

# GERMANY'S HEALTHCARE MARKET

TRENDS AND MARKET OPPORTUNITIES

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Dr. Marcus C. Schmidt  
Director Chemicals & Healthcare

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



# 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**

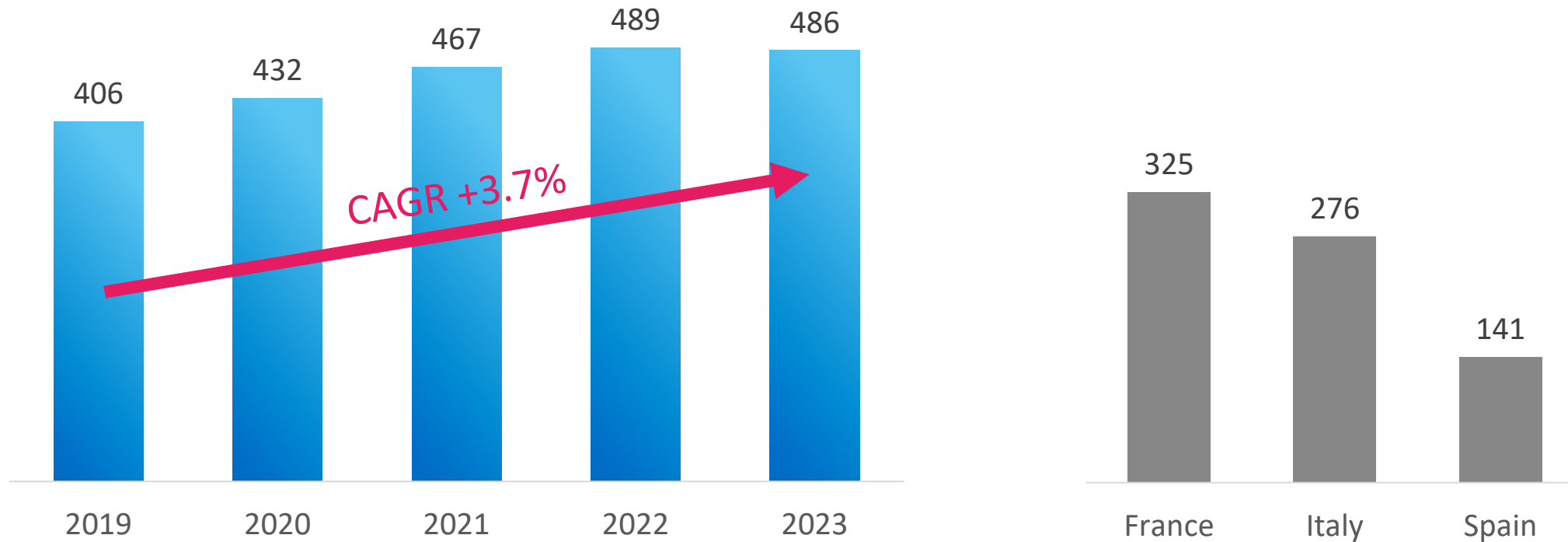
beds

**17,300**

pharmacies

# Germany is the largest HC market in Europe

Healthcare spending in Europe (in € Billion)

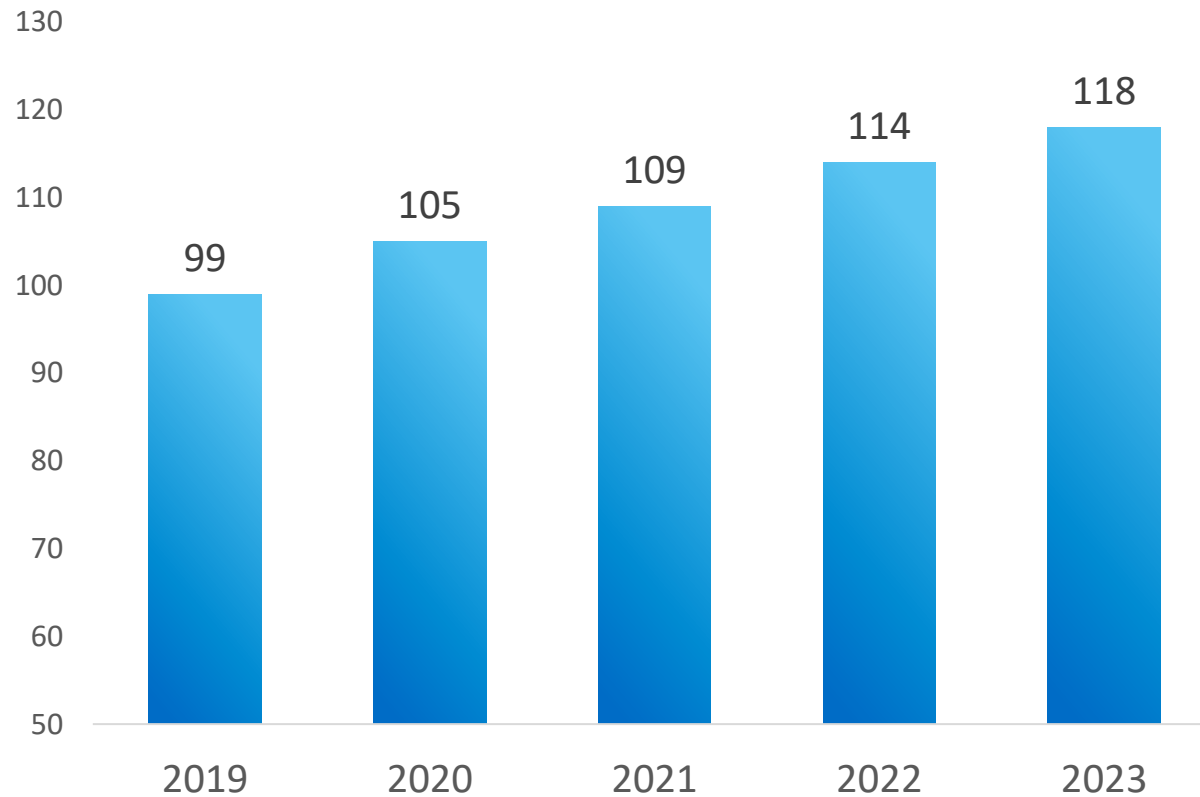


Source: OECD 2024

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# Hospital spending continues to increase

Total spending of German hospitals 2019 – 2023 (in € Billion)

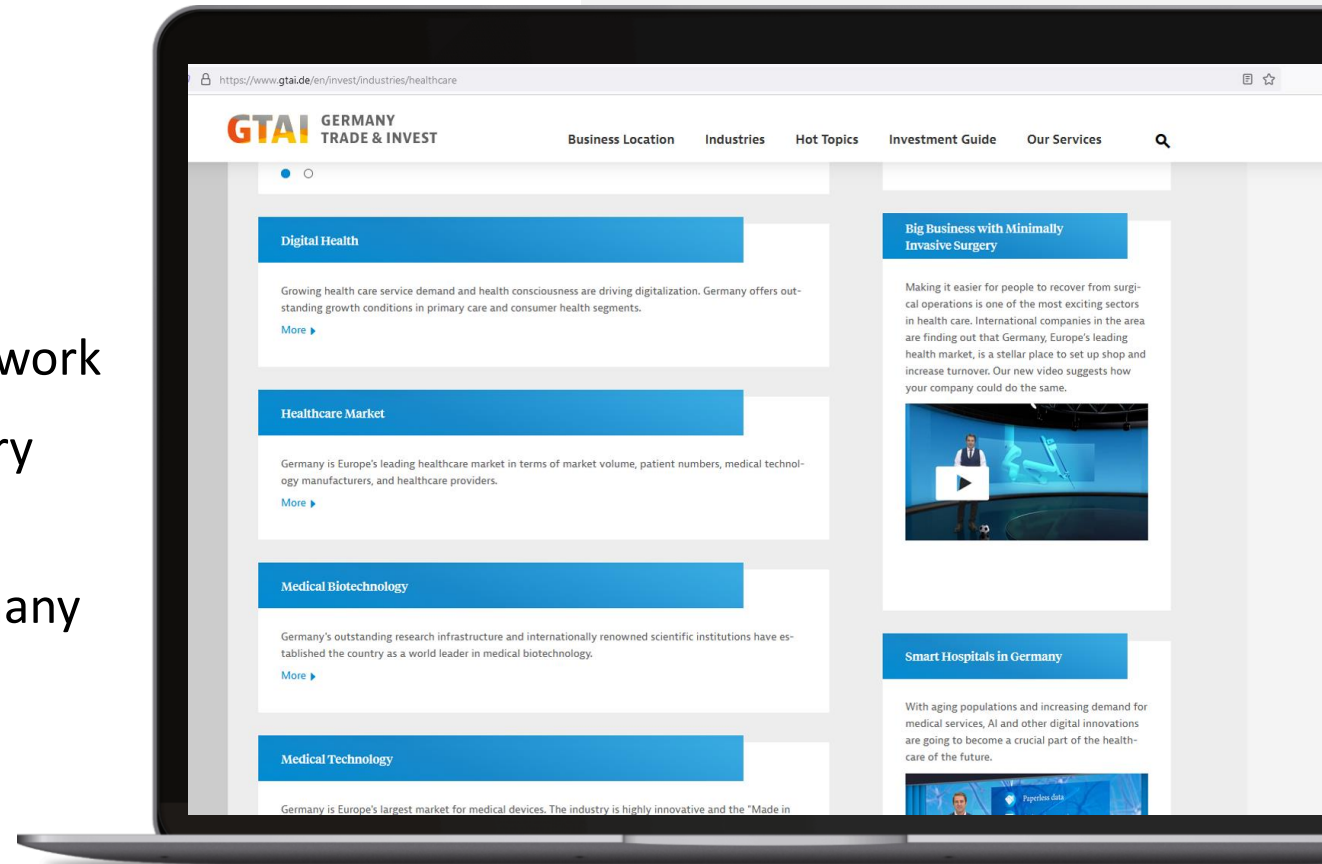


Average cost per case increased to € 6,769

# 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 2024



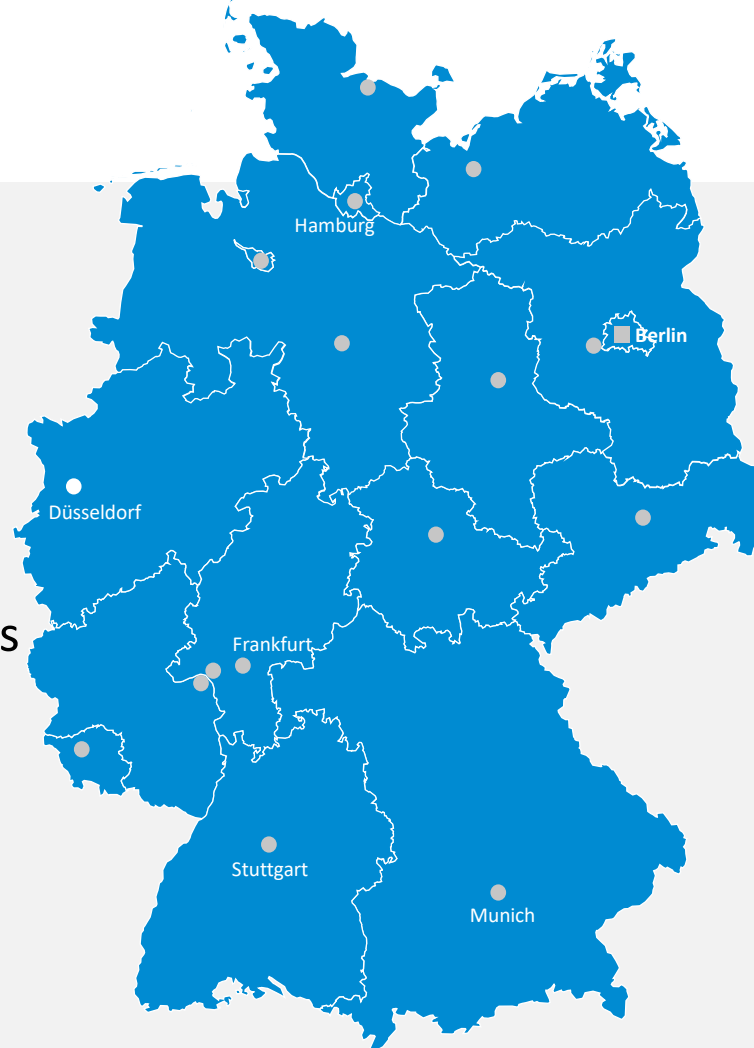
500,000+ different  
medical devices



1,480+ manufacturers  
(w. 20+ employees)  
12,000 small companies  
93% SME



265,000 employees



€ 42B market volume



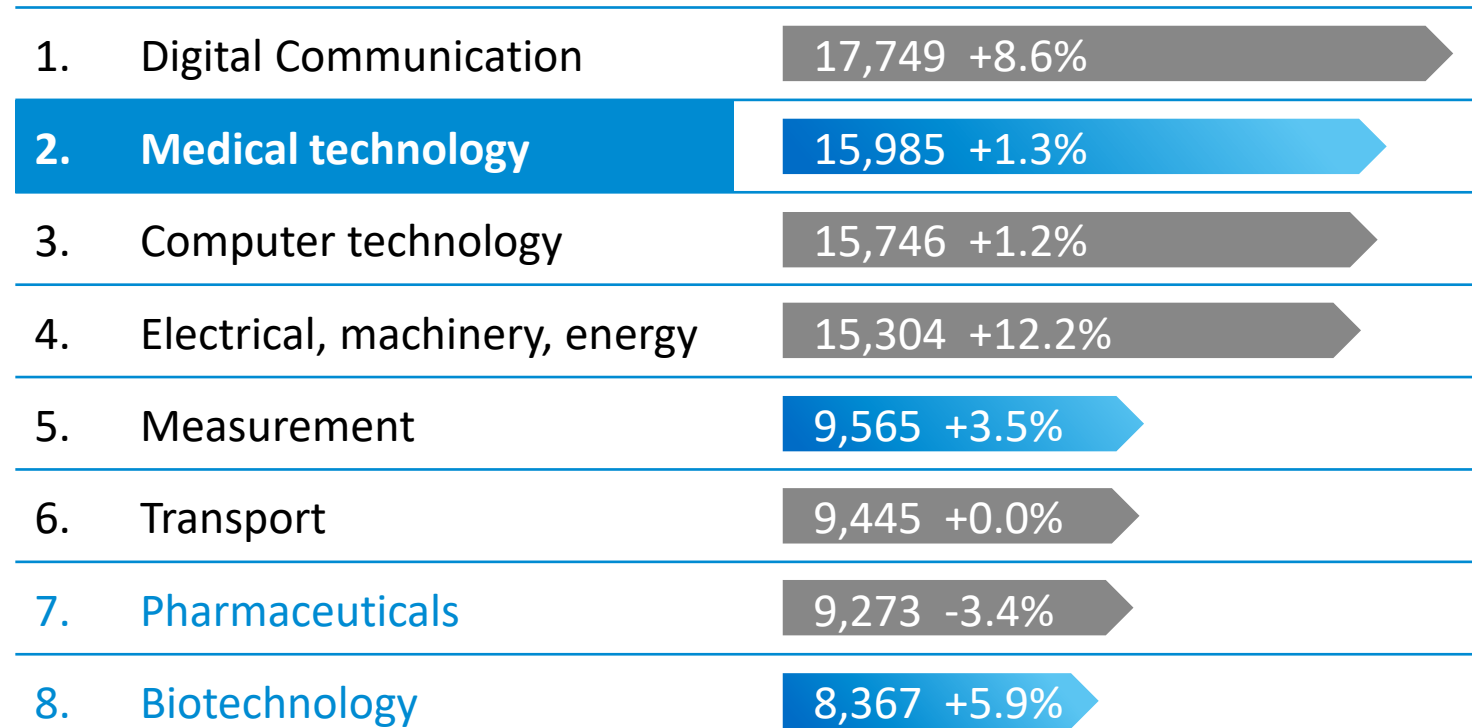
68% of products made  
in Germany exported.  
Imports: € 23B



9% of revenue spent  
on R&D

# Healthcare is among the most innovative industry sectors

## Number of applications at European Patent Office 2023 (vs 2022)



Source: European Patent Office: [www.epo.org](http://www.epo.org)





# Germany is Europe's leader in healthcare patent applications

Country	Med. Dev.	Pharma	Biotech	Sum
USA	17,876	10,925	8,076	36,868
<b>Germany</b>	<b>4,177</b>	<b>1,932</b>	<b>2,346</b>	<b>8,455</b>
Japan	3,057	1,545	1,578	6,180
Switzerland	3,035	1,590	1,291	5,916
France	2,210	1,501	1,438	5,149
China	1,846	1,465	1,621	4,932
Netherlands	2,551	729	734	4,014
Utd Kingdom	1,429	945	1,051	3,425

*Note: combined numbers for 3Y: 2021-2023; Source: European Patent Office, 2024*

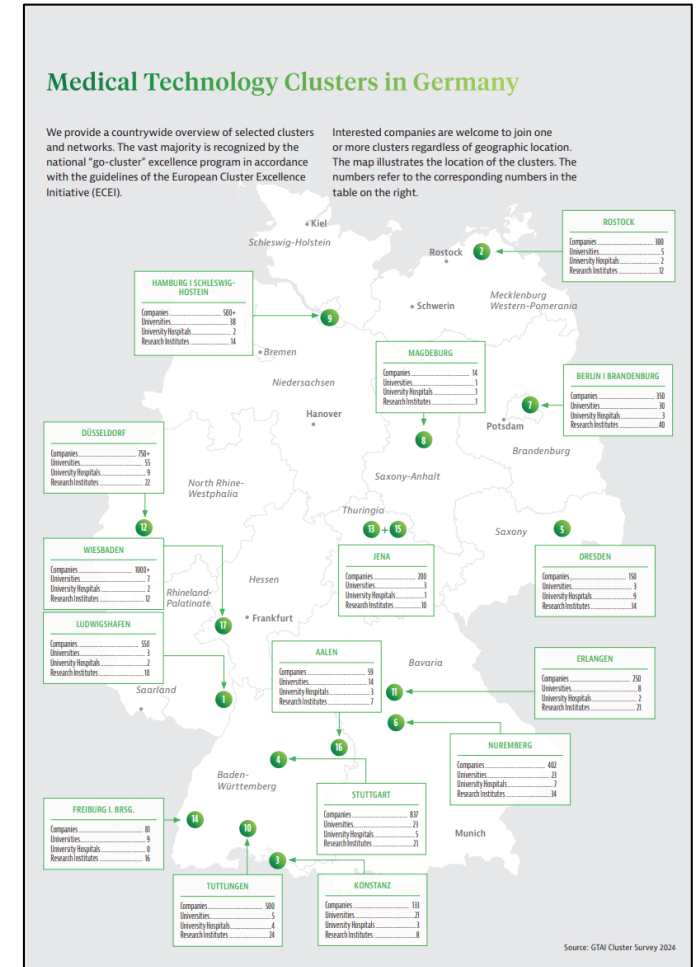


# Germany's Medical Technology Clusters

## GTAI Innovation Cluster Survey 2024

### Key networks facts & figures:

- 17 networks in survey, 13 with certification
- 3000+ member companies
- 250+ research institutes
- 200+ universities
- 36 member university hospitals



# Key trends and market applications include

Artificial Intelligence (AI) →



LabTech

Smart (Connected) Systems →



Diagnostics

Miniaturization →



Rehab

New Materials →



Imaging & MIS



Telemed / Apps

# Monday

# 16:00

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Hall 14 | H03

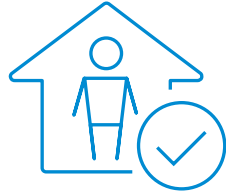
# Medical Device Market Access

Gabriel Flemming, Deputy Director Healthcare, GTAI

Dr. Tobias Volkwein, Specialized Attorney for Medical Law, D+B

# Reimbursement pathways in Germany

## Two reimbursement settings



### Ambulatory sector (out-patient)

- Doctor's office: reimbursed if listed in uniform evaluation standard (EBM)
- Medical supply stores: reimbursed if listed in medical aids register (HMV: GKV Spitzenverband)
- Joint Federal Committee (G-BA)



### Hospital sector (in-patient)

- Long-term use equipment: hospital budget
- Short-term use on individual patients: procedures reimbursed within G-DRG system unless barred
- Joint Federal Committee (G-BA)

# Tuesday

# 12:00

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# Digital Health Market Germany

Julia Pietsch, Senior Manager Healthcare, GTAI

Serap Konak, Senior Consultant, Flying Health

Marco Wendel, Member of the Board, Medical Valley EMN © GTAI 13



# 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

# 14:00

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# MDR-Update

Gabriel Flemming, Deputy Director Healthcare, GTAI

Meinrad Kempf, Cluster Manager, Medical Mountains Tuttlingen



# CE certification

## MDR is in effect but under construction

- Certification of Notified Bodies, legacy and new products
- White-Paper by associations BVMed and VDGH (June 2023)
- EU representatives visit cluster Medical Mountains (June 2024)
- European Parliament resolution „Urgent need to revise the medical devices regulation” (October 2024)



# Tuesday, 5pm

# Networking Reception @ GTAI



# Wednesday, Nov. 13

# 12:00

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## Market Access Medical Aids

Nadine Litchfield, Senior Manager Healthcare, GTAI

Dr. Madeleine Künz, Senior Consultant, KALMS Consulting

## OVERVIEW ALL PRESENTATIONS @ GTAI (14 H03)

### MONDAY

4:00 – 5:00 pm

**Medtech Market Access**

### TUESDAY

12:00 – 12:45 pm

**Digital Health in Germany**

2:00 – 3:00 pm

**MDR-Update**

5:00 – 7:00 pm

**International Networking Reception  
w. partner countries Canada, Portugal, Rep. of Korea**

### WEDNESDAY

12:00 – 13:00 pm

**Medtech Market Access – Highlight Medical Aids**

## 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.de/medica](http://www.gtai.de/medica)**