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

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The German Consumer Healthcare Market
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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

Source: Wiegand 2014
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

Source: OECD, 2015
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
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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)

- Prevention/Health protection: 3%
- Medical services by doctors: 11%
- Caring/Therapeutic services: 18%
- Board and lodging: 25%
- Products: Medicinal products, medical aids, etc.: 43%

Source: Gesundheitsberichterstattung des Bundes 09.05.2016
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HEALTHY LIVING

Market boost: The out-of-pocket health phenomenon and its opportunities.
Out-of-Pocket Spending on Health per Adult

Out-of-pocket spending per adult:

~ 900 Euro p.a.

Source: Roland Berger, 2007; Bundesministerium für Gesundheit, 2015
Out-of-Pocket Spending on Health per Adult

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

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)

Source: BfFS FuJ: Wirtschaftsmotor Alter, Endbericht, 2007
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 Age-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

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Market Opportunities in the Healthcare Sector

Source: Statistisches Bundesamt, Statista, 2013
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