GTAI GERMANY TRADE & INVEST

virtual.MEDICA

GERMANY'S MEDICAL AIDS MARKET

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Julia Albrecht
Manager Healthcare / Investor Consulting
www.gtai.com

Dr. Tobias Volkwein
Lawyer and Associate Partner
www.db-law.de

Germany's Medical Aids Market

Julia Albrecht

Manager Healthcare / Investor Consulting
Germany Trade & Invest

Market Trends

Dr. Tobias Volkwein

Lawyer and Associate Partner
D+B Lawyers

Market Access

Before we start ...

Webinar is recorded and is available for retrieval after the webinar

Participants are muted
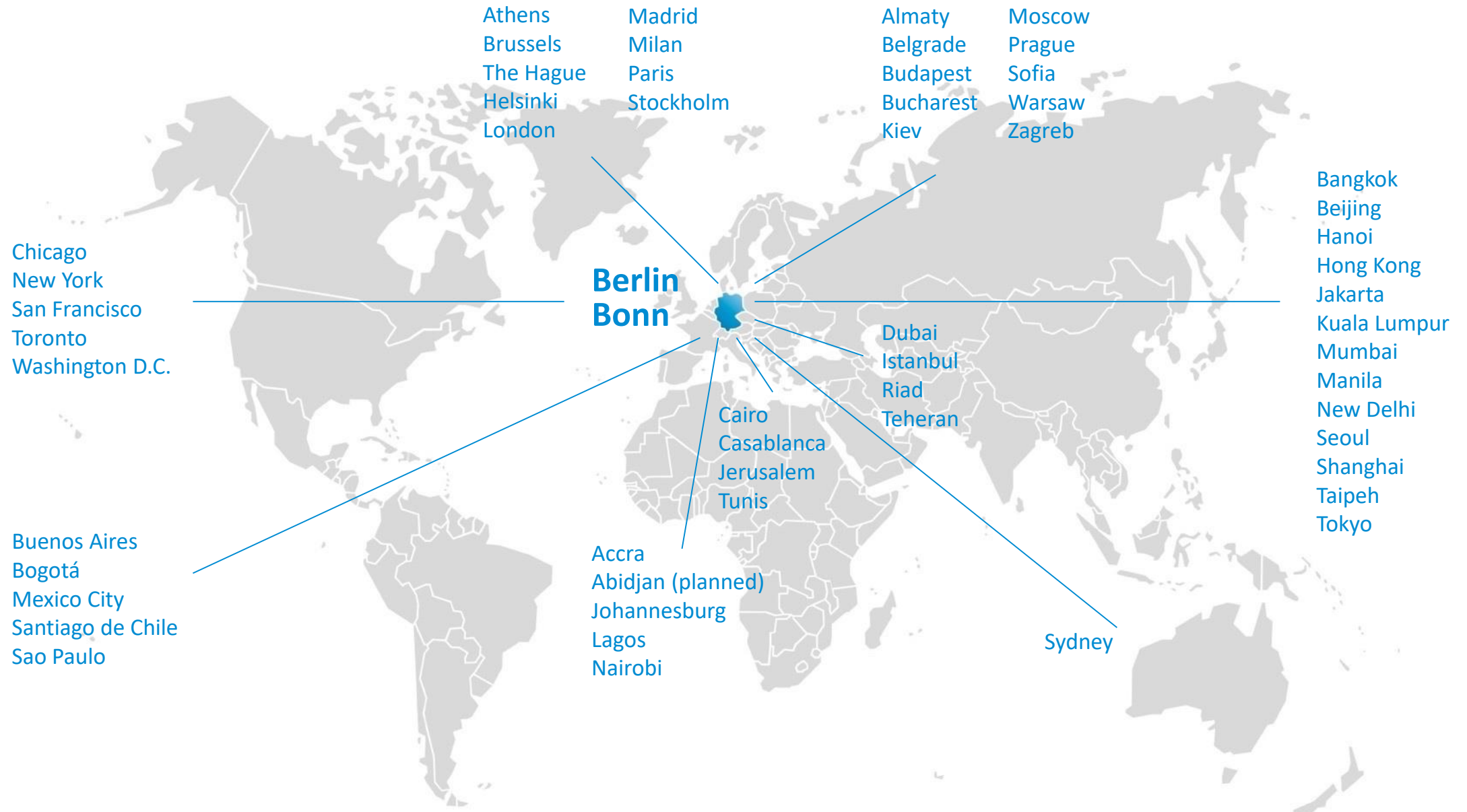
Questions via Q&A window possible at all times

Q&A session at the end of the webinar

ABOUT US

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

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Export Promotion

Investor Consulting

Location Marketing

New Federal States & Structural Transformation

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

EUR 400 billion healthcare expenditure

11.7% of GDP

73 million people have public health insurance

9 million people privately insured

7.5 million employment in healthcare
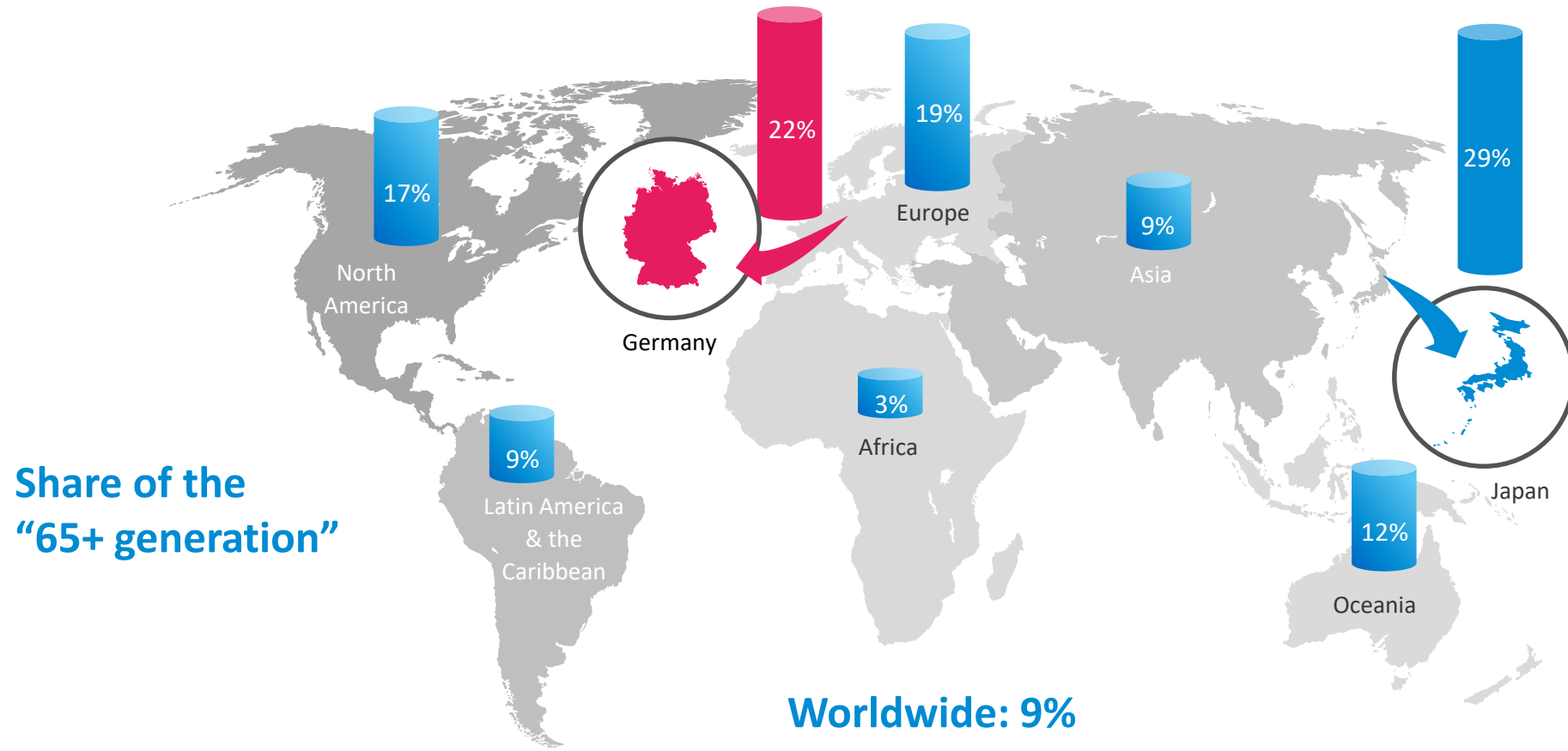
1,925 hospitals **500,000** beds
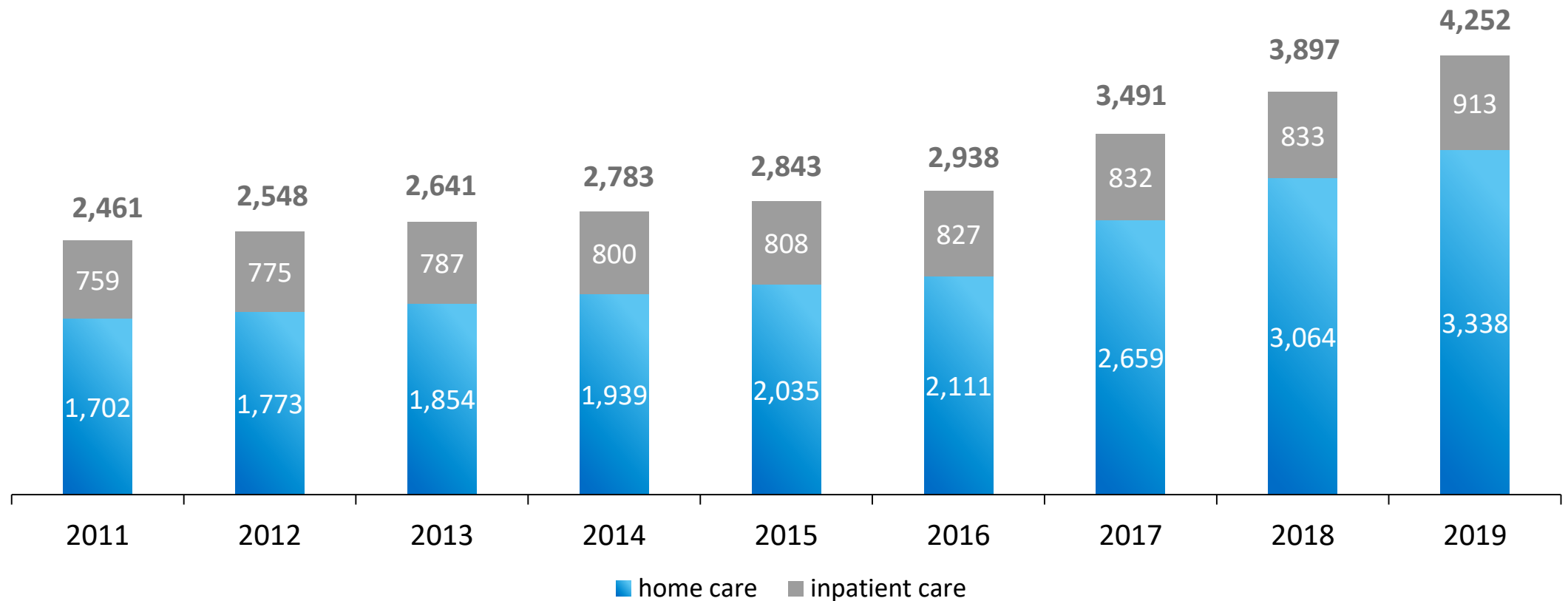
385,000 physicians

20,000 pharmacies

Demographic Change

The German population is one of the "oldest" worldwide

17% — North America

22% — Germany

19% — Europe

9% — Asia

29% — Japan

3% — Africa

9% — Latin America & the Caribbean

12% — Oceania

Share of the "65+ generation"

Worldwide: 9%

Care Recipients in Germany

Number of care recipients in Germany 2011 – 2019 (in thousands)

Year	home care	inpatient care	Total
2011	1,702	759	2,461
2012	1,773	775	2,548
2013	1,854	787	2,641
2014	1,939	800	2,783
2015	2,035	808	2,843
2016	2,111	827	2,938
2017	2,659	832	3,491
2018	3,064	833	3,897
2019	3,338	913	4,252

home care   inpatient care

Source: German Federal Ministry of Health 2020

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Nursing Homes & Service Providers

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

Year	nursing service providers (outpatient care)	nursing homes (inpatient care)	Total
1999	10,820	8,859	19,679
2001	10,594	9,165	19,759
2003	10,619	9,743	20,362
2005	10,977	10,424	21,401
2007	11,529	11,029	22,558
2009	12,026	11,634	23,660
2011	12,349	12,354	24,703
2013	12,745	13,030	25,775
2015	13,323	13,596	26,919
2017	14,050	14,480	28,530

■ nursing service providers (outpatient care) ■ nursing homes (inpatient care)
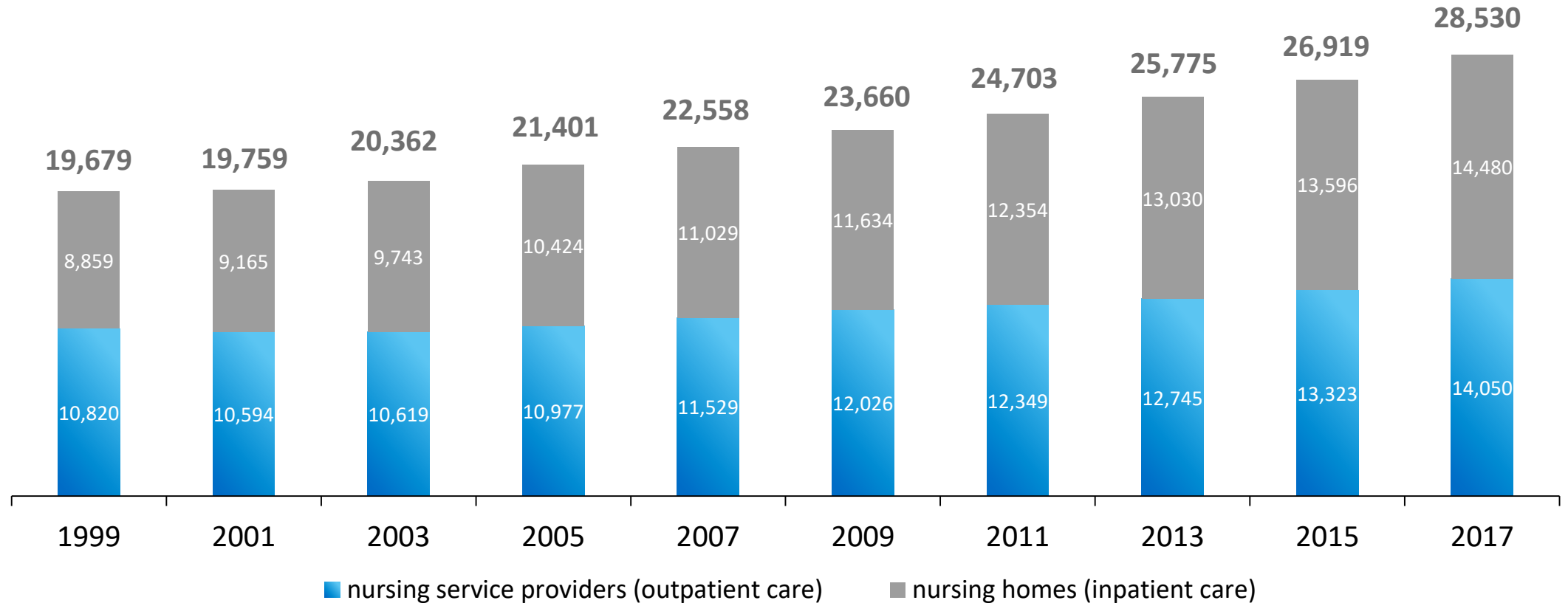
Source: German Federal Statistical Office 2019

The German Medical Aids Market

A wide range of assistive devices and mobility equipment

Prostheses and orthoses

Walking aids and wheelchairs

Visual aids
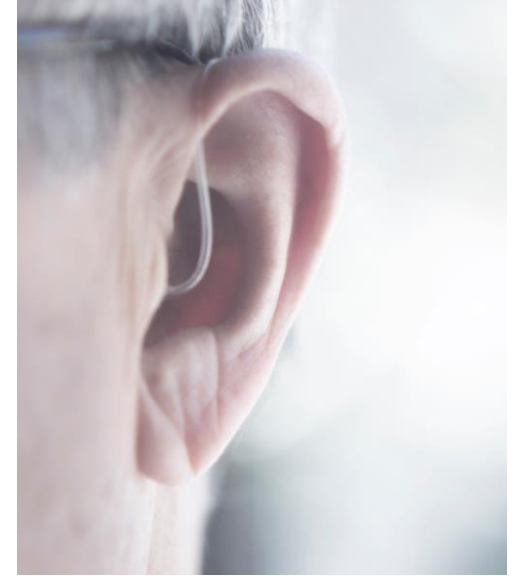
Hearing aids

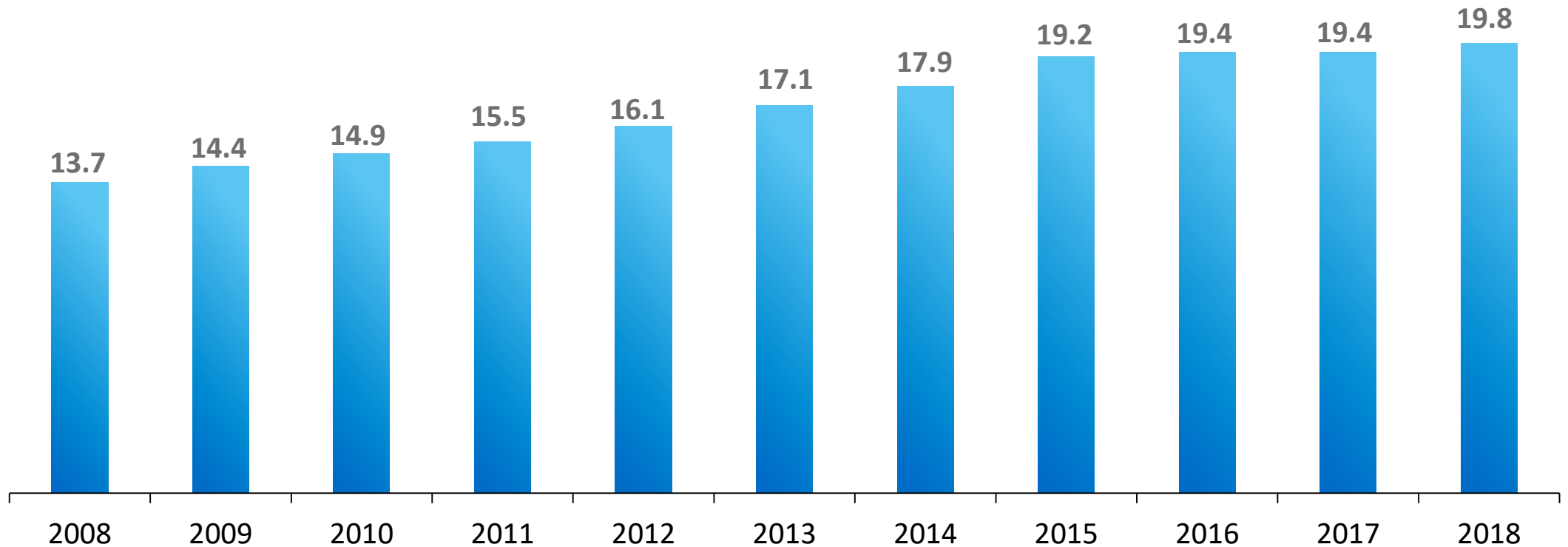*Note: The listed product categories are only examples.*

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 2008 – 2018 (in EUR billion)

Year	Value
2008	13.7
2009	14.4
2010	14.9
2011	15.5
2012	16.1
2013	17.1
2014	17.9
2015	19.2
2016	19.4
2017	19.4
2018	19.8

Source: German Federal Statistical Office 2020

The German Medical Aids Market

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

Segment	Growth Rate
Nursing beds, anti-decubitus aids, incontinence care, compression therapy	78%
Oxygen concentrators, respiratory therapy equipment, tracheostoma devices	42%
Visual aids, white sticks, obstacle detection	34%
TENS devices, infusions	27%
Hearing aids	27%
Dialysis machines, medical aids for home dialysis	22%
Rollators, wheelchairs, shower and bathing aids	16%

Note: The growth rates refer to the expected increase in demand based on the units sold, not on revenue.
Source: German Federal Statistical Office 2019 / Spectaris 2012

The German Medical Aids Market

Statutory pension insurance
0.1%

Public budgets
0.4%

Statutory accident insurance
1.6%

Social long term care
insurance
3.0%

Employers
3.1%

Private health
insurance
5.9%

Statutory health
insurance
44.4%

EUR
19.8 billion

Private households
41.5%
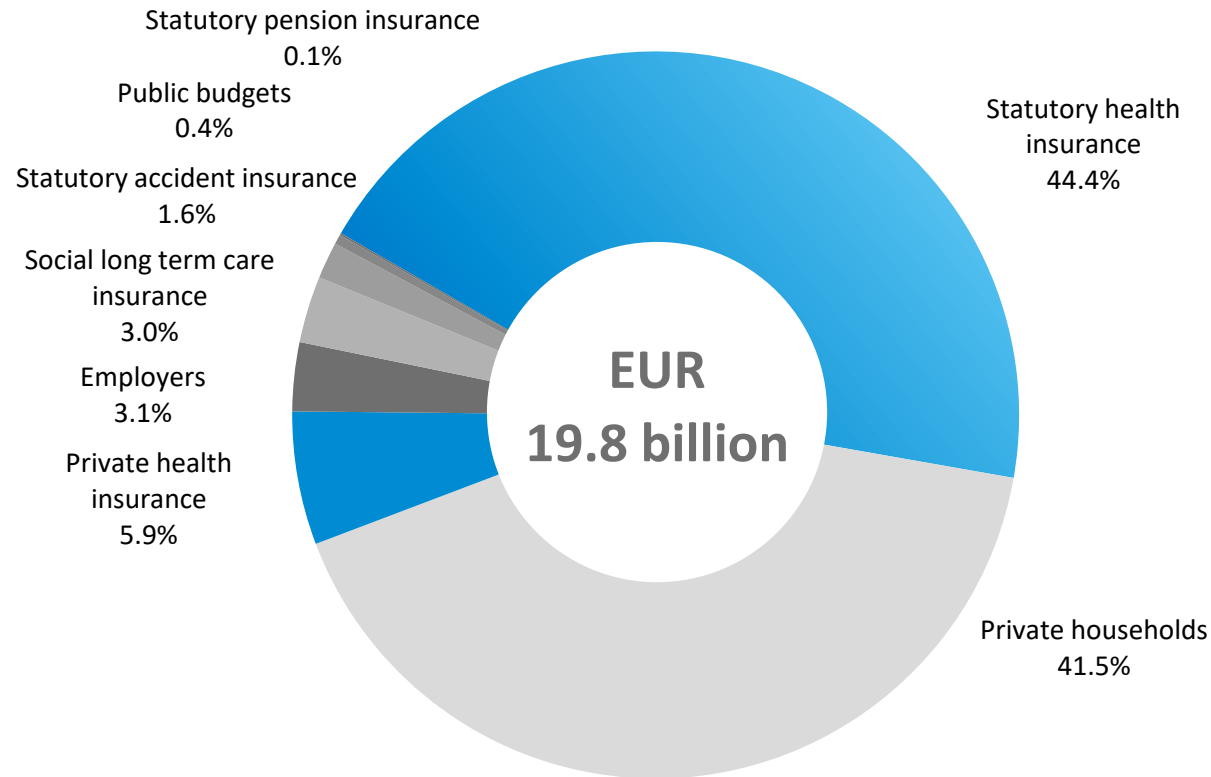
Sources of financing covering spendings on medical aids 2018

Note: The item private households includes non-profit institutions serving households.
Source: German Federal Statistical Office 2020

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)

Source: Germany Trade & Invest 2020

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