for renewable energies, closed loop recycling and sustainable water technologies continue to grow rapidly in Germany.



Photovoltaics

Germany is the largest PV-market in the world and disposes of one of the most innovative R&D networks.



Energy Efficiency

Germany is one of the leading markets worldwide in the field of energy efficiency.



Wind Energy

Germany by far has the world largest wind industry in the world. The offshore sector offers yet additional and large scale growth opportunities.



Geothermal

The German geothermal market is No. 3 in Europe



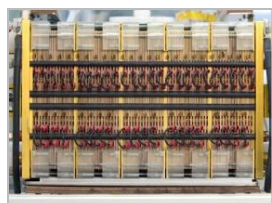
Bioenergy and Ressources

Germany is the leading consumer of bioenergy in Europe.



Solar thermal

Germany is the largest market for solar thermal energy in Europe and the second largest in the World.



Energy Storage and Fuel Cells

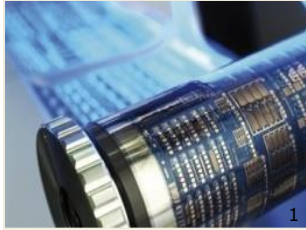
Germany is the No. 1 market for fuel cells in the EU.



Closed Loop Recycling & Sustainable Water Technologies

Germany is leading worldwide in those fields.

Mechanical and electronic technologies represent 50% of all exports and more than 34% of all foreign direct investment in Germany.



Electronics

With a market share of over 35 percent, German semiconductors dominate the European market.



Automotive Industry

Germany offers the biggest market potential and is home to an excellent highly-skilled labor force.



Machinery & Equipment

Germany is the world's leading exporter and reaches a global market share of 19 percent.



Aerospace Industry

With an average growth of 9 percent the German aerospace industry is one of the most dynamic industry sectors.



Maritime Technologies

The German shipbuilding industry has a globally leading technological position and its suppliers are among the world's export champions.

Source: ¹© Fraunhofer Verbund für Mikroelektronik

Market size and innovation potential within the German services and consumer goods markets offer vast potential for investors.



Information & Communications Technology (ICT)

Germany's ICT and E-Commerce industries are market leaders in Europe with sales of EUR 146 billion (ICT) and EUR 438.7 billion (E-Commerce) respectively.



Consumer Goods/Retail

Europe's largest consumer market with more than 82 million consumers and private spending on consumer goods totaling total EUR 363.6 billion.



Business Services

Annual employee growth in Germany's contact center at over 15 percent; over 6,000 service centers with more than 450,000 agents.



Food & Beverages

With an annual turnover of EUR 147 billion, Germany is Europe's largest food and beverage producer. Current growth segments include convenience, organic, and functional food products.



Transportation & Logistics

Annual growth rate of around 8.5 percent with a total turnover of EUR 204 billion in 2007; easy access to all European markets thanks to favorable central location in Europe.



Tourism & Leisure

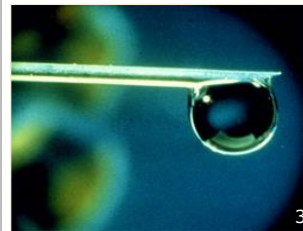
129.9 million tourists traveled to Germany in 2007, with 361.8 million registered overnight stays. The number of overnight stays is increasing steadily.

Germany provides foreign investors with an attractive general framework in the chemical and healthcare industry



Chemical Industry and Polymers

Germany is the biggest market for chemical products in Europe. Investors benefit from a unique chemical park concept with a range of services and professional management.



Red Biotech

With nearly 500 “dedicated” biotechnology firms Germany is home to more biotech companies than any other country in Europe. Between 2000 – 2004, 30% of all worldwide bio patent applications at the Patent office in Munich came from Germany.



Chemicals-Related Process Industry (e.g. paper and glass/ceramic industry)

The paper industry is number one in terms of production in Europe. After the USA, China, Japan and Canada it ranks fifth in the world.



Medical Devices Industry

Germany is the third largest market for medical devices worldwide and leading in Europe. Competitive advantage: decade long experience in the art of engineering, creativity and enthusiasm for innovation.



New Materials/ Composite Materials

Composite materials and composite material systems have gained in importance. There is an increasing demand for light, low-abrasive and temperature-resistant polymers, metals and ceramics.



Pharmaceuticals Industry

Germany is Europe’s largest single market for pharmaceuticals. The market is attractive due to Germany’s stable and broad health system. Furthermore, Germany is open to both innovation and low-priced providers.