

MEDTECH MARKET ACCESS HIGHLIGHTS MEDICAL AIDS

**MEDICA 2024 GTAI PAVILION, WEDNESDAY, NOV. 13TH
12:00**

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Germany Trade & Invest (GTAI) is the international business promotion agency of the Federal Republic of Germany

A photograph of a city street scene. In the foreground, a yellow and white bus is blurred, moving from right to left. A person in a dark coat is walking across the street. In the background, there are several tall buildings. One is a curved glass skyscraper, another is a brick building, and a third is a modern building with a glass facade. The sky is clear and blue.

Knowledge about Germany as a Business Location

- Market and sector expertise
- Information on financing
- Tax and legal information

Healthcare Market Germany

**84.7
Million**

population in
Germany

**€495
Billion**

healthcare
expenditure

11.8%
of GDP

**8.3
Million**
employment in
health sector

88%
of people have
public health
insurance

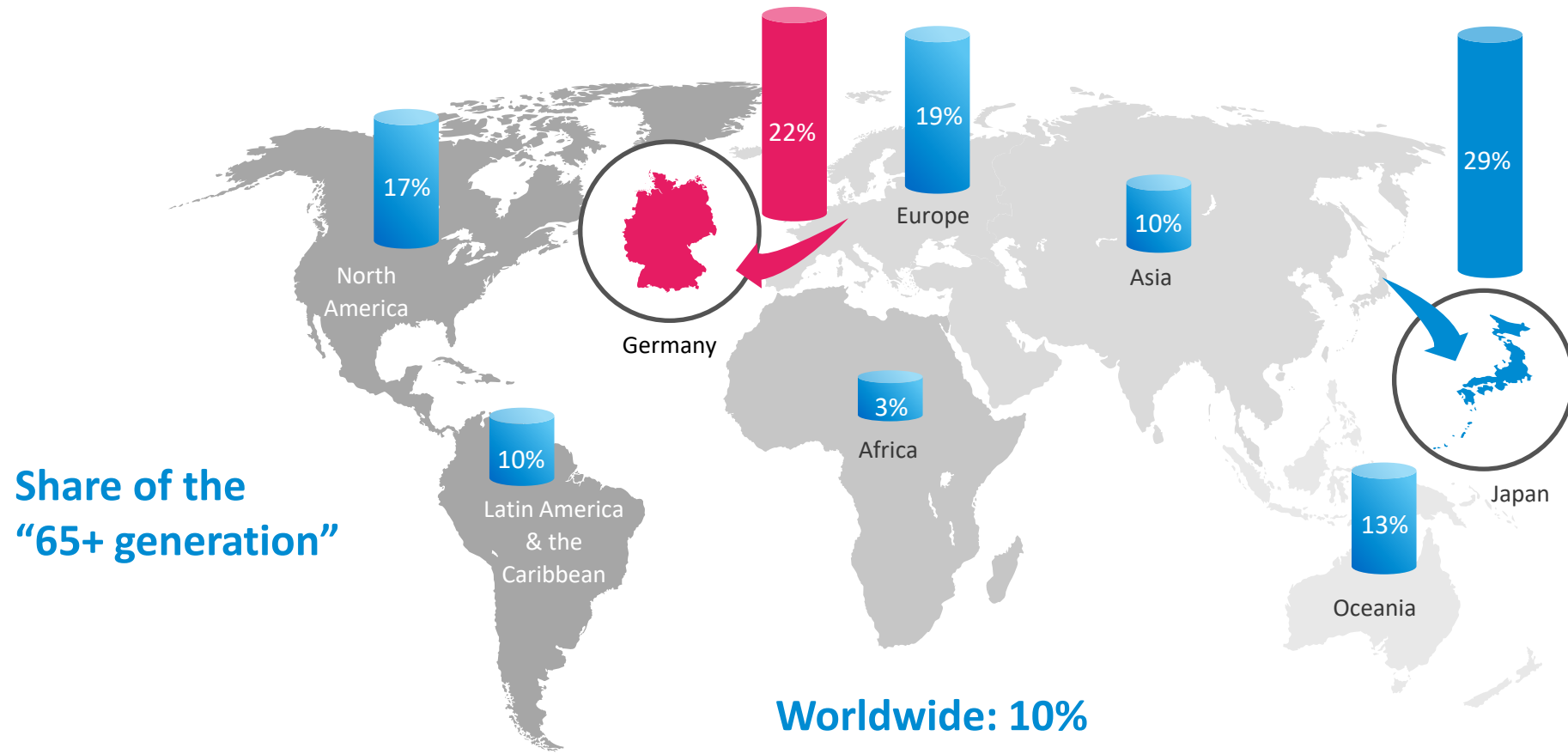
10%
privately
insured

1,870
hospitals
~477k
beds

17,300
pharmacies

Demographic Change

The German population is one of the “oldest” worldwide





High Prevalence of Chronic & Incommunicable Diseases

- Cardiovascular diseases
- Psychological disorders
- Musculoskeletal diseases
- Chronic lung diseases
- Cancer
- Metabolic and digestive disorders
- Diseases of the nervous system



Health Consciousness

- **Healthy** and active **life style**
- Willingness to **invest in** and spend money on one's **health** “out-of-pocket”
- **Prevention**

Medtech is in high demand

€42 bn

Market volume 2023

1480

Manufacturers (20+ empl.)

2/3

Exports: „Made in Germany“ sells

1374

Leading patent applications at EPO

€23 bn

Imports: high demand (2022)

CE

Medical Device Regulation (MDR)

The German Medical Aids Market

A wide range of assistive devices and mobility equipment



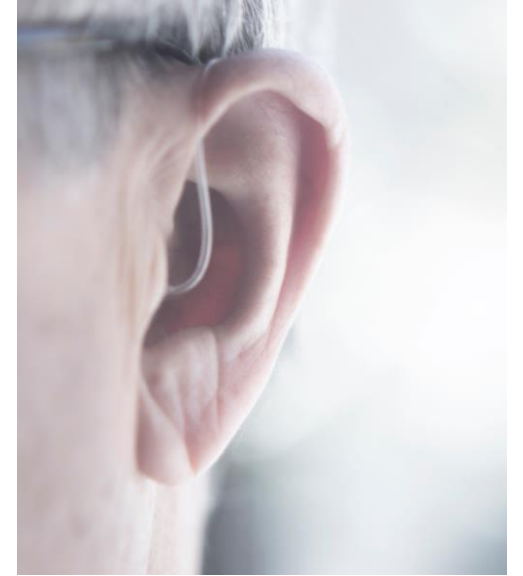
**Prostheses and
orthoses**



**Walking aids and
wheelchairs**



Visual aids

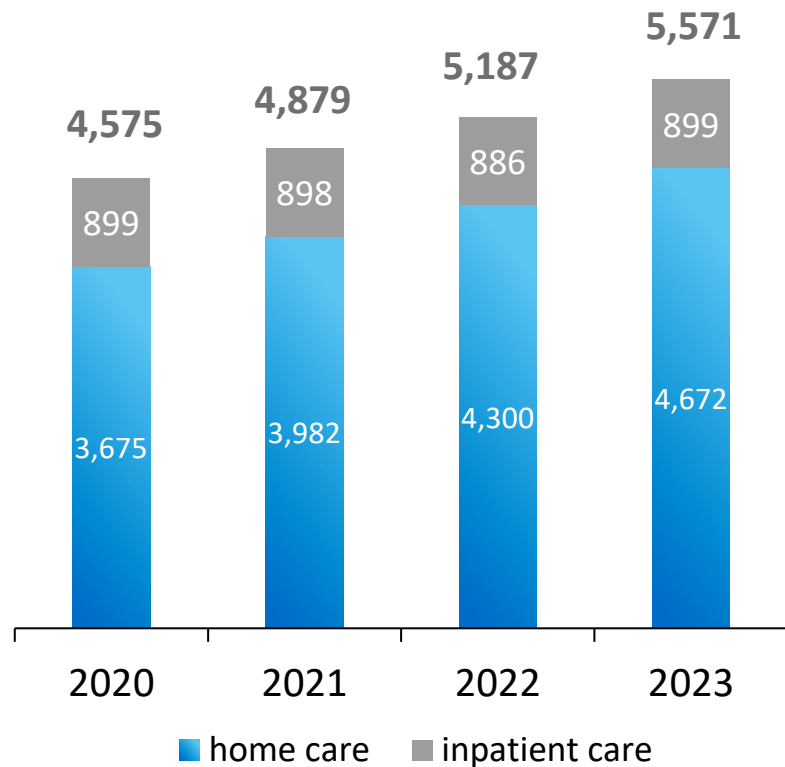


Hearing aids

Note: The listed product categories are only examples.

The Medical Aids Market in Germany

Number of care recipients in Germany 2020 – 2023 (in thousands)



Source: German Federal Ministry of Health 2023

Market volume of medical aids in Germany 2023

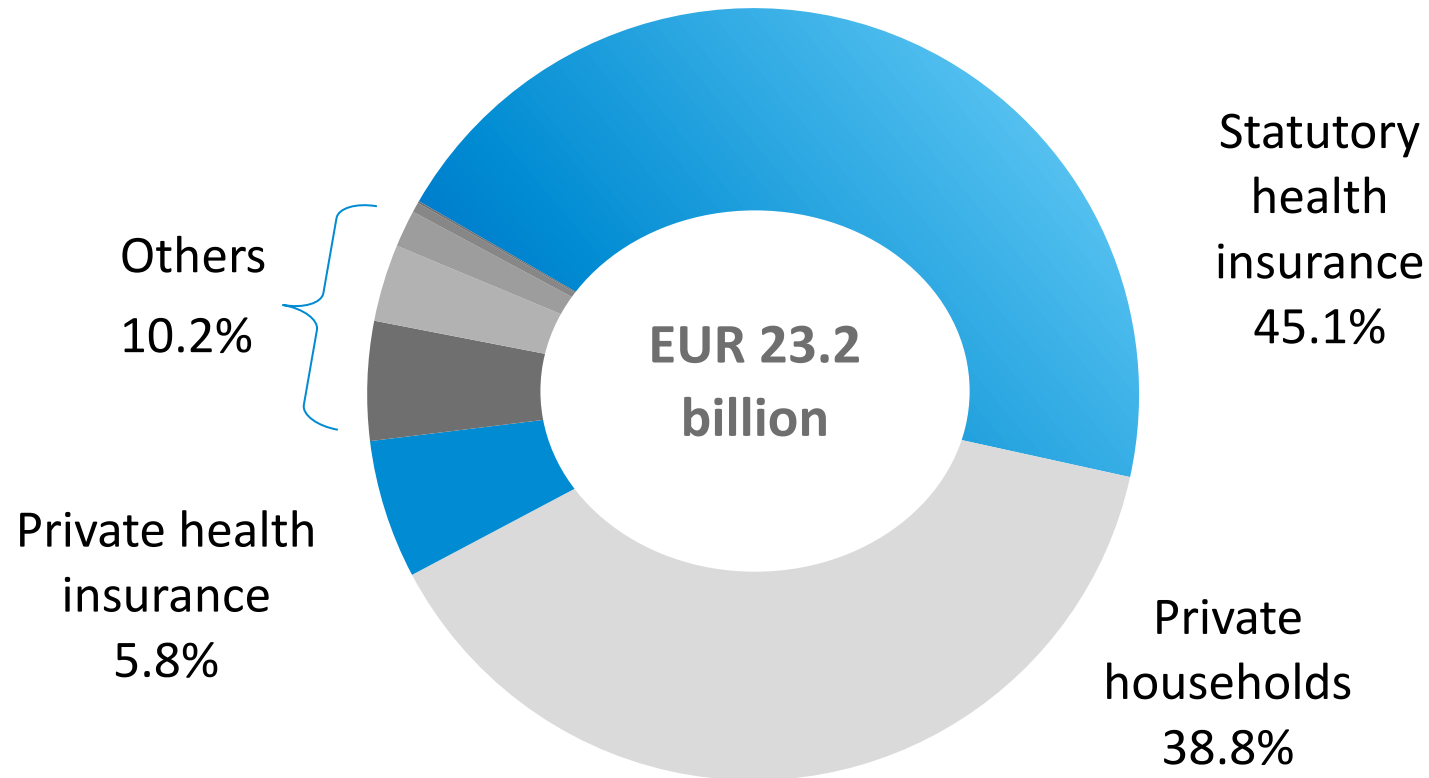


GKV Spitzenverband 2024

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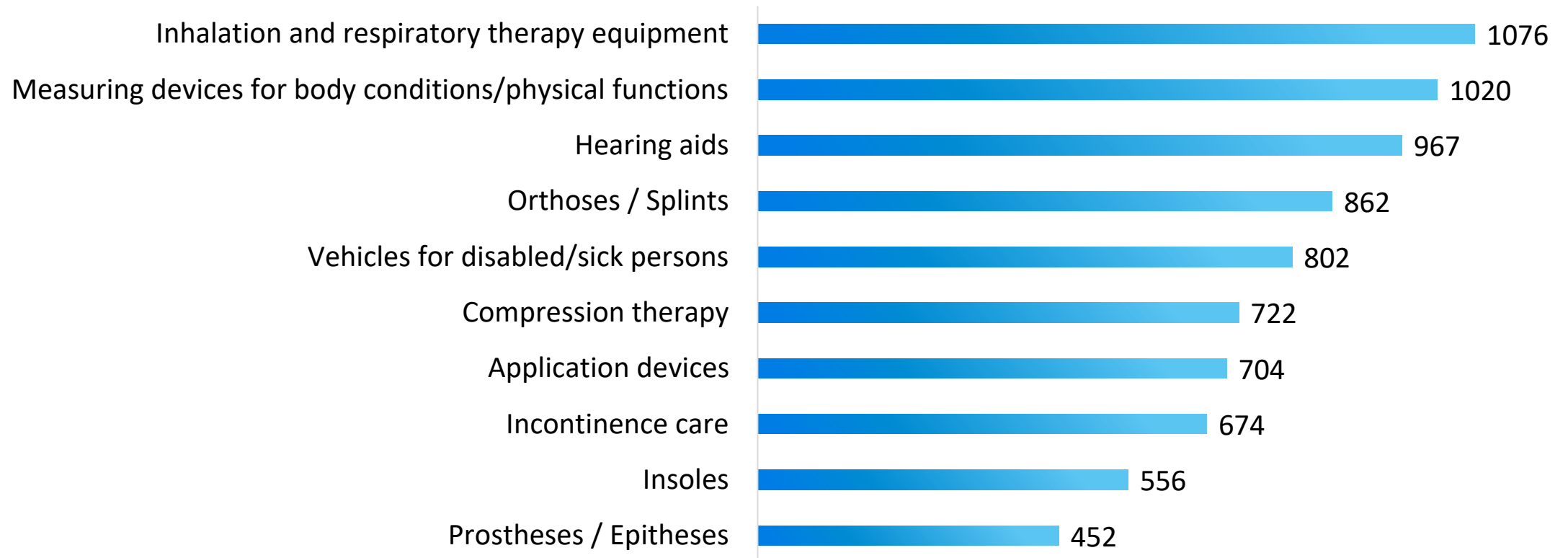
The German Medical Aids Market

More than 80% of costs are covered by statutory health insurance companies and private households.



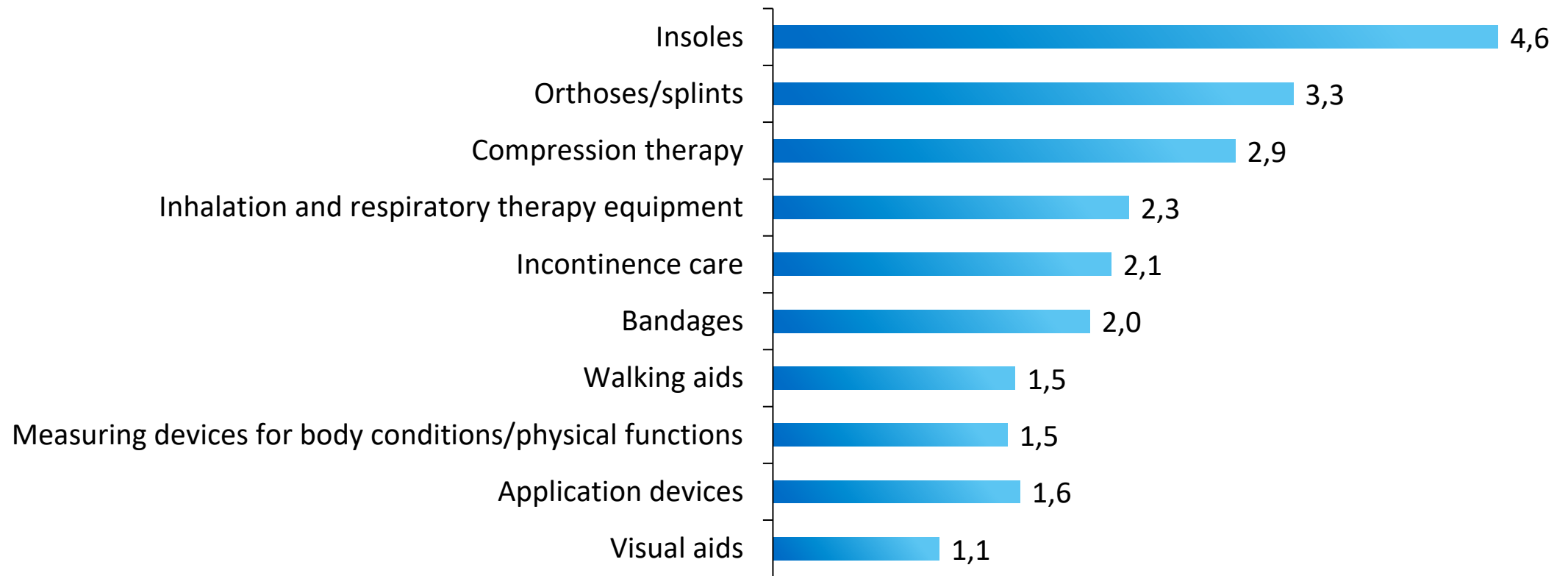
The German Medical Aids Market

Leading product groups in terms of spending by statutory health insurance (GKV)
(in EUR million)



The German Medical Aids Market

Leading product groups in terms of patient numbers by statutory health insurance (GKV)
(in million)



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SUPPORTED BY THE FEDERAL MINISTRY FOR ECONOMIC AFFAIRS AND ENERGY
ON THE BASIS OF A DECISION BY THE GERMAN BUNDESTAG.

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