

# GERMANY'S HEALTHCARE MARKET

TRENDS AND MARKET OPPORTUNITIES

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[www.gtai.com](http://www.gtai.com)



# Healthcare Market Germany

**€ 466 billion**  
healthcare expenditure

**€5,600**  
spending per capita

**90%**  
of people have public health insurance

**10%**  
privately insured

**1,900**  
hospitals  
**~500k**  
beds

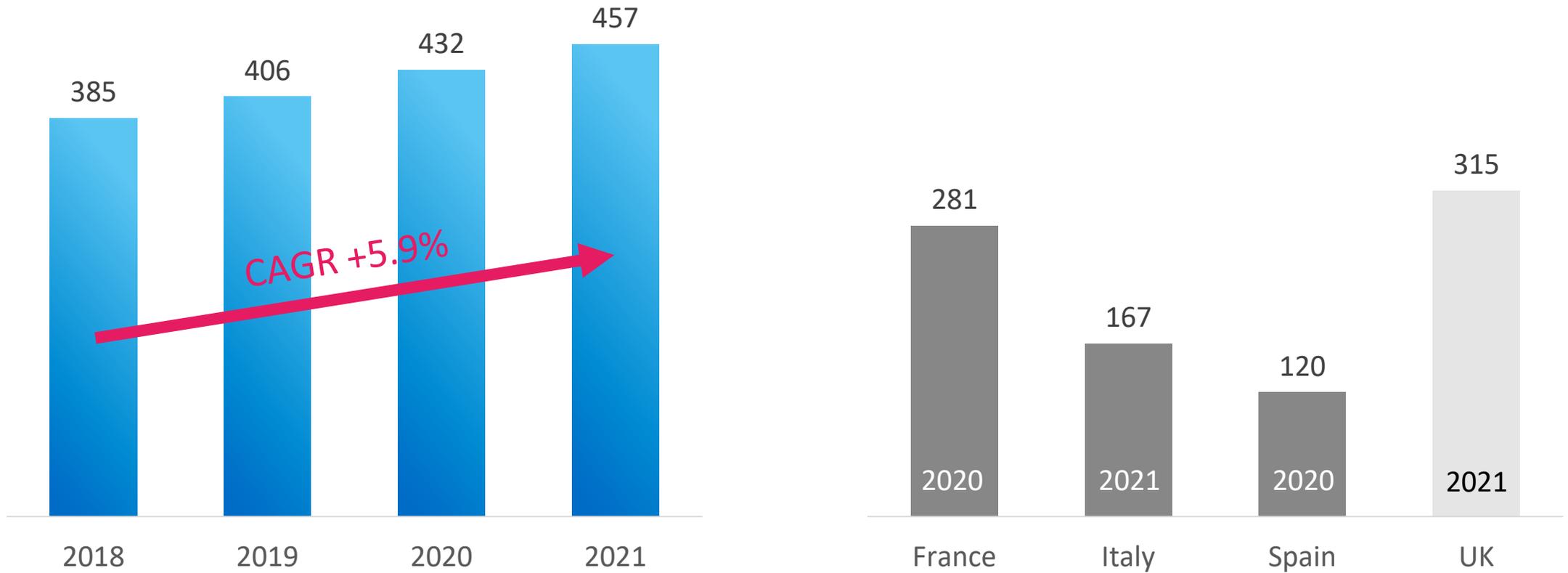
**416,000**  
active physicians

**18,000**  
pharmacies

**7.5 million**  
employment in healthcare

# Germany is the largest HC market in Europe

Healthcare spending in Europe (in € Billion)

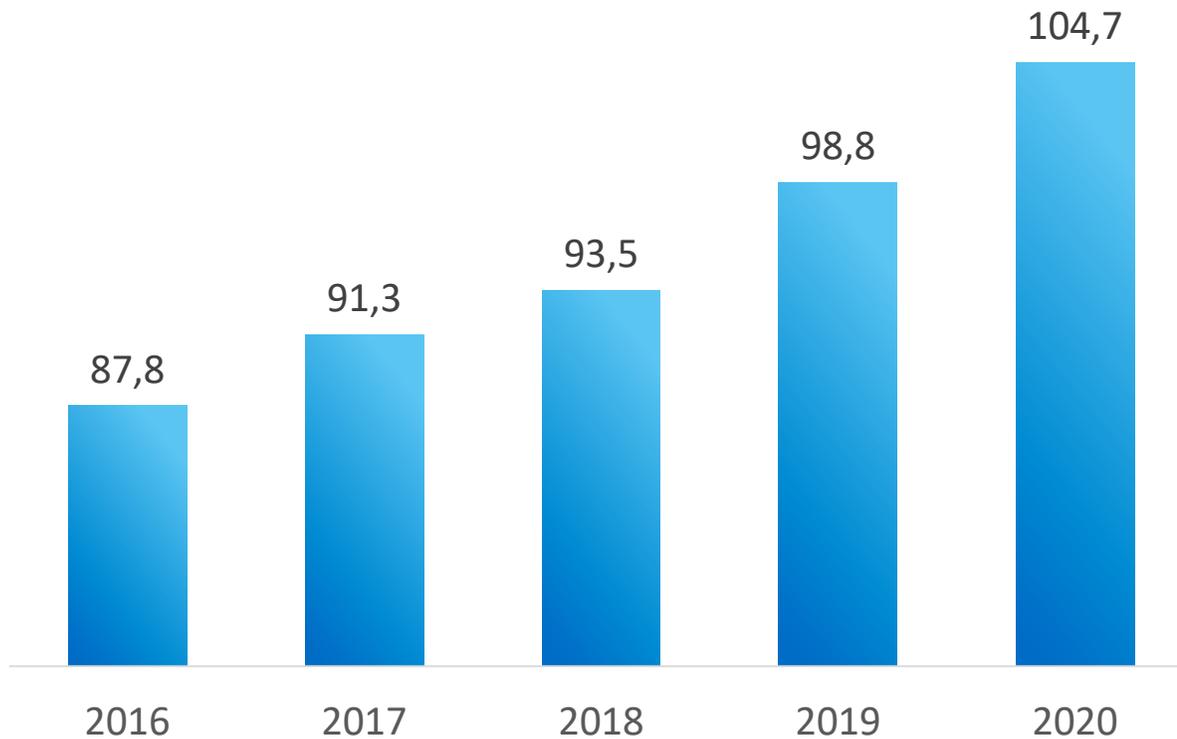


Source: OECD 2022

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# Hospital spending continues to increase

Total spending of German hospitals 2016 – 2020 (in € Billion)

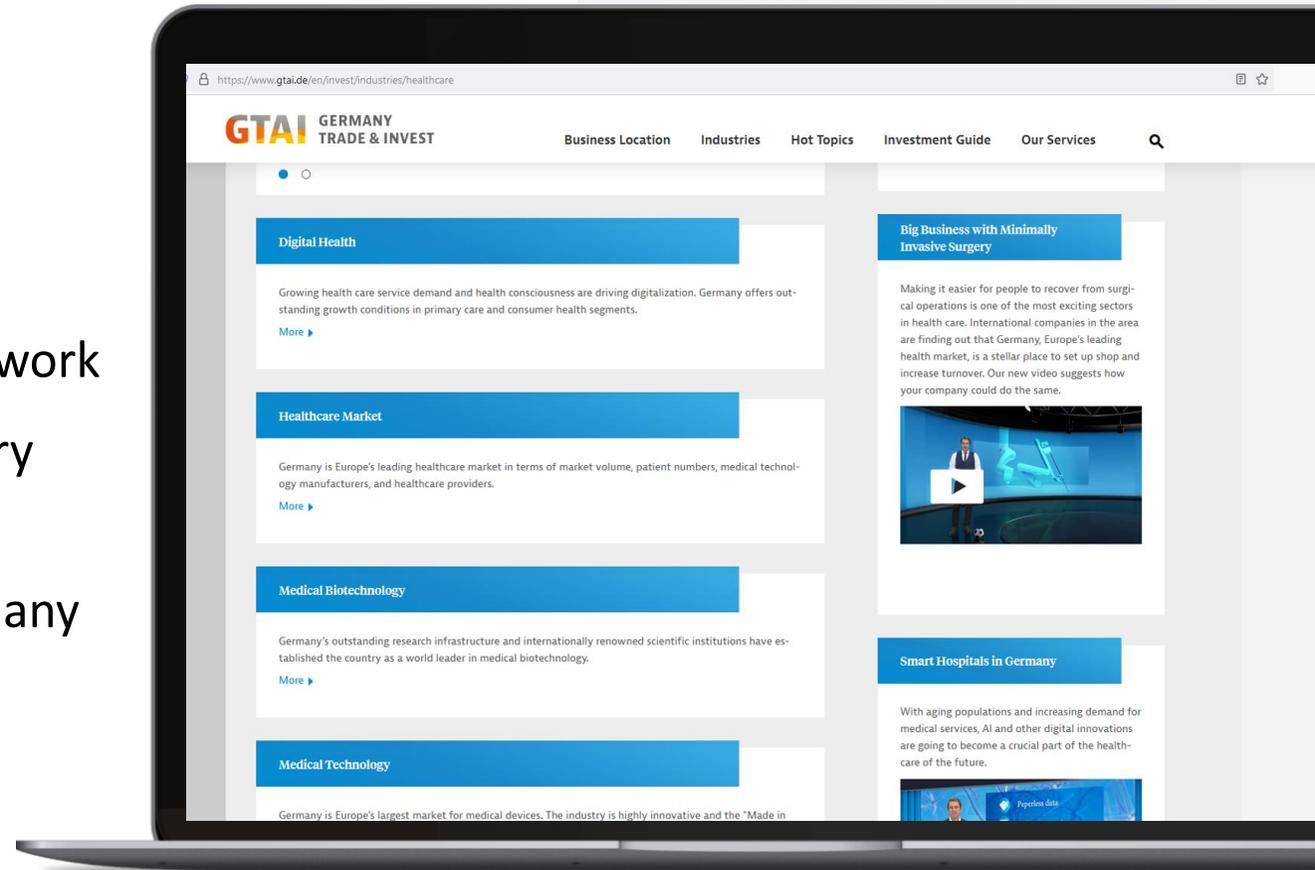


In 2019 German hospitals spent EUR 5.088 per case (+5.5%)

# For more market data please visit

[www.gtai.com/healthcare](https://www.gtai.com/healthcare)

- How does the German healthcare system work
  - Key data about German healthcare industry and sectors
  - Recent articles about life sciences in Germany
  - Videos
  - Publications
- ... and more



# Medical Technology in Germany at a glance 2021



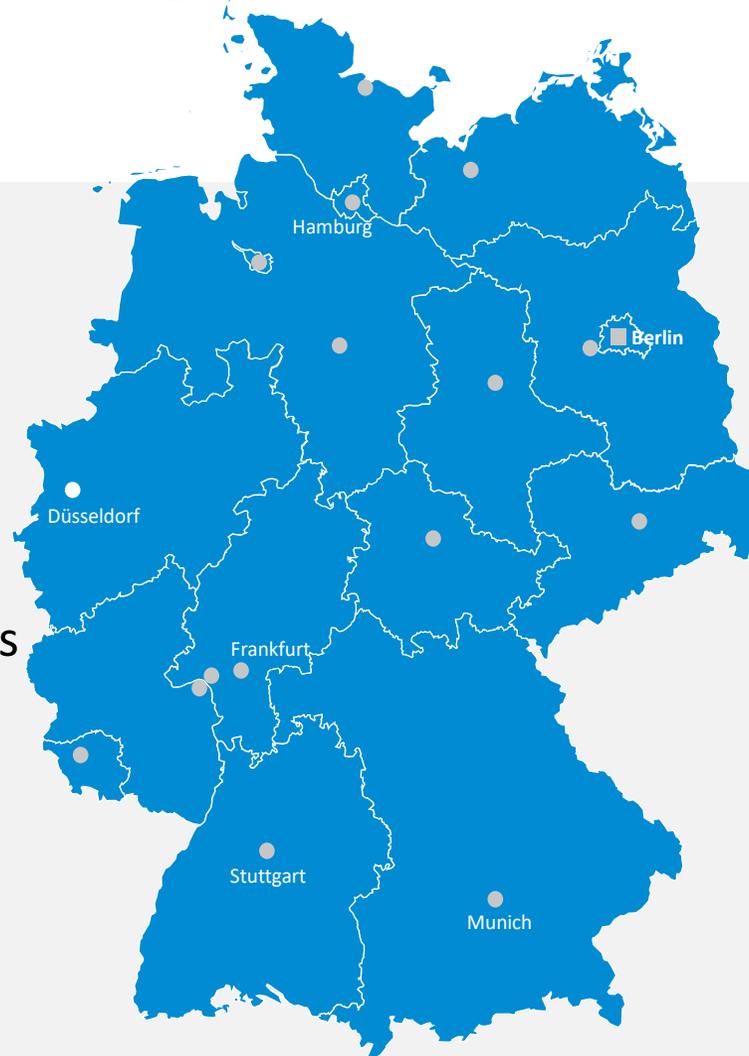
450,000+ different  
medical devices



1,450+ manufacturers  
(w. 20+ employees)  
13,000 small companies  
95% SME



236,000 employees



€ 37B market volume



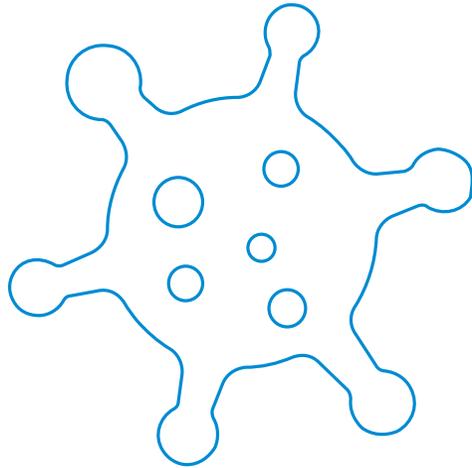
66% of products made  
in Germany exported.  
Imports: € 16B



9% of revenue spent  
on R&D

# Market Drivers

The pandemic was a stress test on many healthcare systems, including Germany.



## **Providing critical public health / IT services**

e.g. testing, reporting, apps (appointments, warnings, vaccination certificates)

## **Quality care with limited physical contact**

e.g. ambulatory, hospitals, rehab, elderly care

## **Scaling up services with limited / fewer resources**

e.g. diagnostics, ICU, vaccination centers, ...

## **Rapid development and production of medical products**

e.g. vaccines, medications, protective equipment, ventilators, ...

# Key trends and market applications include

Automation →



Biotechnology & Pharmaceuticals

Smart Systems, Digitalization →



Rehab



Diagnostics

Visualization →



Imaging & Robotic Surgery

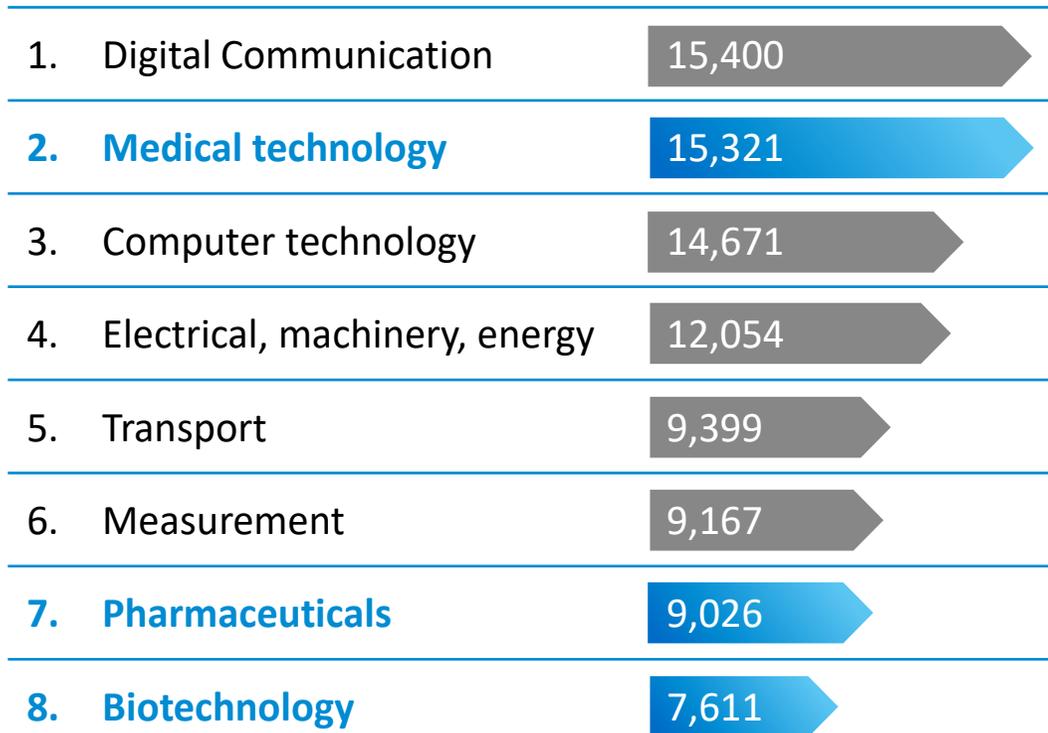
Miniaturization, Robotics →



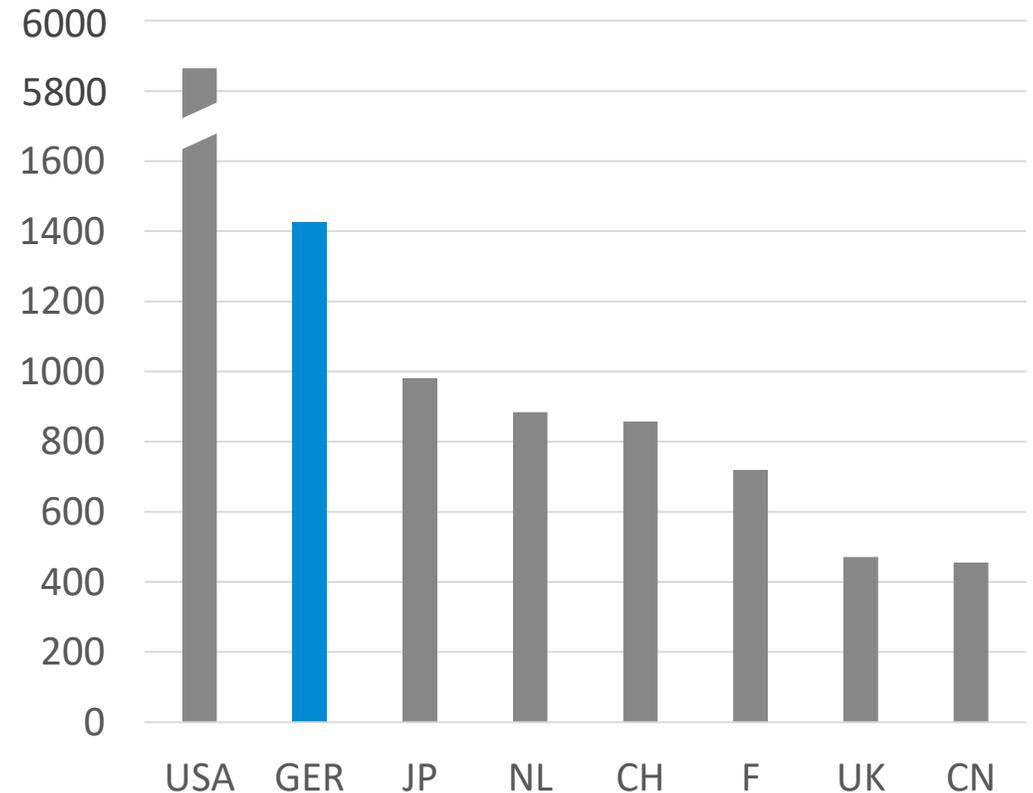
Telemed / Apps

# Innovation is a key to success in the European medical device market

## Number of applications at European Patent Office 2021



Source: European Patent Office, 2022



Source: European Patent Office, 2022

# Monday, Nov. 14

Presentation by Gabriel Flemming and guest speakers

Hall 15

J 10



13:00

## Medical Technology Clusters in Germany

News and trends update

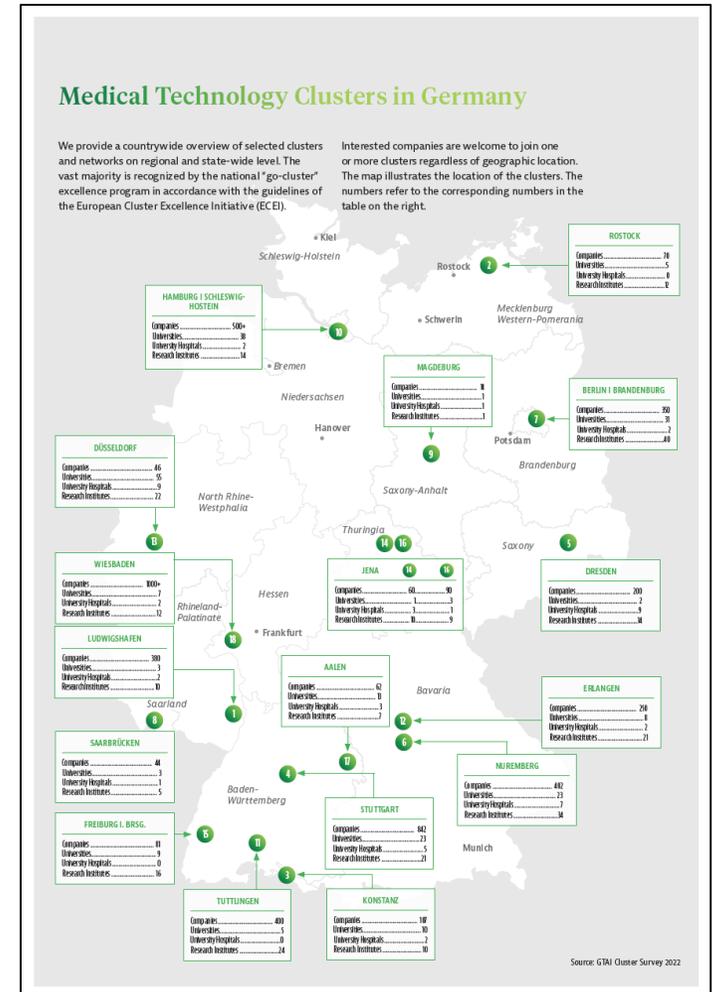


# Germany's Medical Technology Clusters

## GTAI Innovation Cluster Survey 2022

### Key networks facts & figures:

- 18 networks in survey, 13 with certification
- 3000+ member companies
- 200+ research institutes
- 100+ universities
- 35 member university hospitals



# Monday, Nov. 14

Presentation by Gabriel Flemming and guest speakers

Hall 15

J 10



15:00

## Germany's Medical Device Market

How to commercialize innovative medical devices in Germany



# Hospital Reimbursement Requires Strategy

Option 1: use existing DRGs+OPS →

Quick access to the market (§137 c, SGB V)

Option 2: NUB track →

Register your individual OPS and DRG in case of new methods (§137 h, SGB V)

Option 3: coverage by evidence →

Receive reimbursement during clinical trial (§137 e, SGB V)



# Digitalization

Electronic patient records

Digital exchange of health data

Telemedicine (monitoring, consultation)

Medical Apps (on prescription)

Electronic prescription system

Health Data for R&D (donation system)

Artificial Intelligence

Mobile / smart devices...

# Tuesday, Nov. 15

Presentation by GTAI specialist Gregor Kemper



15:00

Hall 15

J 10

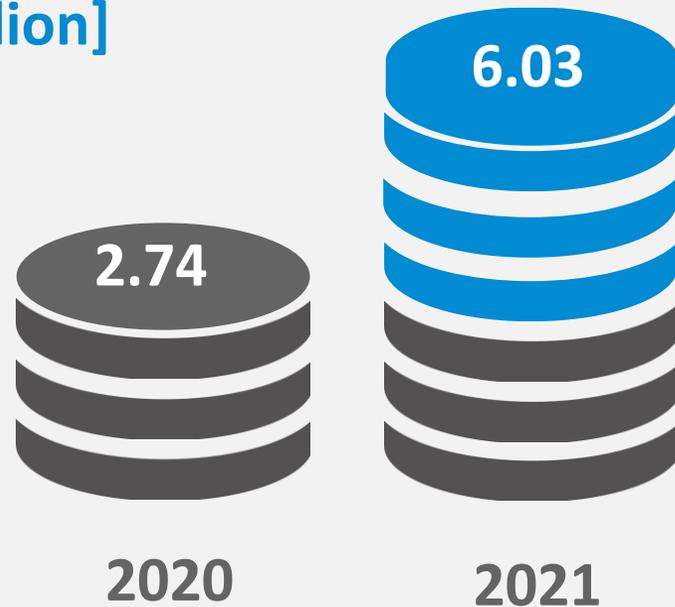
## In Vitro Diagnostic and Analytics

### German market update



# Diagnosics sales in Germany experienced an unprecedented growth of 120% in 2021

[EUR Billion]



Source: VDGH, Statista Research



# Wednesday, Nov. 16

Presentation by GTAI specialist Julia Pietsch



15:00

Hall 15

J 10

## Germany's Digital Healthcare Market

Market trends and access





# Market Volume Digital Health 2026

Germany  
59 billion Euro

Source: Roland Berger 2021

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# Presentations at our booth J10

Monday, Nov. 14

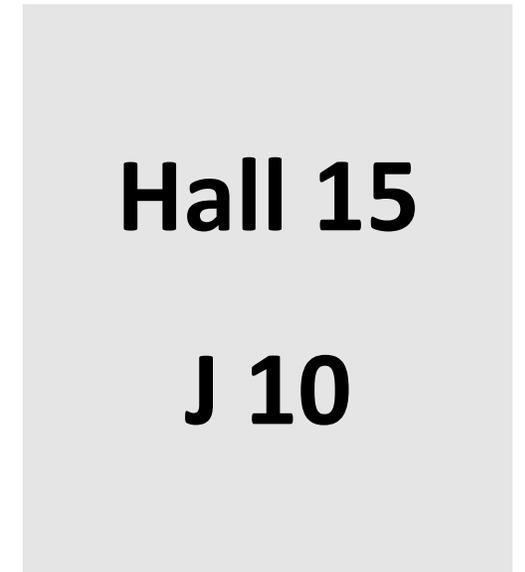
- 11:00 **Germany's Healthcare Market**  
Trends and market opportunities
- 13:00 **Medical Device Market Access**  
Best practices, regulatory, and reimbursement update
- 15:00 **Medical Technology Clusters in Germany**  
News and trends update

Tuesday, Nov. 15

- 15:00 **In Vitro Diagnostic and Analytics Market**  
German market update
- 16:00 **ドイツヘルスケア市場における成功のために**  
市場のトレンドとビジネスチャンス

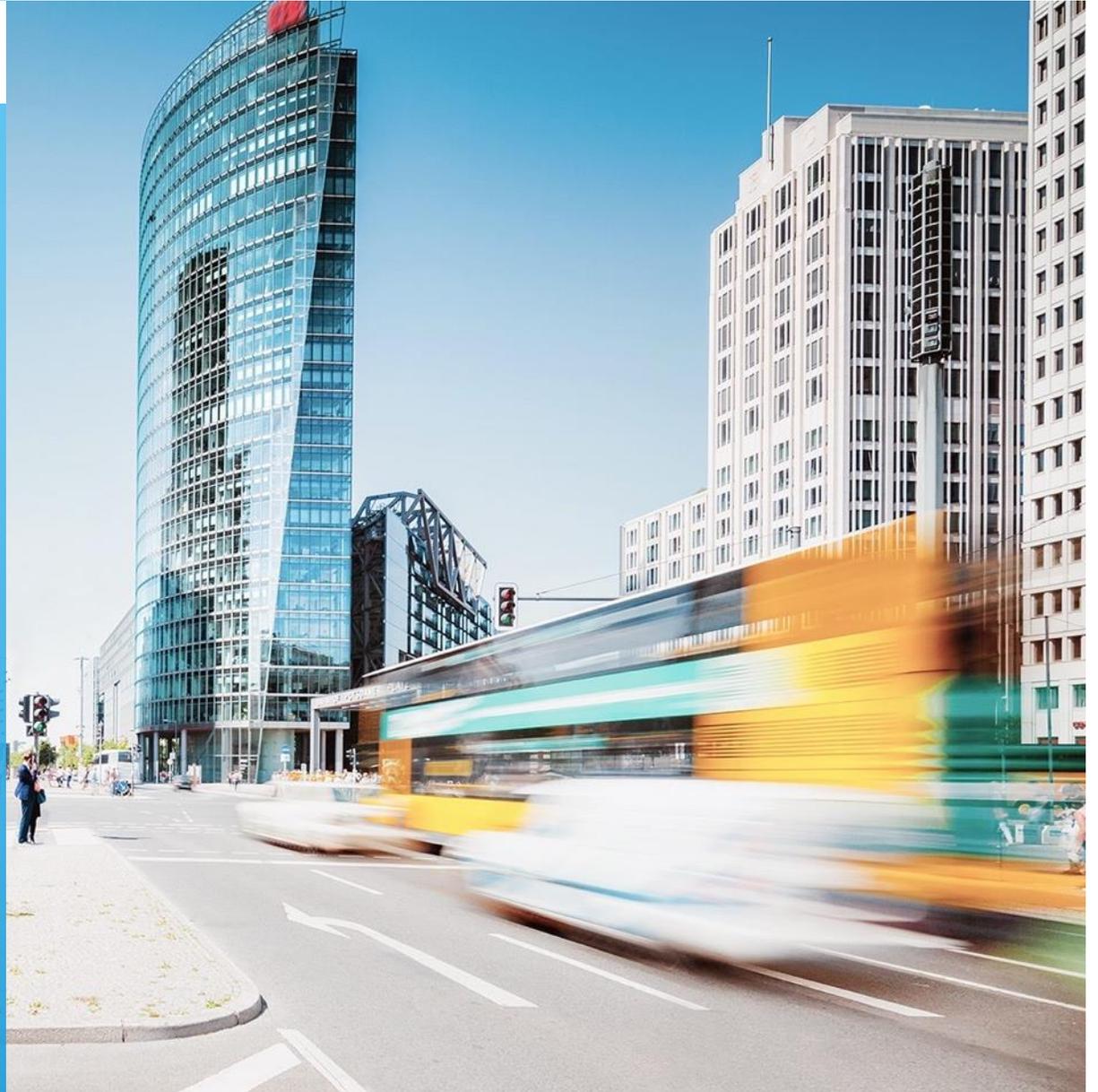
Wednesday, Nov. 16

- 15:00 **Germany's Digital Healthcare Market**  
Market trends and access



## Our services for international clients

- Information about growth markets in Germany
- Legal information
- Tax information
- Incentives and financing information
- Introduction to local partners
- Site selection support



For further information, please visit

**[www.gtai.com/medica](http://www.gtai.com/medica)**