

MEDICA 2019

# SUCCEED IN GERMANY'S MEDICAL AIDS MARKET

**MARKET TRENDS AND ACCESS**

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# Succeed in Germany's Medical Aids Market

## Agenda

1. Market Trends  
Julia Albrecht | Manager Healthcare | GTAI
2. Market Access  
Maria Heil | M.C.L. Lawyer & Founding Partner | NOVACOS
3. Success Story  
Omer Elad | Central Europe Regional Director | OrCam Technologies Ltd.

# ABOUT US



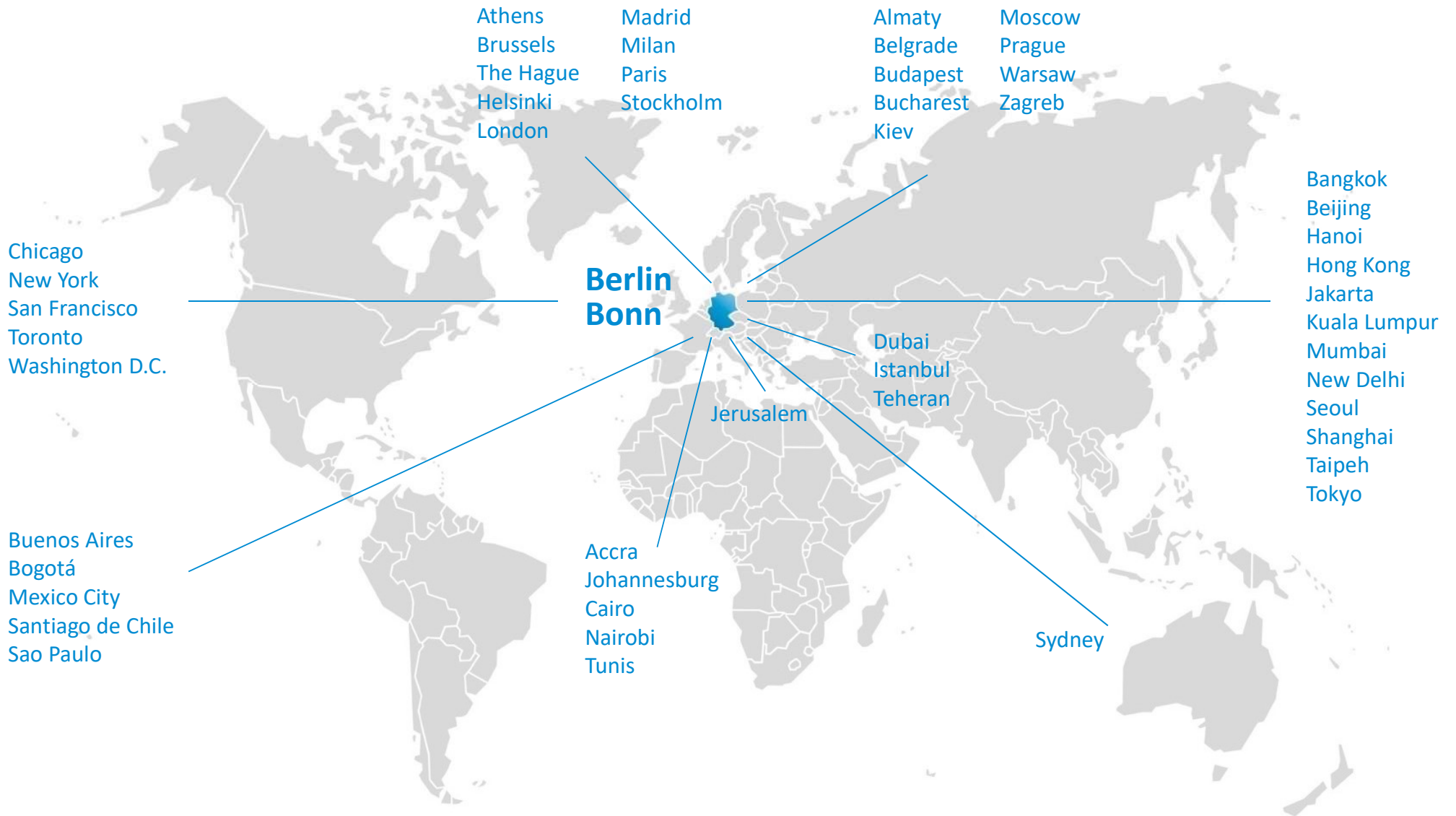


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Federal Ministry  
for Economic Affairs  
and Energy







**Export  
Promotion**



**Investor  
Consulting**



# Investor Consulting

- Information about key industries
- Legal information
- Tax information
- Incentives and financing information
- Introduction to local partners
- Site selection support





# MARKET TRENDS



# The German Healthcare Market

One of Germany's largest growth markets at a glance

**83 million**  
inhabitants

**EUR 387 billion**  
healthcare  
expenditure

**11.6%**  
of GDP

**4%**  
annual growth

**7.3 million**  
employees in the  
healthcare  
industry

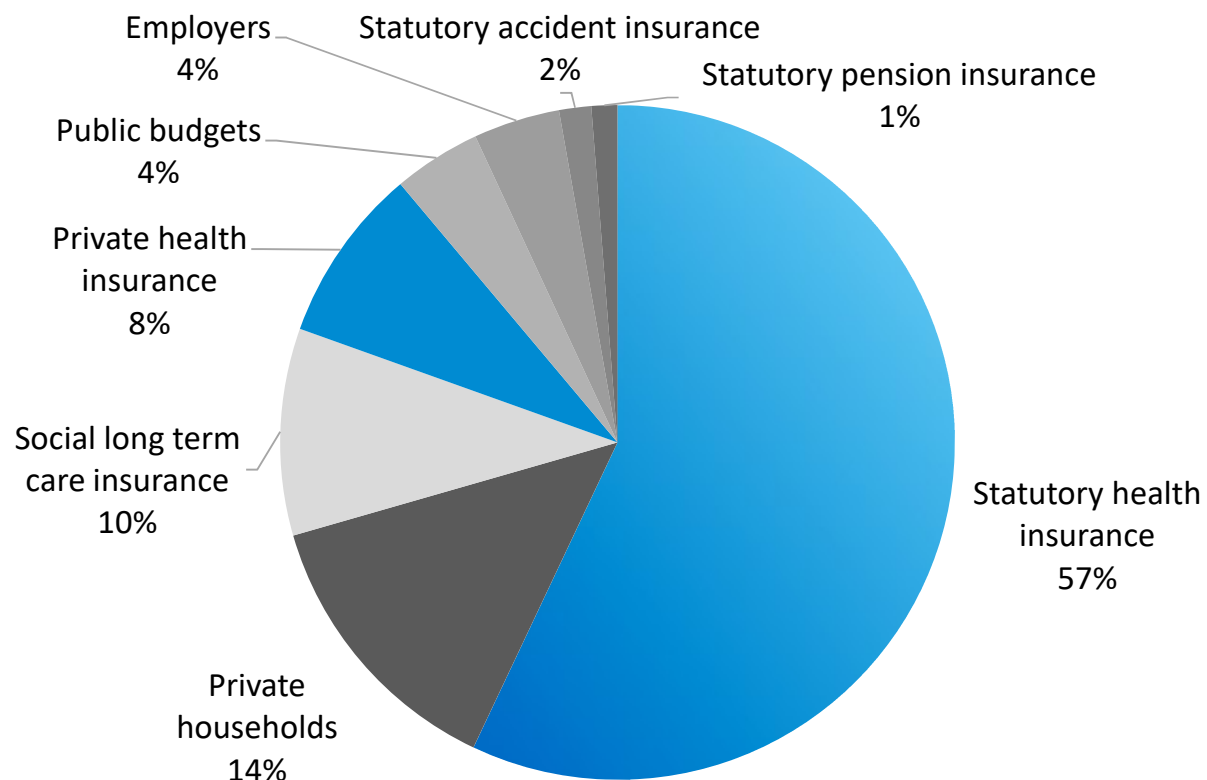
**1,942** hospitals  
**500,000** beds

**385,000**  
physicians

**19,400**  
pharmacies

*Source: German Federal Statistical Office 2019, Pharmazeutische Zeitung 2019, Federal Ministry of Health 2019, ABDA 2019*

# The German Healthcare Market



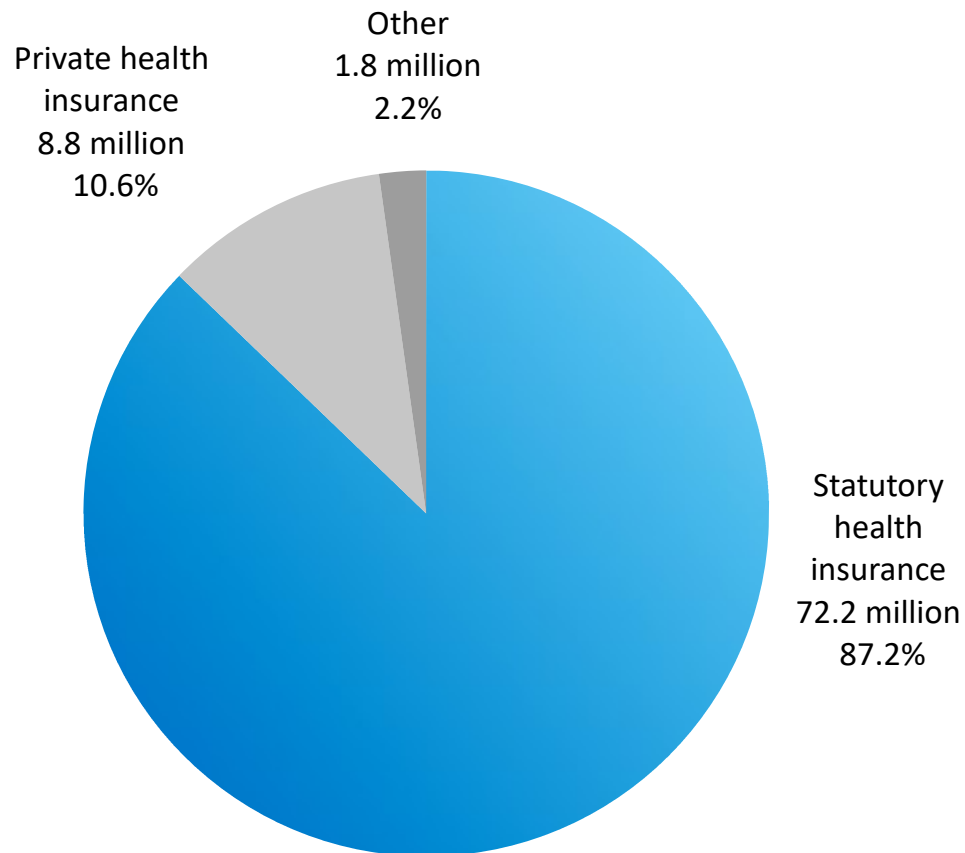
Sources of financing  
covering health  
expenditure 2017

*Note: The item private households includes non-profit institutions serving households.*

*Source: German Federal Statistical Office 2019*



# Mandatory Health Insurance

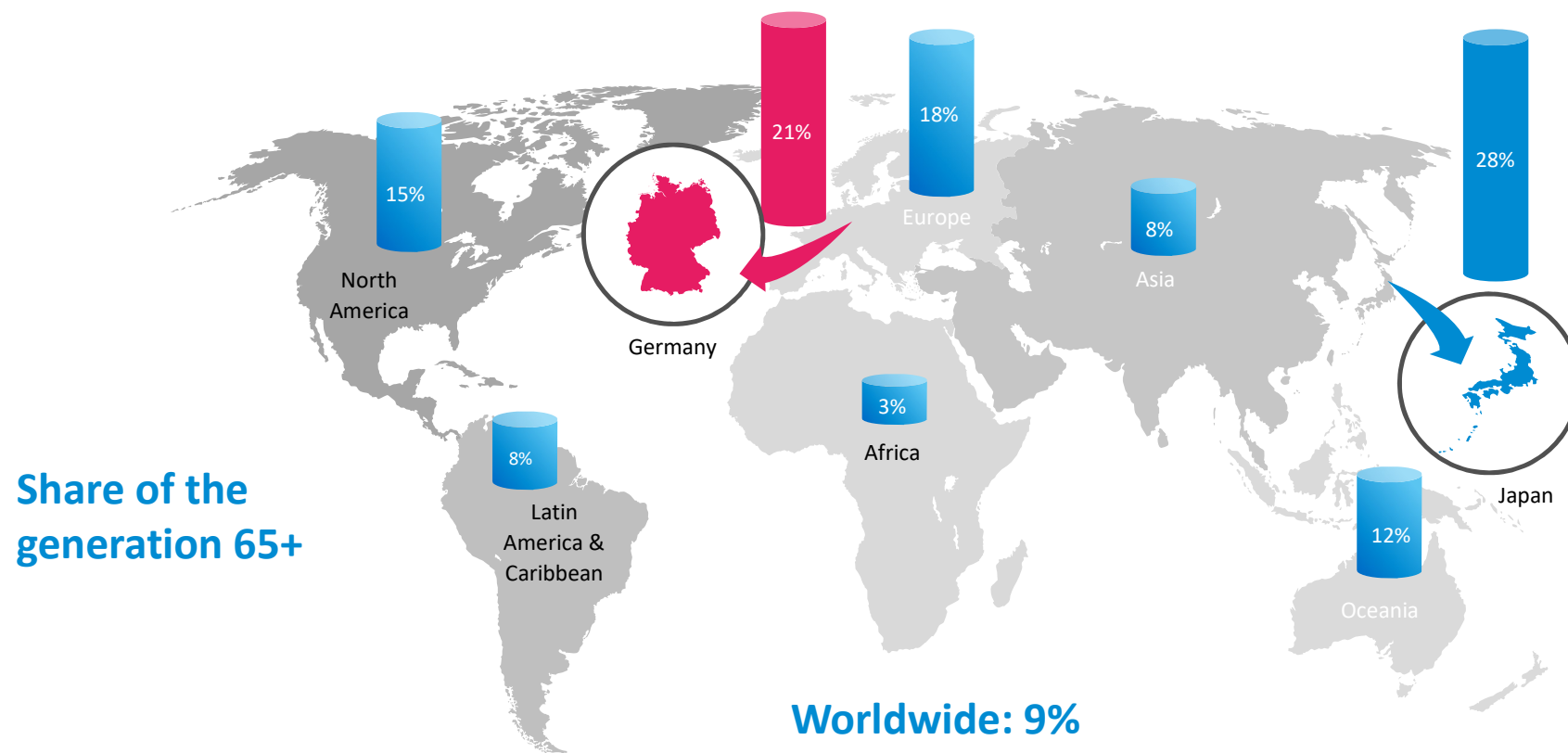


**Types of health insurance in Germany and number of members 2018**

44 private and 109 public health insurance companies in 2019

# Demographic Change

The German population is one of the “oldest” worldwide

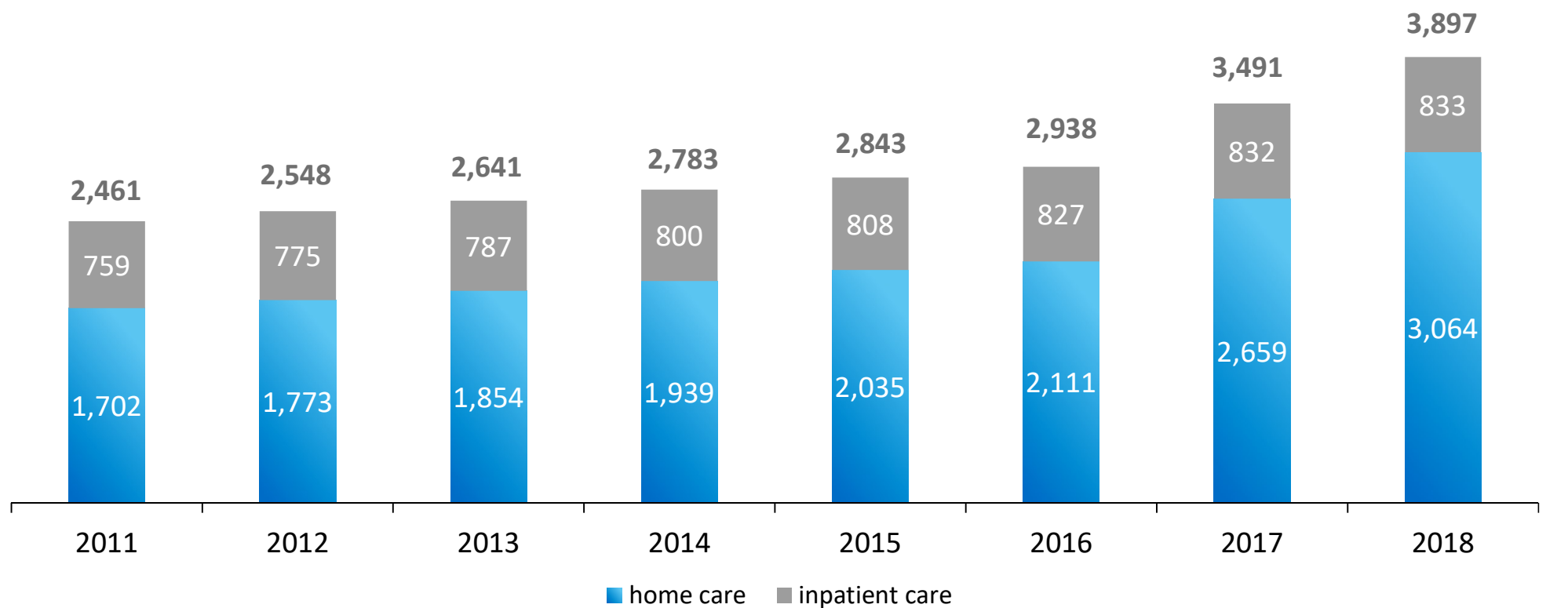


Source: German Foundation for World Population (DSW) 2018, Population Reference Bureau 2018



# Care Recipients in Germany

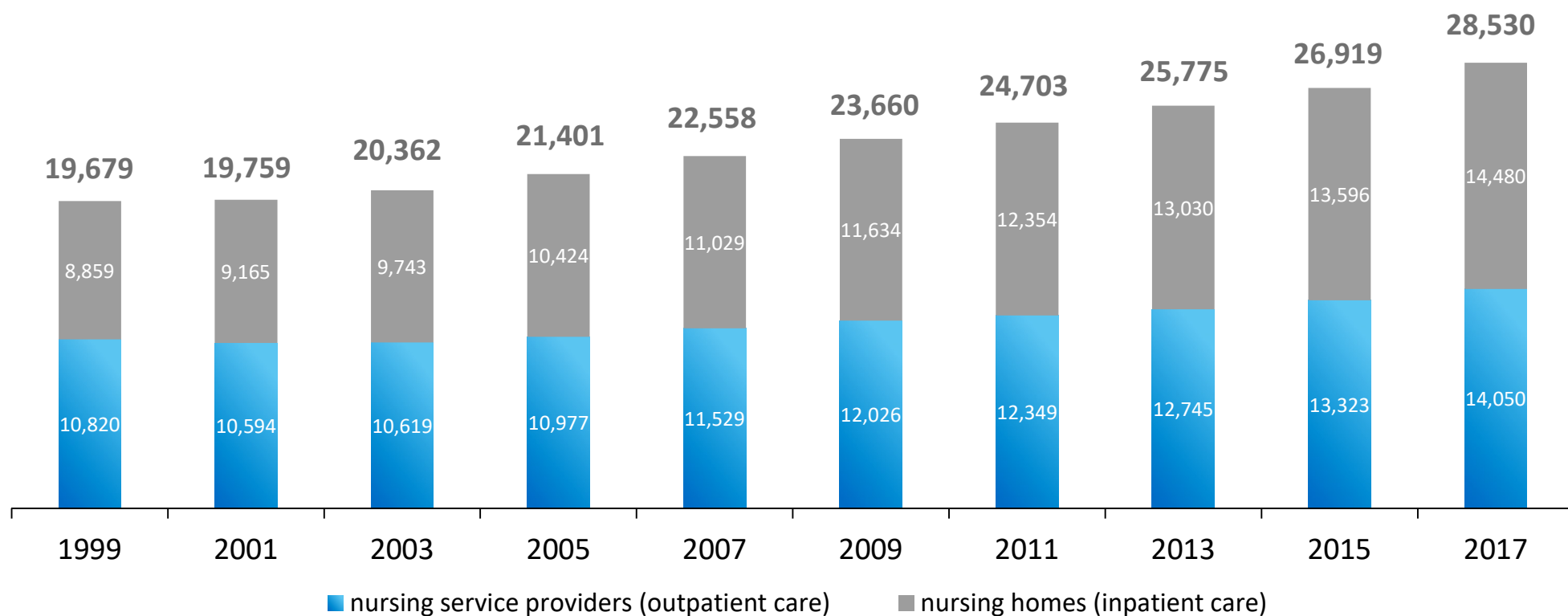
Number of care recipients in Germany 2011 – 2018 (in thousands)



Source: German Federal Ministry of Health 2019

# Nursing Homes & Service Providers

Number of nursing service providers and nursing homes in Germany 1999 - 2017



Source: German Federal Statistical Office 2019



# The German Medical Aids Market

A wide range of assistive devices and mobility equipment



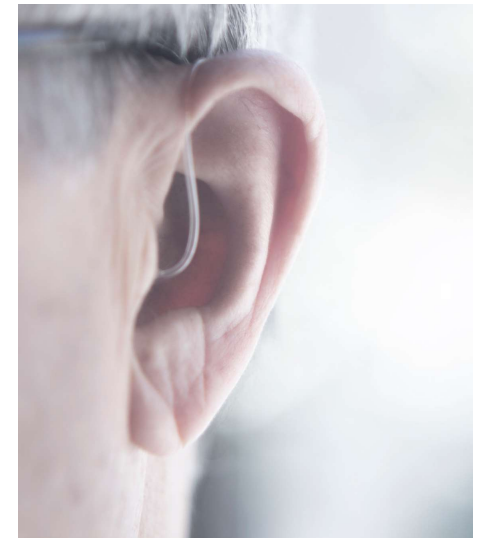
**Prostheses and  
Orthoses**



**Walking Aids and  
Wheelchairs**



**Visual Aids**



**Hearing Aids**

*Note: The listed product categories are only examples.*



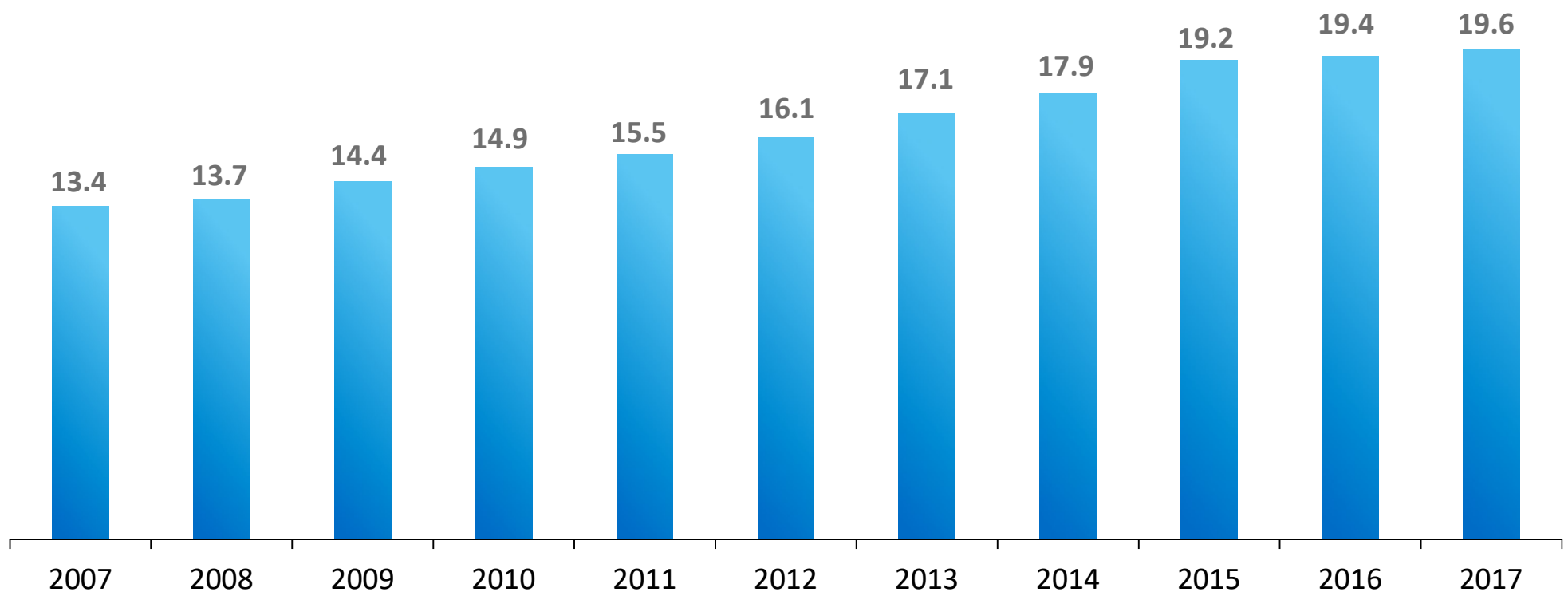
# The German Medical Aids Market

Purpose of medical aids („Hilfsmittel“)

- Successful treatment of a disease
- Prevent an imminent disability
- Balancing an existing disability of an individual

# The German Medical Aids Market

Market volume of medical aids in Germany 2007 – 2017 (in EUR billion)



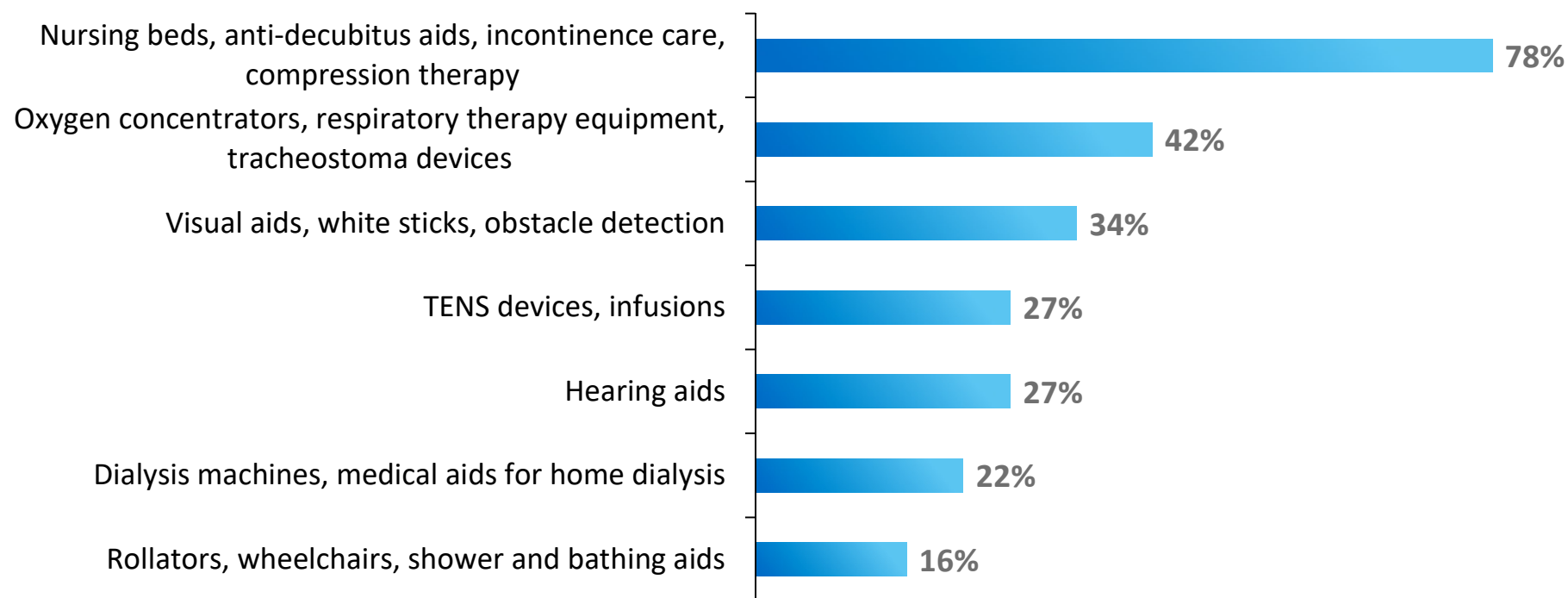
Source: German Federal Statistical Office 2019

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# The German Medical Aids Market

## Expected growth rates of selected segments in the German market 2007 – 2050



*Note: The growth rates refer to the expected increase in demand based on the units sold, not on the sales volume.*

*Source: German Federal Statistical Office 2019 / Spectaris 2012*

# Market Access for Medical Aids

The CE mark is an important prerequisite for market entry

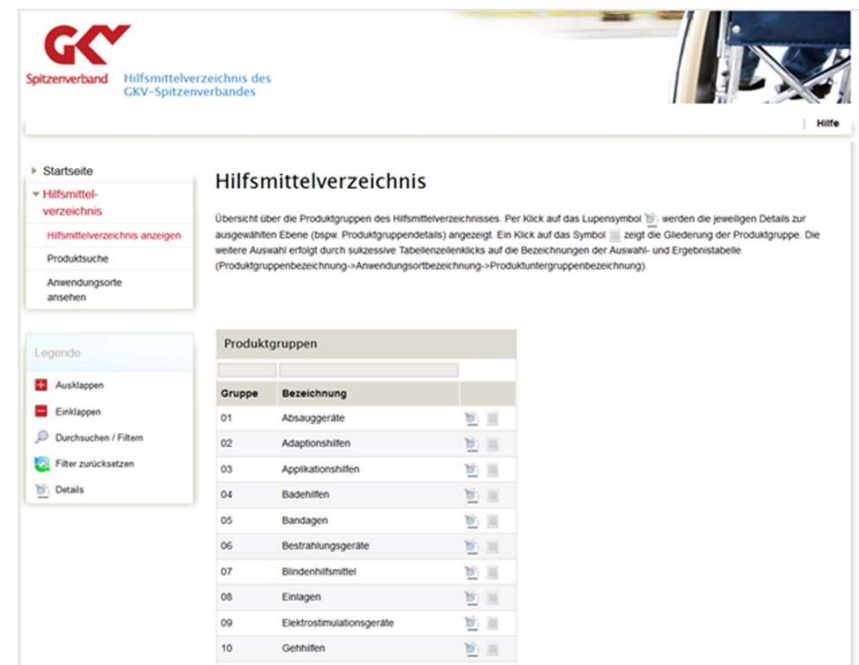
## 1. Regulatory Framework

EU Level  
CE Certification



## 2. Reimbursement

National Level  
(e.g. Germany)



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SUPPORTED BY THE FEDERAL MINISTRY FOR ECONOMIC AFFAIRS AND ENERGY  
ON THE BASIS OF A DECISION BY THE GERMAN BUNDESTAG.

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