

# BDG INDUSTRIAL SOLUTIONS

Germany's Health Care Industry



# The German healthcare market



A brief Overview

## The industry in numbers

Last measured in 2013, the total of Germany's health care expenditure added up to 11.3% of GDP which equals a total estimated public and private spending of EUR 326.6 billion for health services (preventive and curative), family planning activities, nutrition activities, and emergency aid.

Market forecasts show a positive market development to a total of 11.7% of GDP as well as a 3.8% annual increase of health care spending to a total of EUR 373 billion by 2018.

## Market Trends and Opportunities

Market trends promise a positive outlook for Germany's medical and health care industry for 2016 and beyond. One of the main industry trends results from demographic changes in the country's population i.e. population aging. In 2015, 21% of the 82 million Germans were 65 or older.

The share of that age group is predicted to increase up to 22% by 2018 and thus boost the demand for treatment of age-related conditions and elderly care. Another positive industry outlook derives from an increasing prevalence of life-style-related chronic diseases.

Sources: Trading Economics, Deloitte



# The Market and its Structures



The medical and healthcare industry includes a broad range of different industry sectors that need a bespoke approach. BDG divides the various industry products and services into 5 categories:

<b>Preventive medical efforts</b> € 10 billion	<b>Diagnostic and curative medical efforts</b> € 87 billion	<b>Care and therapeutic treatment</b> € 79 billion	<b>Healthcare products</b> € 83 billion	<b>Medical logistics</b> € 47 billion
General health protection Health promotion Early diagnosis Others	Basic medical treatment Special medical treatment Laboratory tests Diagnostic radiology	Prenatal care Therapeutic treatment Patient care	Pharmaceutical products Medical instruments/devices/utilities Dental prostheses Others	Transports Hospital accommodation and catering Administration

Source: Statistisches Bundesamt



## BDG Healthcare Market Entrance



In order to start a successful healthcare project in Germany, we strongly advise companies to follow our entry plan that is based on extensive experience in this field:

**1. Product Review**

**2. Market Analysis**

**3. Market Access & Pricing**

**4. Organization & Compliance**

**5. Market Strategy**

## WHY US?

In order to launch a product in the market, it has to be timely evaluated, whether a health technology assessment by the GBA (“Gemeinsamer Bundesausschuß” = Joint Federal Committee) is requested in order to enter the reimbursed market. Entering Germany first is also an important step in a well-considered price strategy in order to position the product in Europe.

BDG collaborates with renowned partners in this field and suggests to begin every project with a thorough review to check feasibility and chances.

Please feel free to contact us, in order to evaluate the right strategy for your Market Access in Germany.



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