

Structures and innovations

MEDICAL TECHNOLOGY IN GERMANY

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ABOUT US



***Export
Promotion***



***Investor
Consulting***



***Location
Marketing***

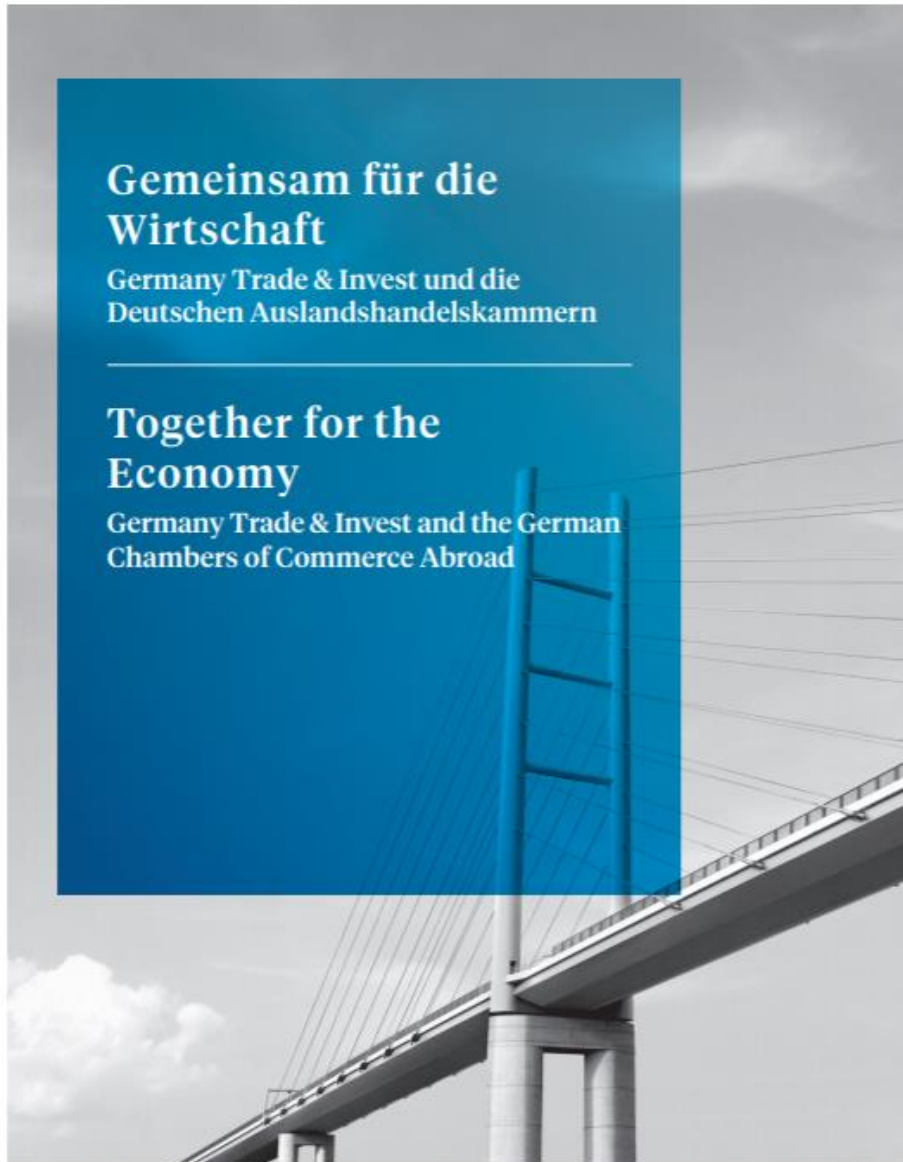


***New Federal
States & Structural
Transformation***

GTAI and AHKs complement each other

... and work closely together
worldwide:

- Joint offices abroad
- Close cooperation in export promotion, location marketing and investment attraction
- Joint conferences, events and webinars





HEALTHCARE SYSTEM IN GERMANY

Healthcare Market Germany

One of Germany's largest growth markets at a glance

EUR 387 billion
healthcare
expenditure

72 million people
have public health
insurance

1942 hospitals
500,000 beds

7 million people
employed in the
German
healthcare
industry

11.6%
of GDP

9 million people
privately insured

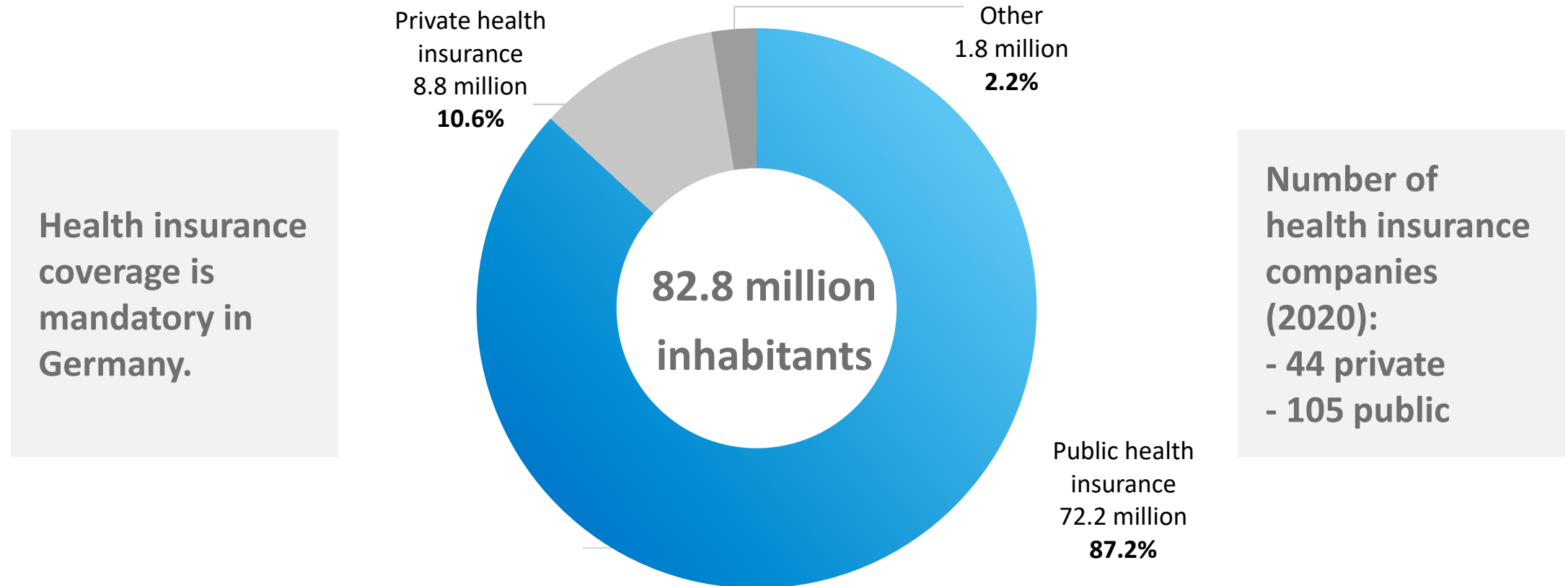
385,000
physicians

20,000
pharmacies

Source: Statistisches Bundesamt 2019; Bundesvereinigung Deutscher Apothekerverbände e.V. 2019, Pharmazeutische Zeitung 2019

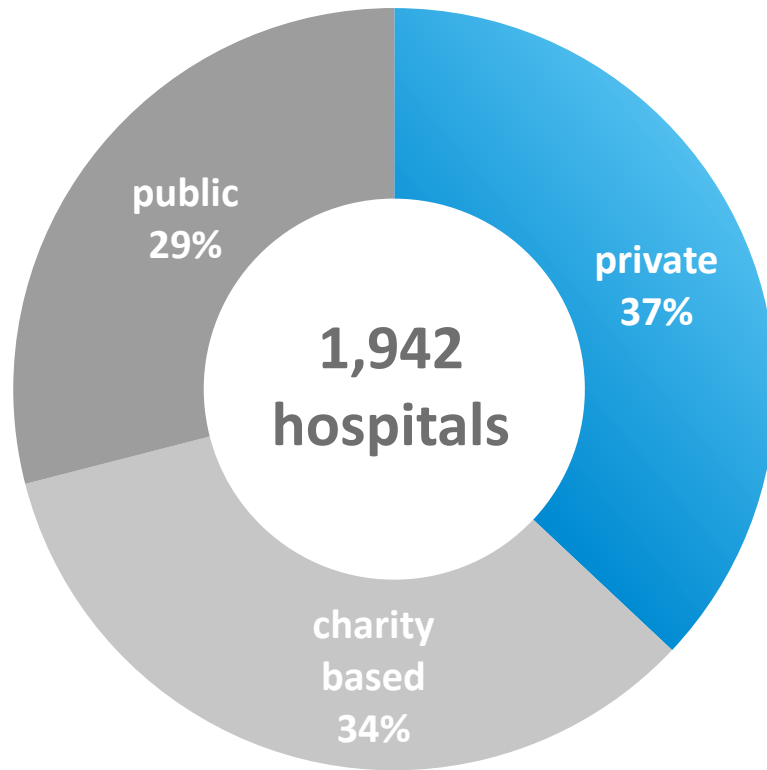
Health Insurance

Germany achieves almost universal health insurance coverage

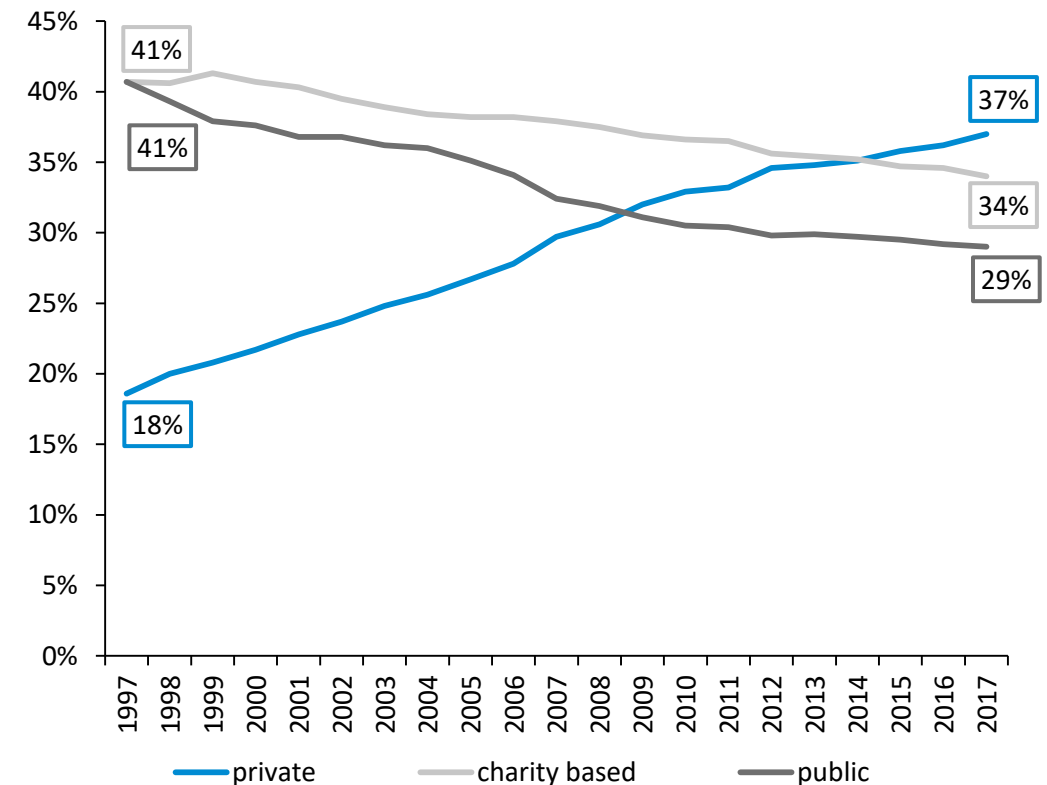


Number of Hospitals and Ownership

The share of privately owned hospitals continues to rise



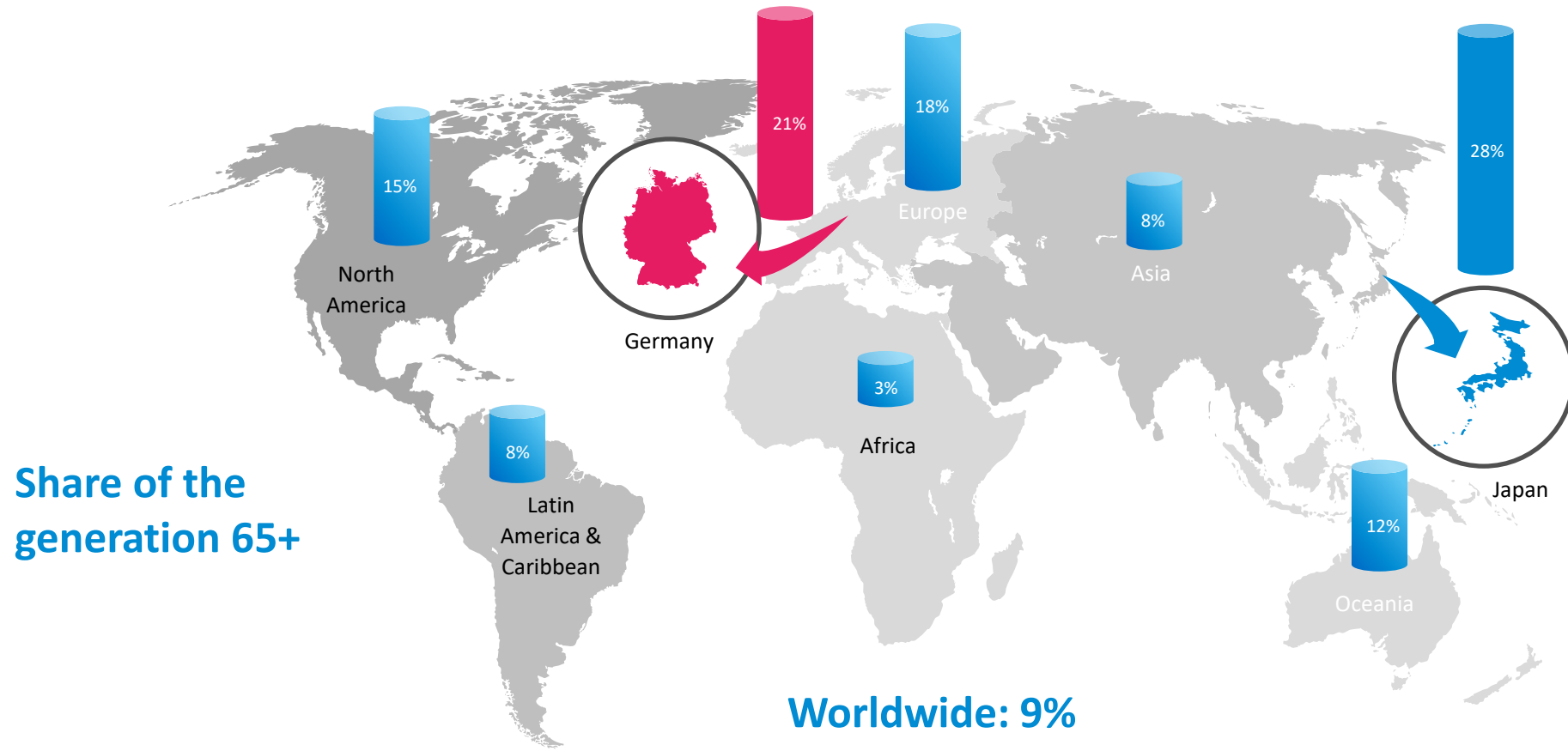
Source: German Hospital Federation 2018



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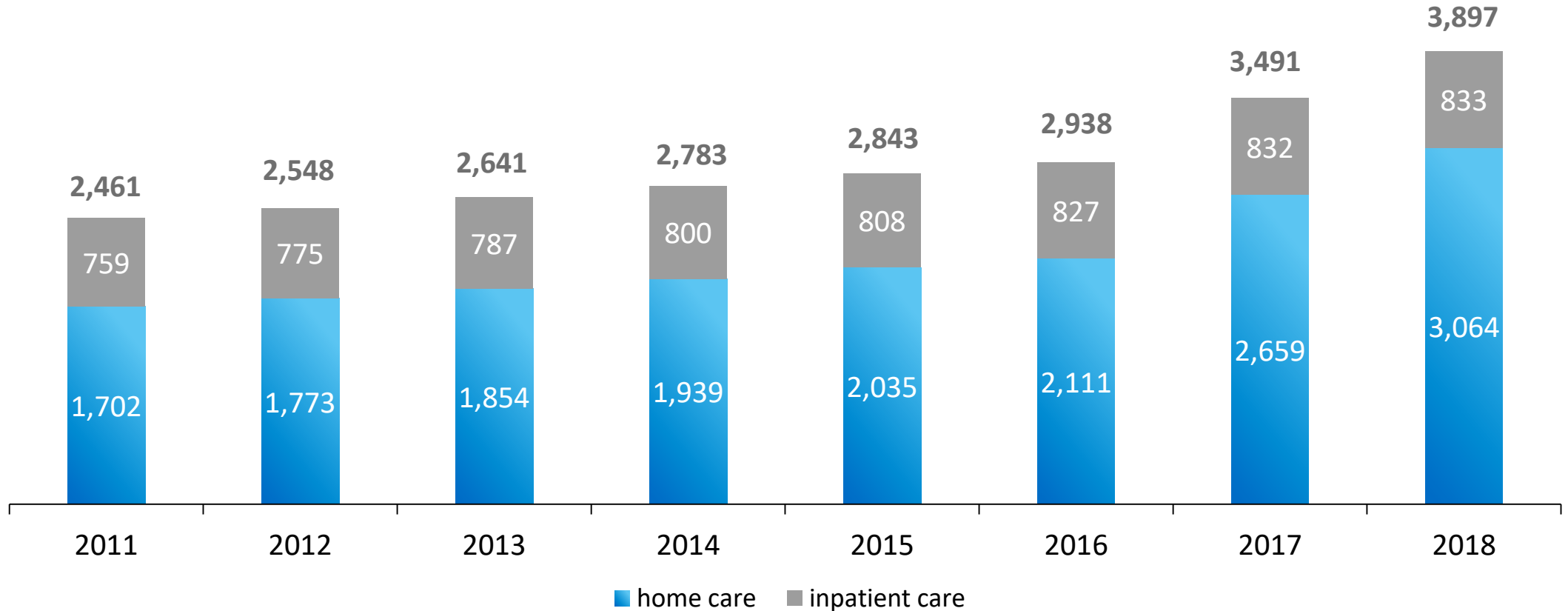
Demographic Change

The German population is one of the “oldest” worldwide



Care Recipients in Germany

Number of care recipients in Germany 2011 – 2018 (in thousands)





MEDICAL TECHNOLOGY SECTOR IN GERMANY

Medical technology clusters

More than 30 specialised networks

Berlin, Düsseldorf and Tuttlingen (near Freiburg) are some of the biggest medical technology hotspots in Germany.



Benefits through cooperation

Manufacturers, hospitals, universities and R&D institutes are working together along the value chain.



Networking in Covid-19 times

MedicalMountains in Tuttlingen has set up the Corona Hub platform to coordinate regional demand and supply.



Medical technology sales (Euro bn.)

	2017	2018	2019
Total sales	29.93	30.28	33.41
Domestic sales	10.85	10.49	11.46
Foreign sales	19.08	19.79	21.95

According to the sector association Spectaris, the export rate rose to 65.7% in 2019.




Opportunities and challenges

Spectaris is generally optimistic for the next years, but made no sales forecast for 2020.

Opportunities

-  Shift to digital and holistic solutions
-  Demographic development in mature economies
-  Rising health investment in emerging economies

Challenges

-  Economic consequences of Covid-19
-  Concerns about the new European Medical Device Regulation
-  Shortage of skilled workers expected



MEDICAL TECHNOLOGY TRENDS AND INNOVATIONS

Medical technology innovation landscape

More than 1.350 manufacturers are working in the medical technology sector in Germany – mostly SMEs



9%

of turnover
invested into R&D



15%

of employees
working in R&D



clusters

important
innovation
networks for SMEs



patents

most patent
applications of all
EU countries

Production

- Digitalisation and interconnectivity
- New materials (e.g. bio-based)
- Miniaturisation/microsystems
- New production methods (e.g. additive manufacturing)

Society

- Aging society (chronic diseases)
- More care dependency
- Rising health awareness

Most innovative segments

BVMed Innovation Climate Index 2019 (multiple answers possible)

- Cardiology and oncology (each 28 percent)
- Diagnostics (26 percent)
- Neurology (18 percent)
- Radiology (15 percent)



CONTACT US

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.

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