

GERMANY'S HEALTHCARE MARKET

NOVEMBER 2020

Dr. Marcus C. Schmidt
Director Chemicals & Healthcare

www.gtai.com



A large group of people, mostly in business attire, are posed for a group photo in a modern, spacious hall. The hall features a high ceiling with a complex glass and steel dome structure. Large, white, wing-like sculptures are suspended from the ceiling. The floor is covered with a red carpet. In the background, a large screen displays the text "GTAI-KONGRESS 2019". The overall atmosphere is professional and formal.

**Germany Trade & Invest (GTAI) is the
economic development agency of the
Federal Republic of Germany.**



***Export
Promotion***



***Investor
Consulting***



***Location
Marketing***



***New Federal
States & Structural
Transformation***

Healthcare Market Germany

**€ 400
billion**
healthcare
expenditure

11.7%
of GDP

**73
million**
people have
public health
insurance

9 million
people
privately
insured

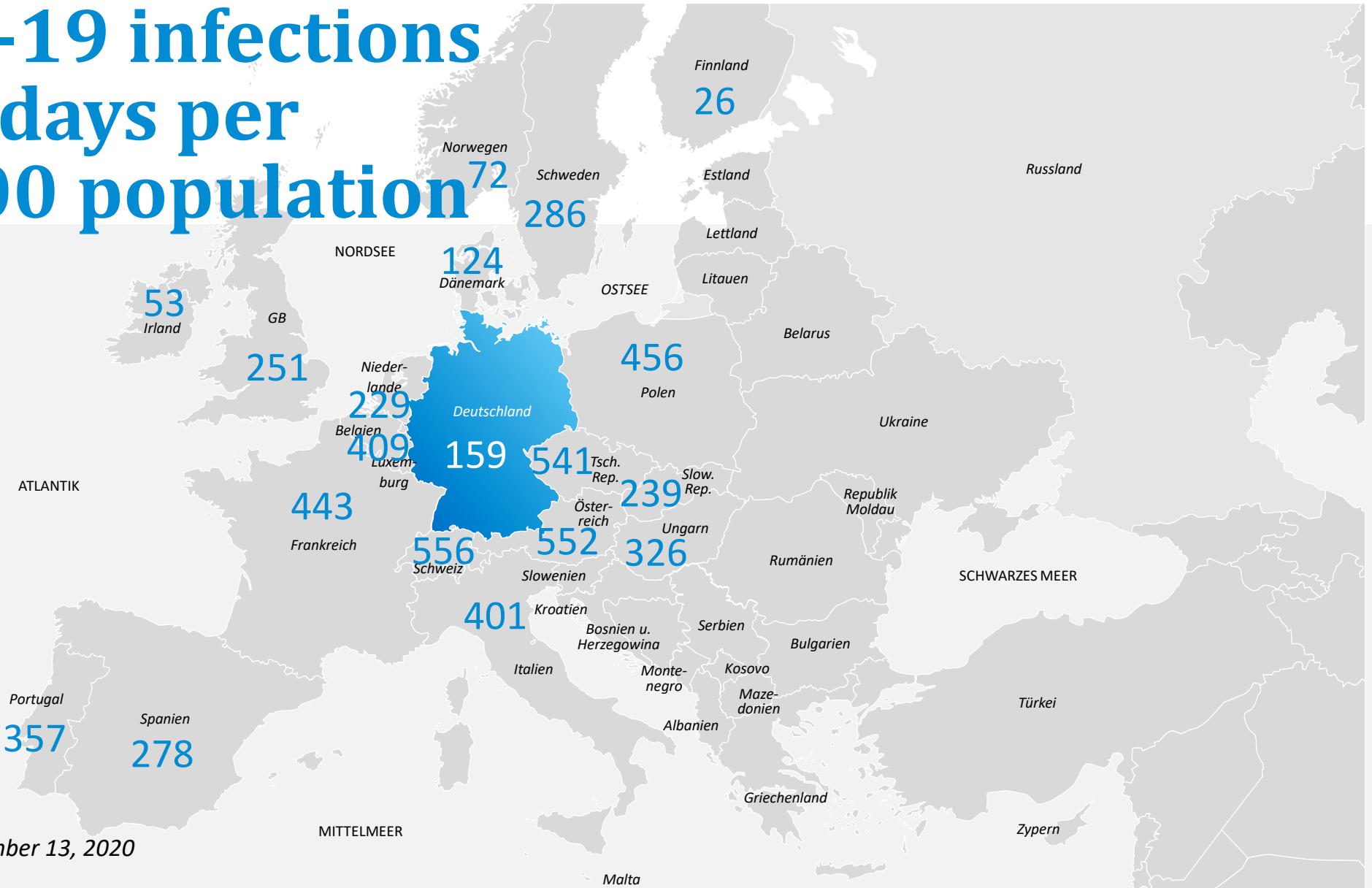
1925
hospitals
500k
beds

385,000
physicians

20,000
pharmacies

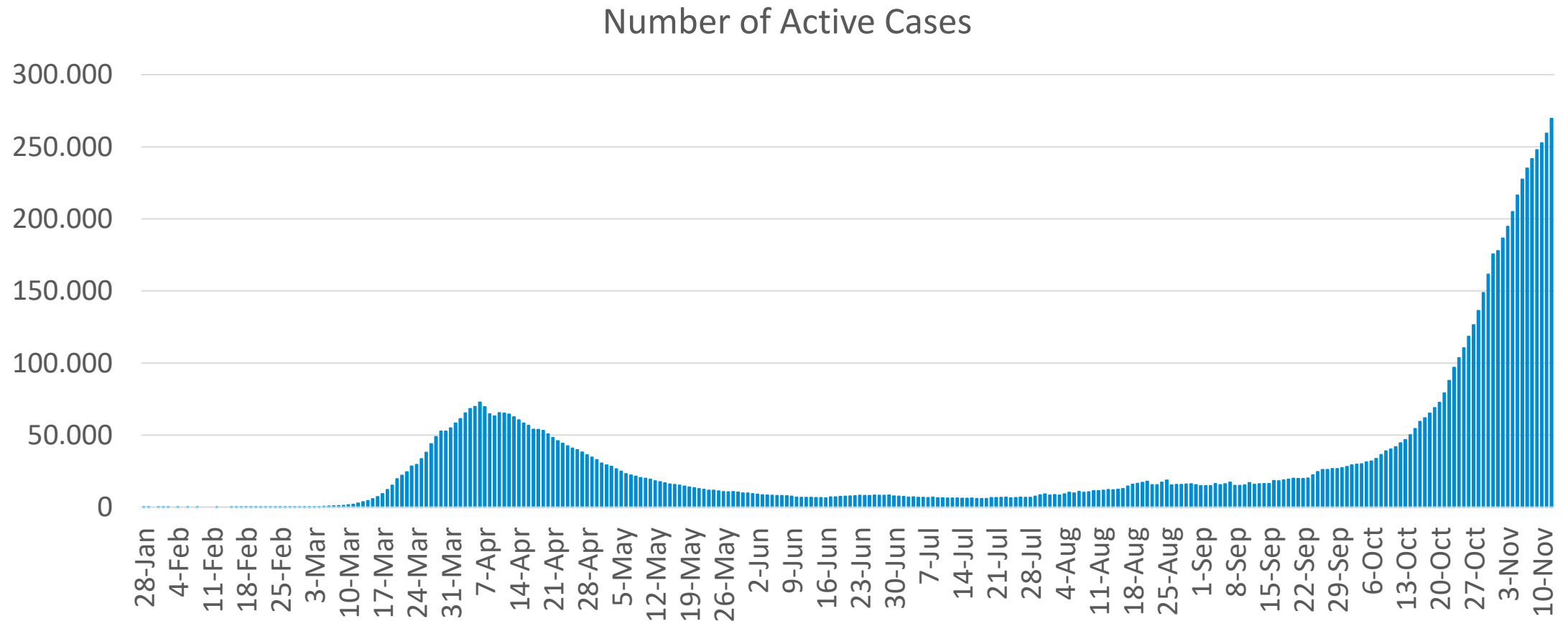
**7.5
million**
employment in
healthcare

COVID-19 infections past 7 days per 100.000 population



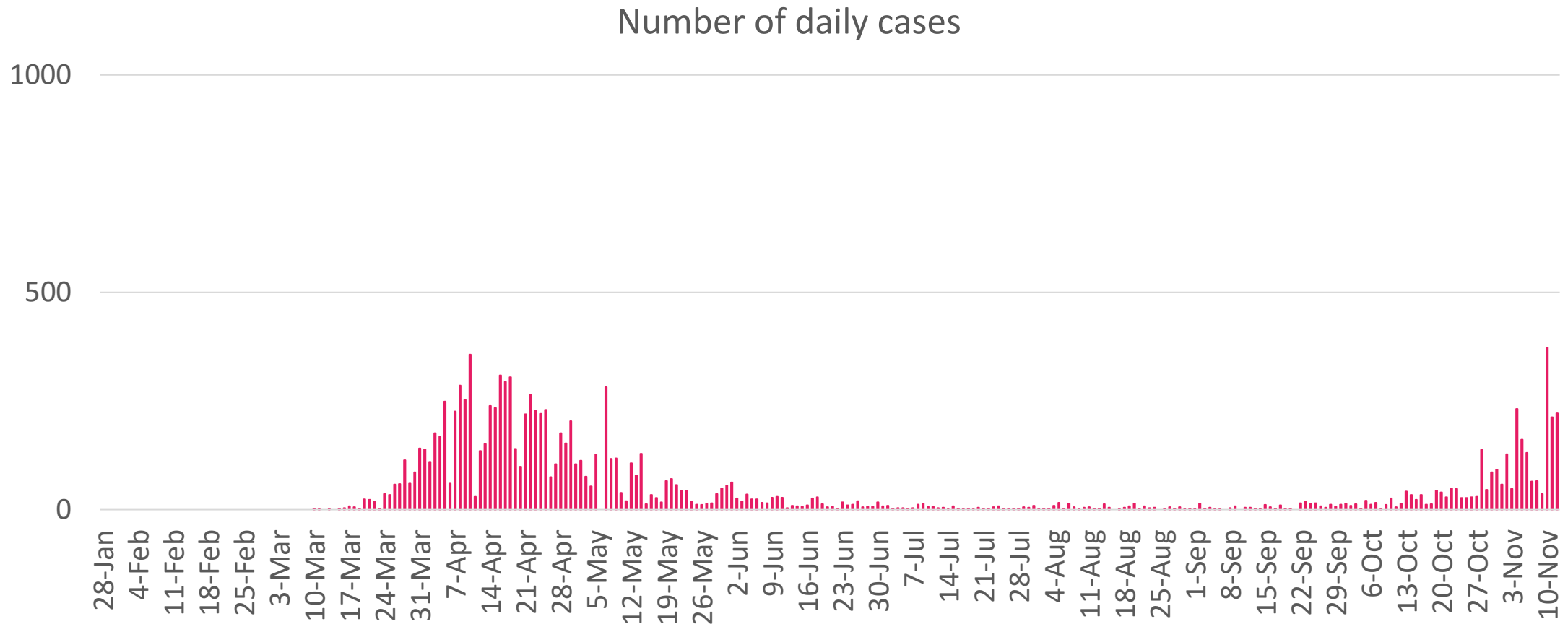
Source: statista, November 13, 2020

COVID-19 infections in Germany



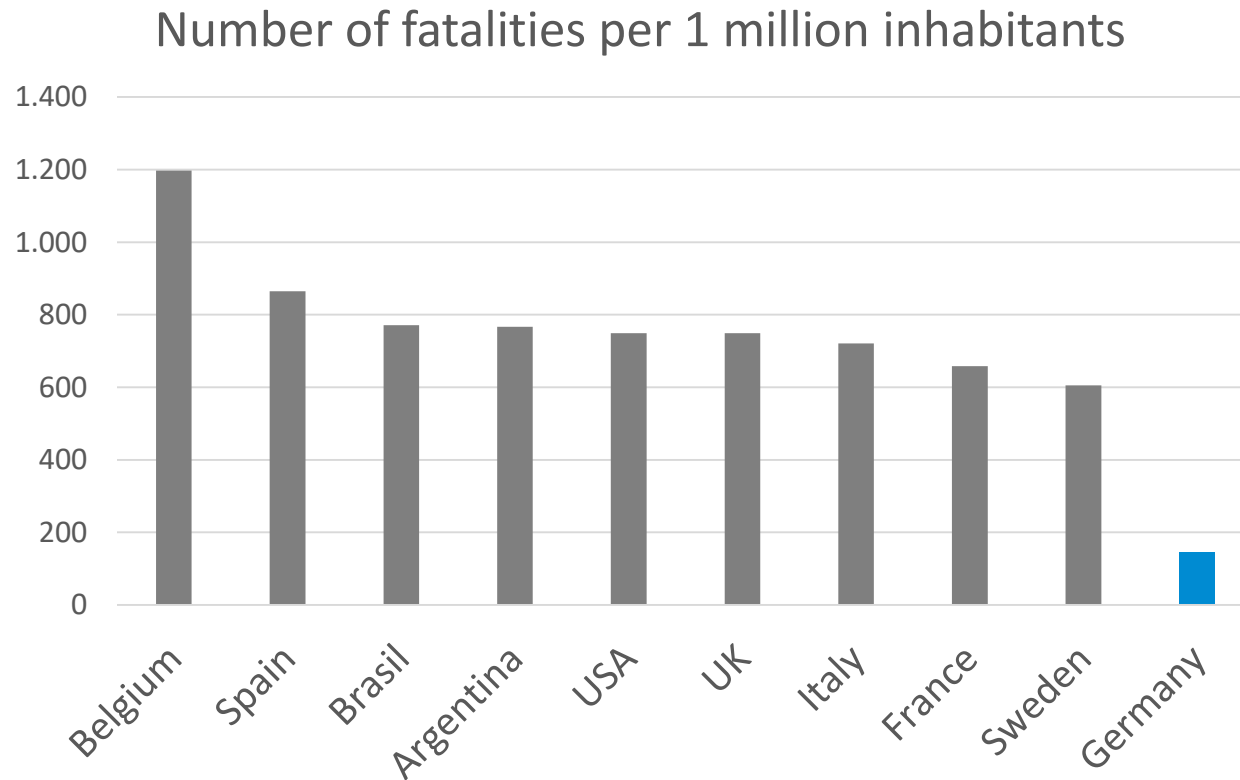
Source: statista, November 13, 2020

Daily COVID-19 fatalities in Germany



Source: statista, November 13, 2020

Number of COVID-19 related deaths in selected countries

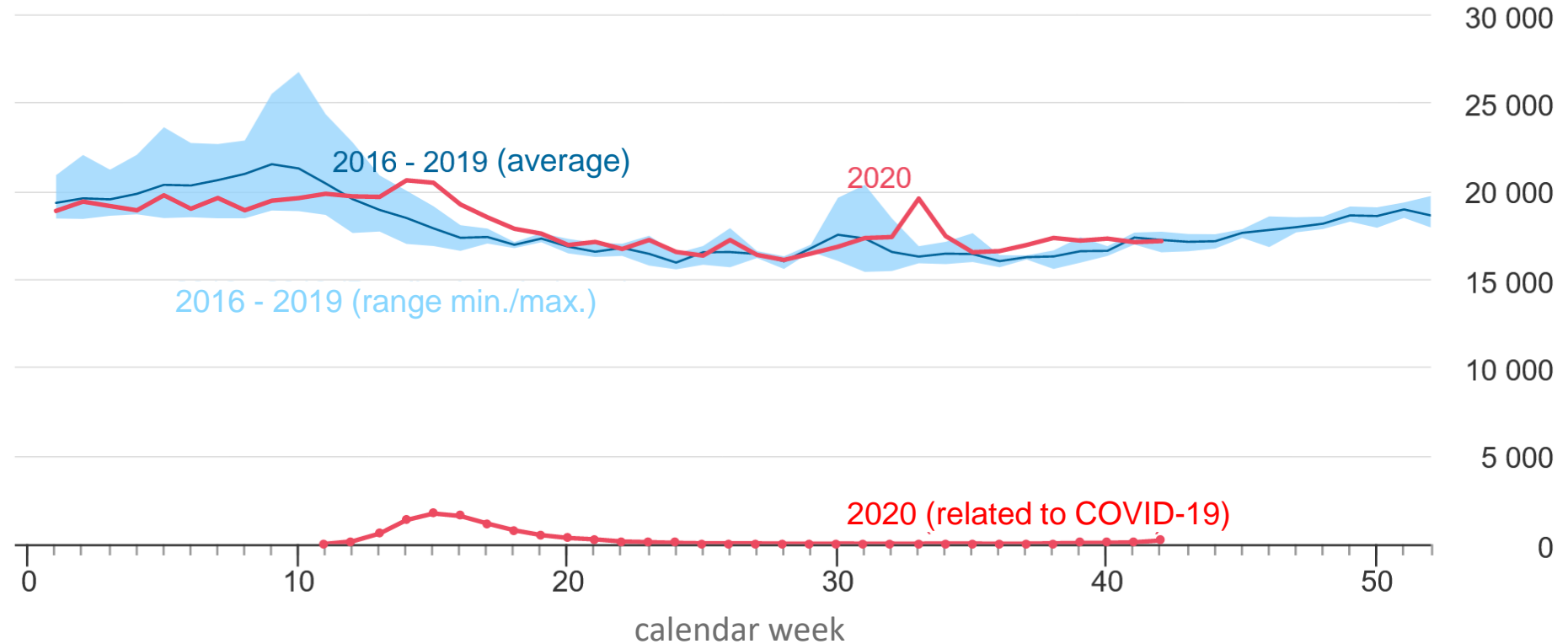


About 12,000 deaths related to Covid-19 have been recorded in Germany.

Still, the country was not affected as severely as other countries.

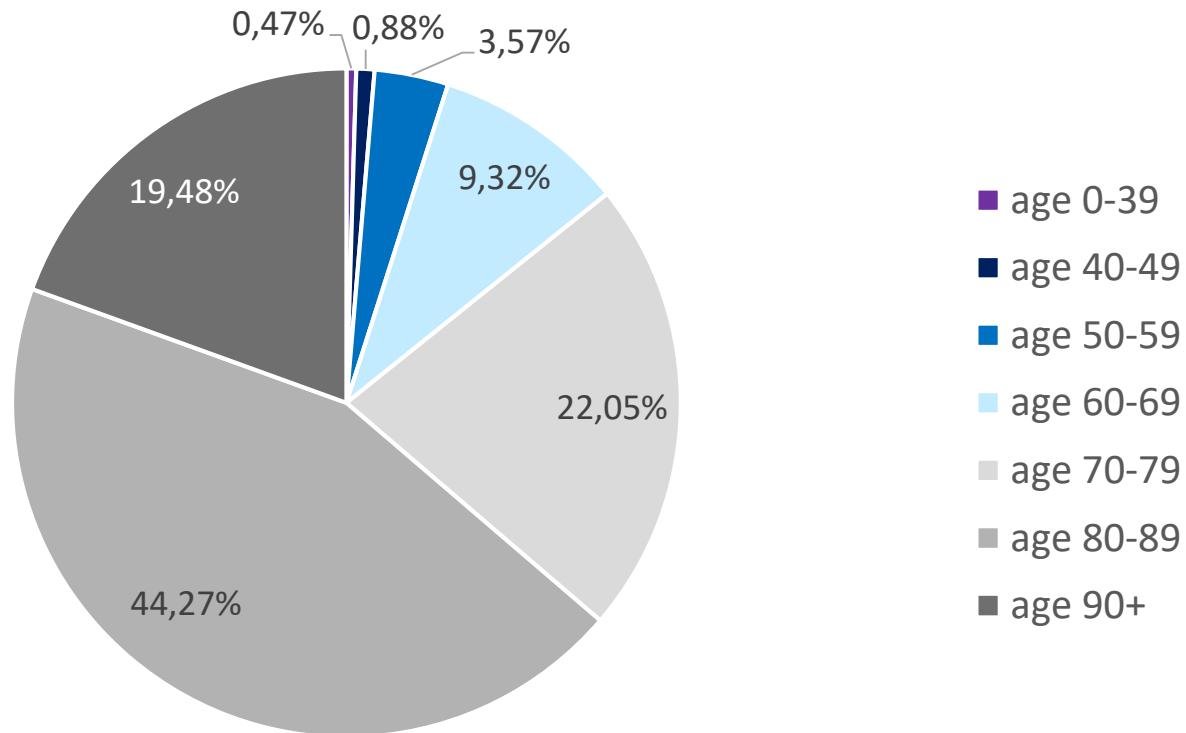
Recorded deaths in Germany in 2020

Weekly fatalities in Germany



Quellen: Sterbefallzahlen insgesamt: Statistisches Bundesamt, COVID-19-Todesfälle: Robert Koch-Institut

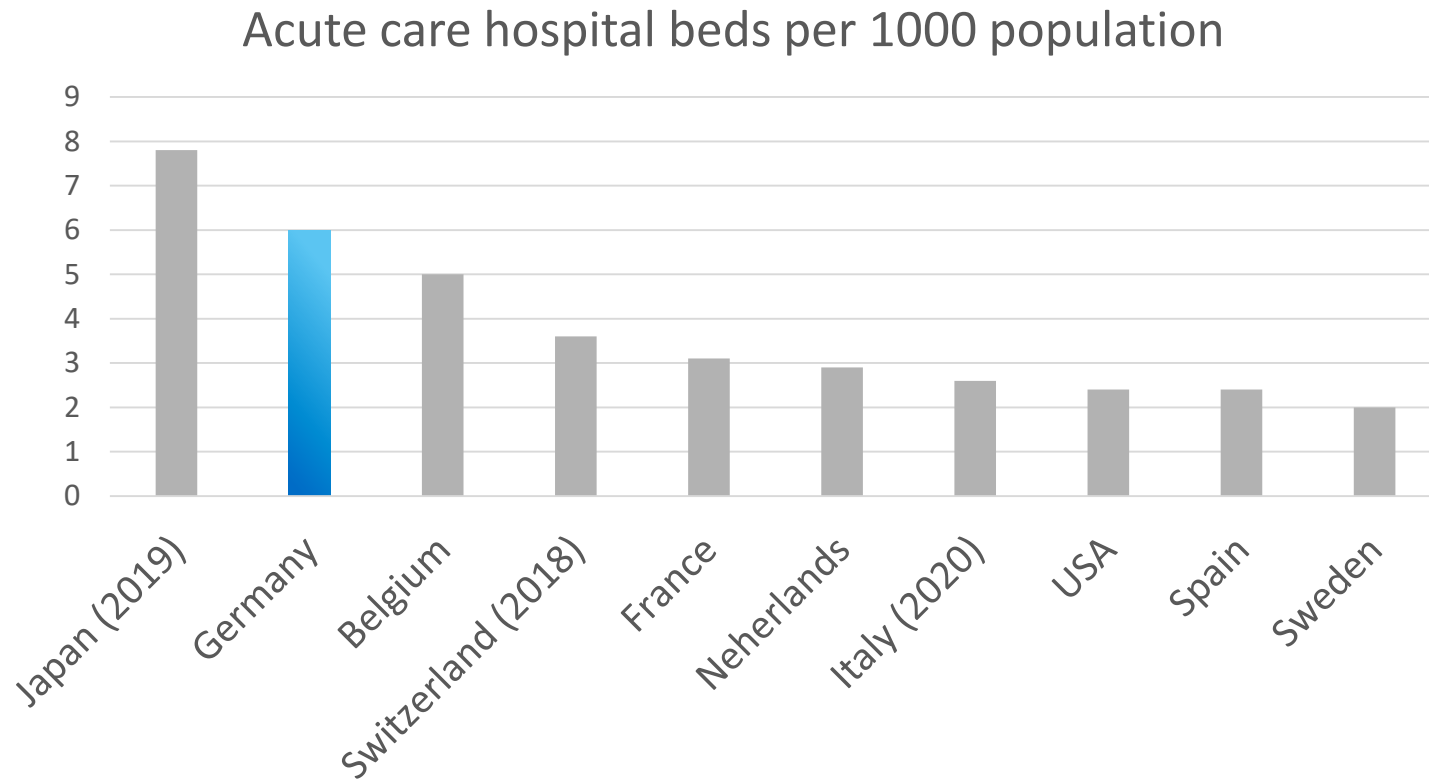
Covid related fatalities in Germany by age groups



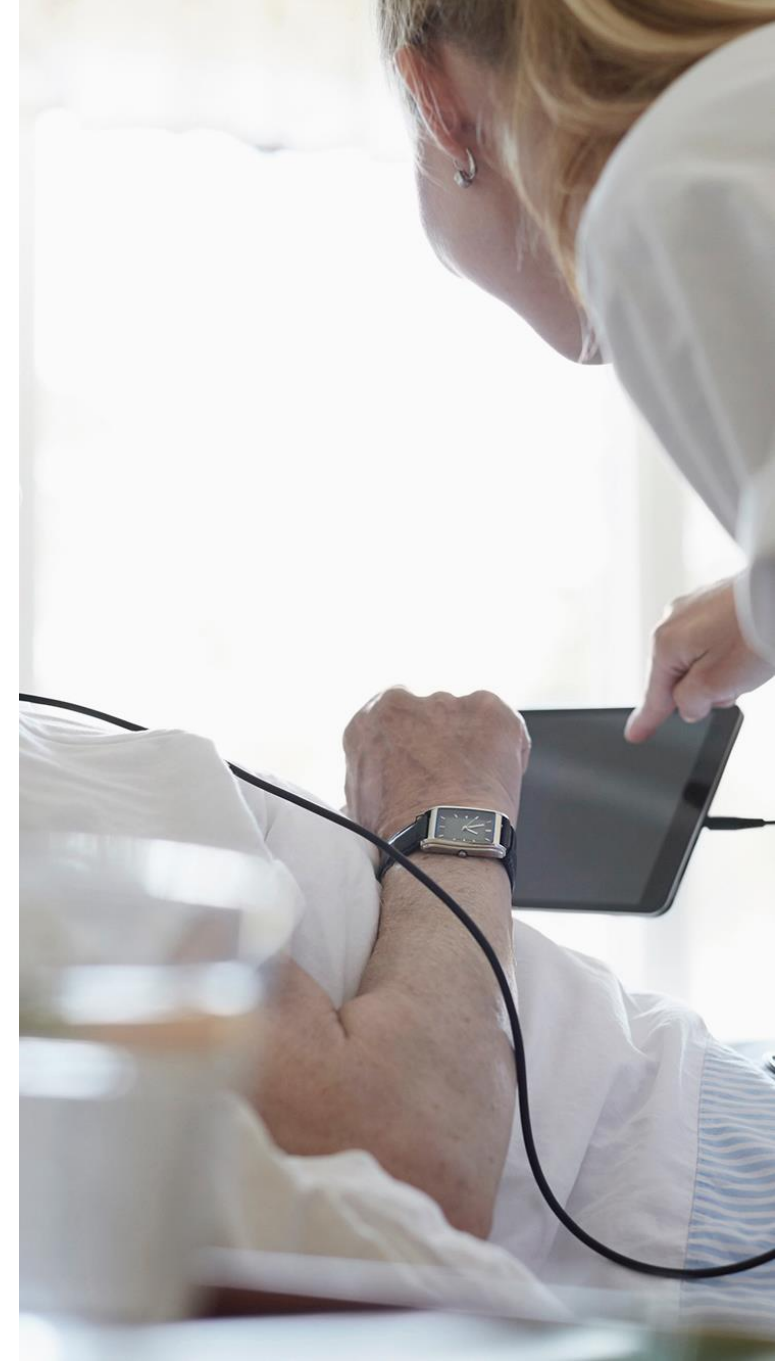
**About 86%
age 70 and up**

**Less than 0.5%
under age 40**

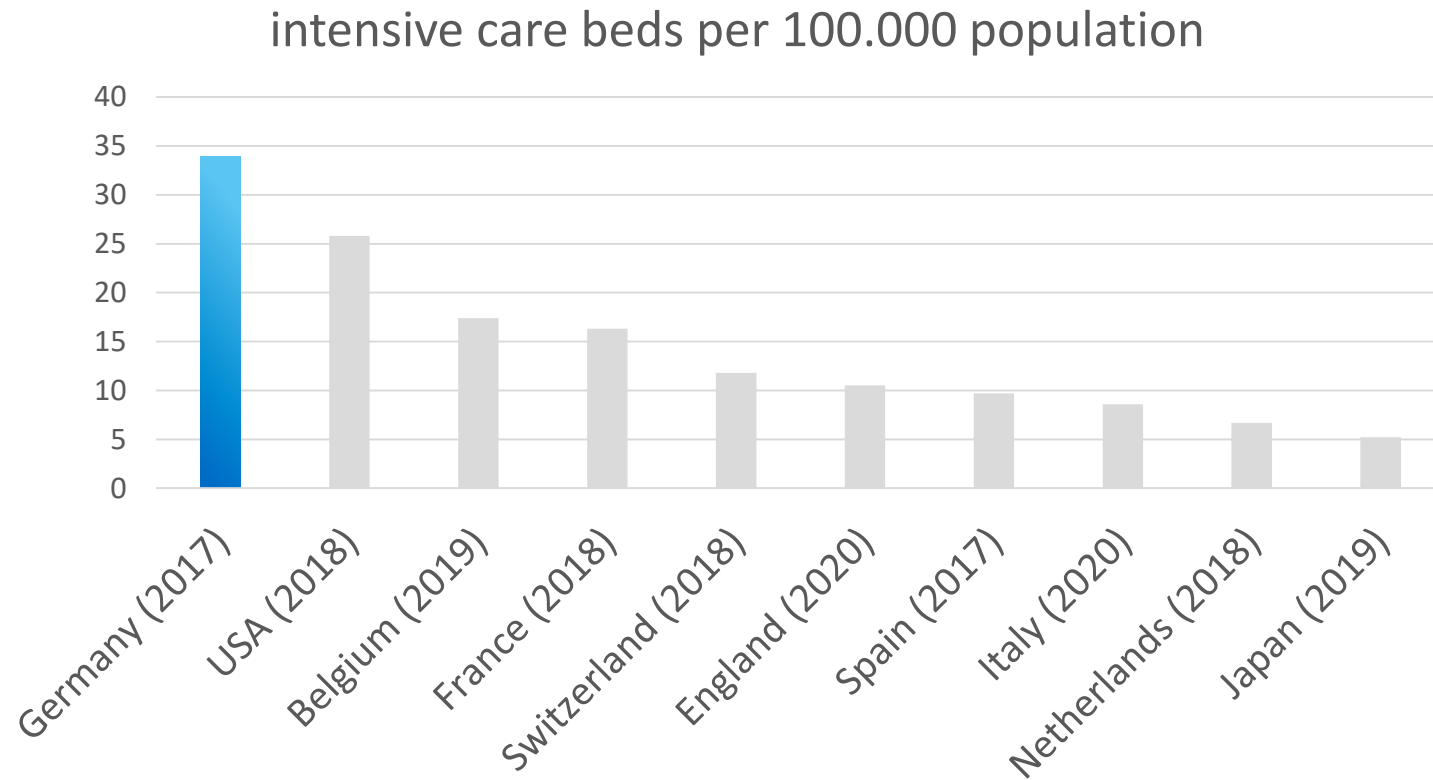
Healthcare infrastructure - hospital beds



Source: OECD Report „Health systems responses to COVID-19 in the OECD“, April 2020



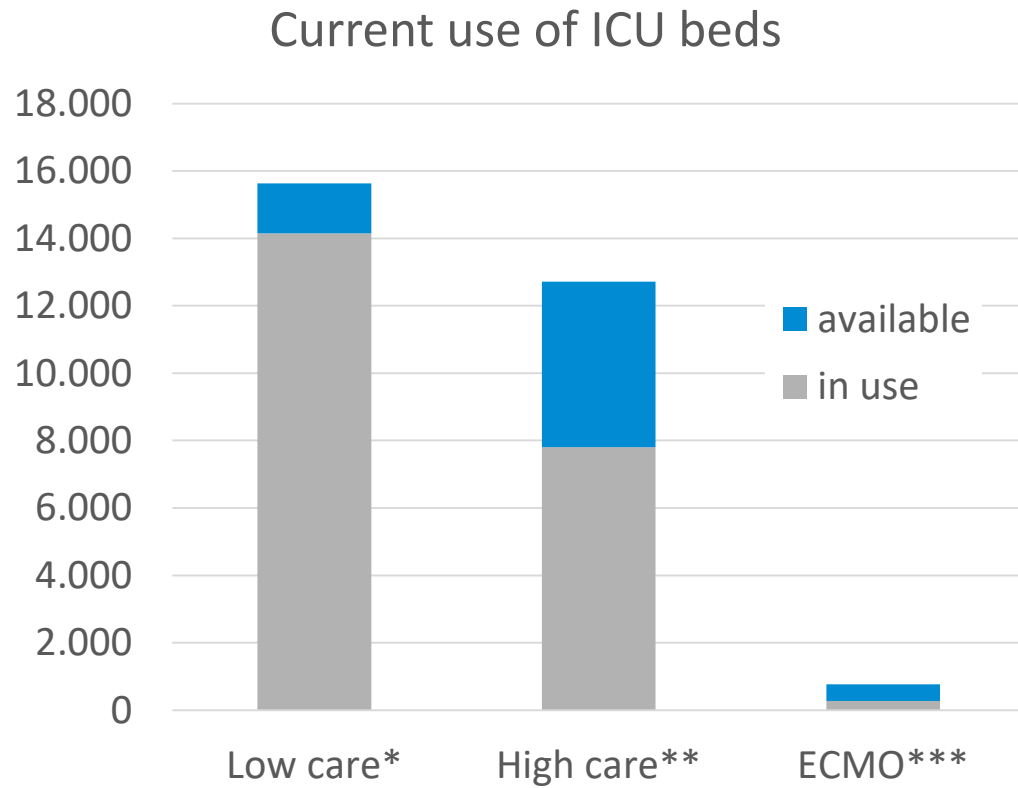
ICU Capacity



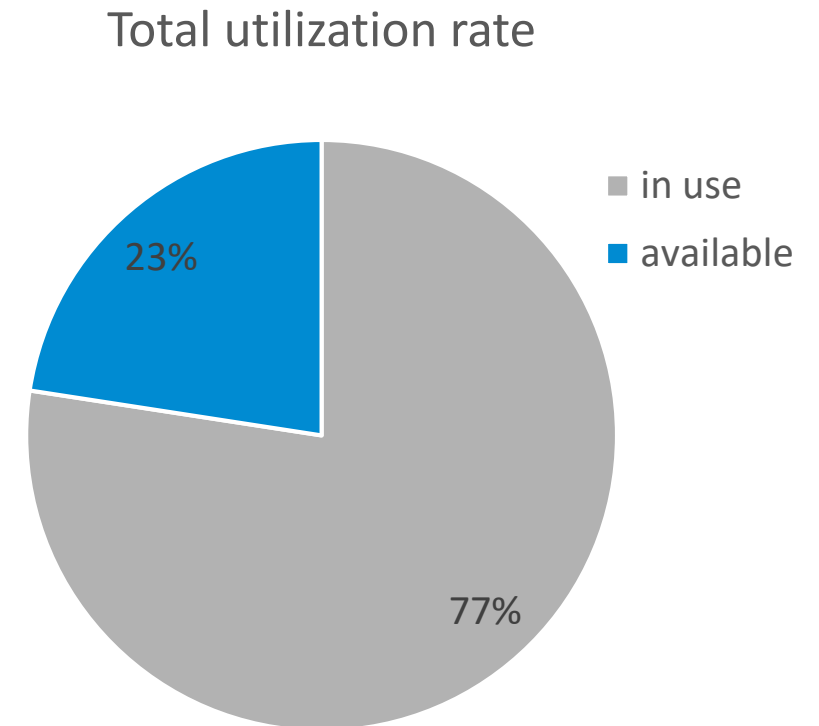
Source: OECD Report „Health systems responses to COVID-19 in the OECD“, April 2020



Utilization of ICU beds in Germany



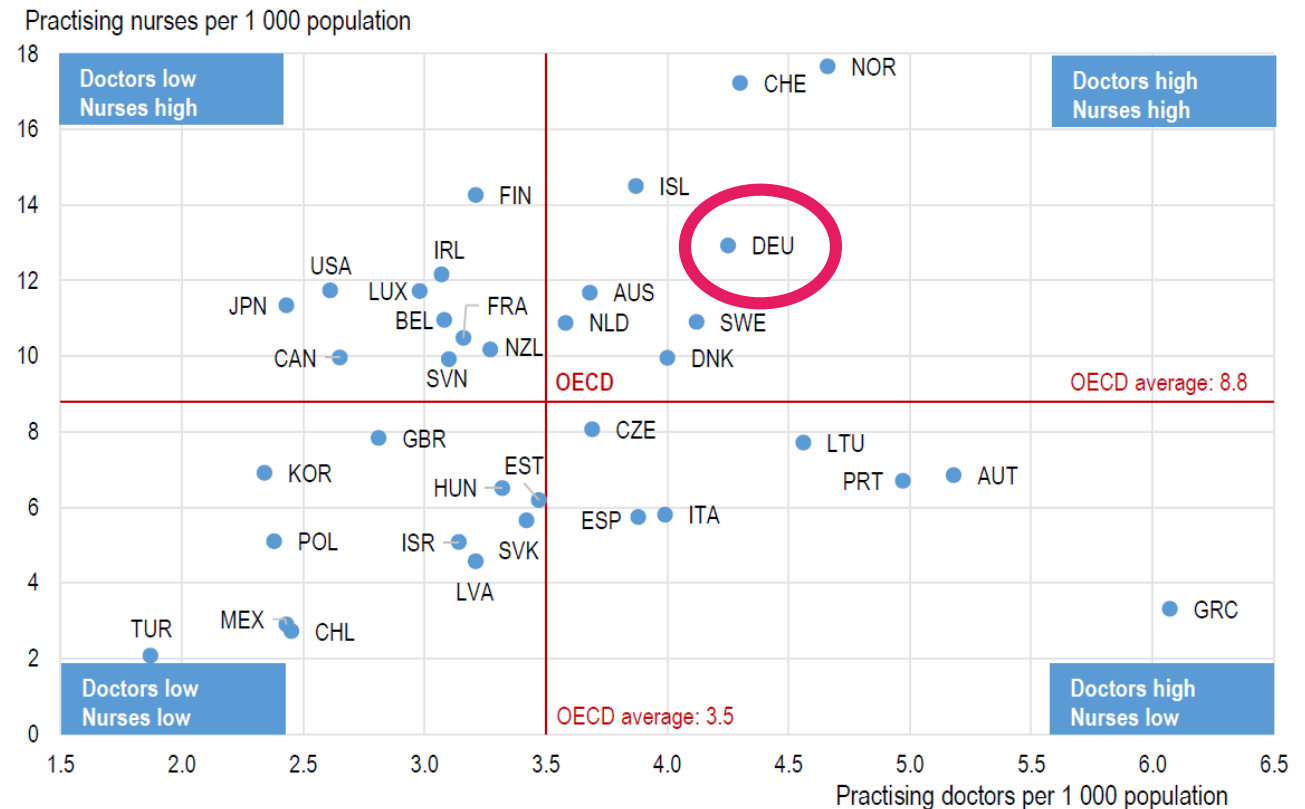
Source: statista, November 13, 2020



Source: statista, November 13, 2020



Number of doctors and nurses



Note: In Portugal and Greece, data refer to all doctors licensed to practice, resulting in a large overestimation of the number of practising doctors (e.g. of around 30% in Portugal). In Austria and Greece, the number of nurses is underestimated as it only includes those working in hospital.

Digitalization of healthcare sector

Lessons from „corona stress-test“

Digital Care Act

Regulatory Changes 2020/2021



Doctors are allowed to prescribe DIGAs (e.g. medical apps)



Improved access to patient data for research



GP/patient communication and prescription is moved to electronic channels



Every insured member will have access to an electronic health record

Digital Care Act

Regulatory Changes 2020/2021



Health insurance companies will be allowed to offer online member sign ups



Tele-consultations will be strengthened



Health innovation is financially supported: EUR 200 Mio. p.a.



Pharmacies connected to telematics infrastructure by Sep. 2020, hospitals by Jan. 2021

Incentive programs €9.5 Bn.

- Public health (€4 billion)
- Hospital modernization, esp. digital infrastructure (€3 billion)
- Local production of medicines and medical supplies (€1 billion)
- R&D of vaccines in Germany and for CEPI (€750 million)
- Local production of PPE and strategic reserve

Source: German Federal Ministry of Health



Key objectives

1

Upgrading healthcare infrastructure

2

Minimizing supply chain risks

3

Additional incentives for local development and production of innovative health care solutions

Monday, Nov. 16

Webinar with GTAI specialists and guest speakers



11:20 – 11:50

Germany's Digital Care Act

Regulatory changes and Fast Track program for medical apps



Monday, Nov. 16

Webinar with specialists and guest speakers



2 p.m. – 2:30 p.m.

Germany's Medical Device Market

How to commercialize innovative
medical devices in Germany



Wednesday, Nov. 18

Webinar with GTAI specialists and guest speakers



10:00 a.m. – 10:30 a.m.

Germany's IVD and Analytics Market

Market overview and regulatory aspects



Wednesday, Nov. 18



Webinar with GTAI specialists and guest speakers



11:20 a.m. – 11:50 a.m.

Germany's Medical Aids Market (*Hilfsmittel*)

Market trends, regulatory aspects and
reimbursement



Wednesday, Nov. 18



Webinar with GTAI specialists and guest speakers



2 p.m. – 2:30 p.m.

Financing and Incentives for R&D and Production in Germany

VC, grants, loans, stimulus packages



Webinars with further details

Monday, Nov. 16

- 11:20 – 11:50 **Germany's Digital Care Act**
Regulatory changes and the Fast Track program for medical apps
- 14:00 – 14:30 **Germany's Medical Device Market**
How to commercialize innovative medical devices in Germany

Tuesday, Nov. 17

- 11:20 – 11:50 **Chinas Medizintechnikmarkt im Zeichen der Corona-Krise**
- 12:00 – 12:30 **BREXIT Update Medizintechnik**

Wednesday, Nov. 18

- 10:00 – 10:30 **Germany's IVD and Analytics Market**
- 11:20 – 11:50 **Germany's Medical Aids Market ("Hilfsmittel")**
- 14:00 – 14:30 **Financing and Incentives for R&D and Production in Germany**



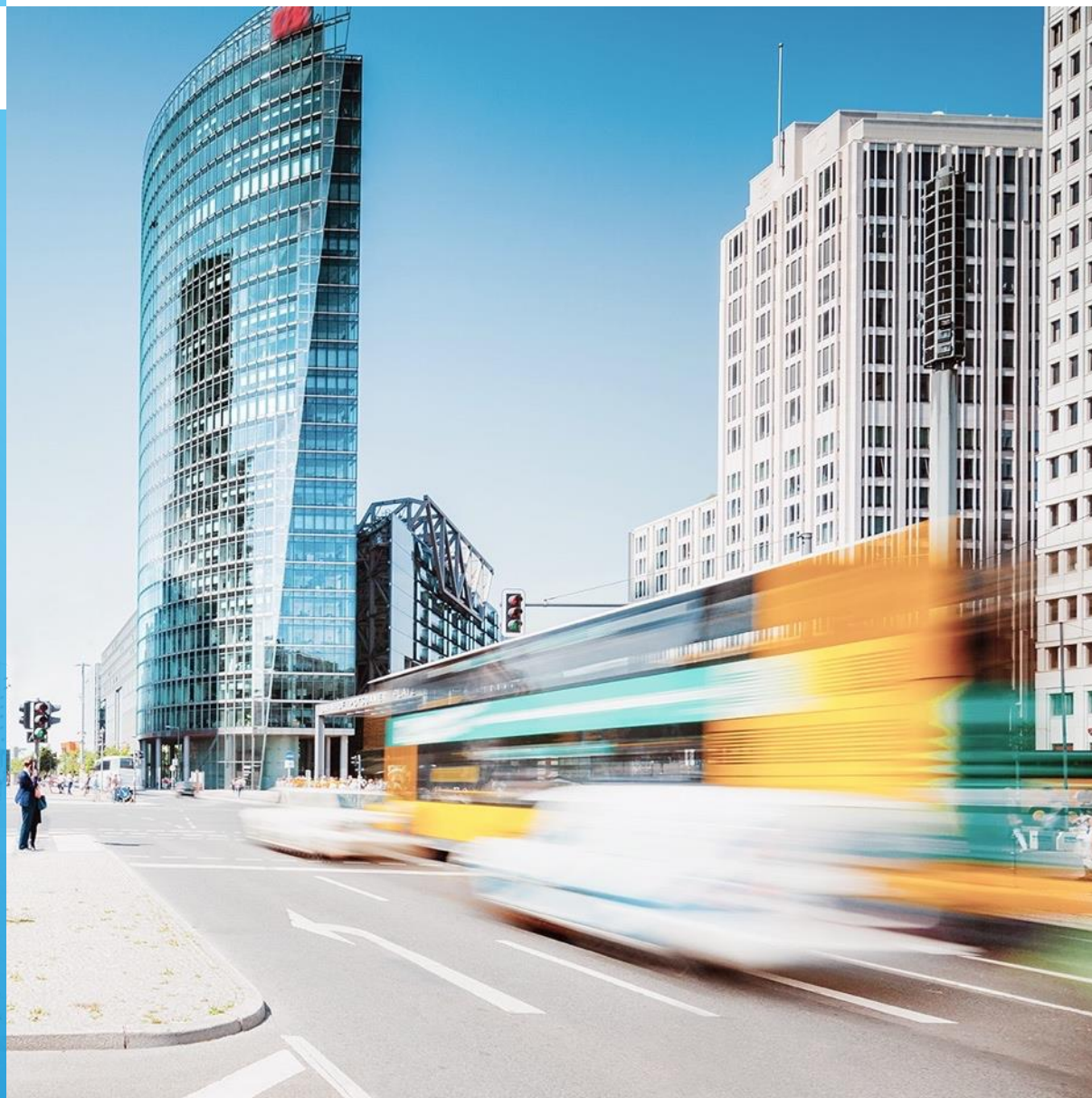
Leading International Trade Fair

DÜSSELDORF, GERMANY
16–19 NOVEMBER 2020

Member of  **MEDICA**lliance

Investor Consulting

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



Contact Us

Germany Trade & Invest is the economic development agency of the Federal Republic of Germany. The company helps create and secure extra employment opportunities, strengthening Germany as a business location. With more than 50 offices in Germany and abroad and its network of partners throughout the world, Germany Trade & Invest supports German companies setting up in foreign markets, promotes Germany as a business location and assists foreign companies setting up in Germany.

Contact

Dr. Marcus C. Schmidt
T +49 (0)30 200 099-600
marcus.schmidt@gtai.com

Berlin

Friedrichstraße 60
10117 Berlin
www.gtai.com



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

© Germany Trade & Invest

All market data provided is based on the most current market information available at the time of publication.

Germany Trade & Invest accepts no liability for the actuality, accuracy, or completeness of the information provided.

For further information, please visit

www.gtai.com