The Pharmaceutical Industry in Germany

Pharmaceutical companies: 817 (as per trade registries)
Biotechnology companies: 570
Manufacturing: 29.0 billion Euros (+4.8% compared to 2012)
Pharmaceutical exports: 57.1 billion Euros (+5.4% compared to 2012)

Main importers:
USA: 8.5 billion Euros
Netherlands: 6.5 billion Euros
Great Britain: 5.1 billion Euros
Switzerland: 3.7 billion Euros

Employees: 110,036*

R&D expenditures as percentage of turnover in 2012: 13.2% (Ranked No. 1 in Germany)

The Global Pharmaceutical Market**

Total market: 720.0 billion Euros (+2.4% compared to 2012)

North America: 265.3 billion Euros (+3.2% compared to 2012)
EU: 189.6 billion Euros (+5.6% compared to 2012)
Japan: 69.1 billion Euros (-16.1% compared to 2012)
Asia, Africa, Australasia***: 209.4 billion Euros (-1.5% compared to 2012)
Latin America: 55.7 billion Euros (+3.1% compared to 2012)

Data presented by BPI based on data of IMS World Review 2014.

Pharmaceuticals in the German Statutory Health Insurance System

Total SHI expenditures: 194.5 billion Euros (+5.5% compared to 2012)
SHI expenditures for pharmaceuticals: 30.3 billion Euros (+3.8% compared to 2012)
% of pharmaceuticals of total expenditures: 15.6%

* New statistic implemented by the Federal Statistical Office in 2010.
** No comparison to previous years available.
*** The region “Asia, Africa, Australasia” includes the values for Japan.
The German Pharmacy Market

Total turnover in the pharmacy market
(based on manufacturer price): 28.2 billion Euros
(+5.6 % compared to 2012)

Prescription-only drugs: 22.5 billion Euros (+5.9 %)
Pharmacy-only drugs: 3.1 billion Euros (+5.5 %)

Top 10 leading indications (ATC-3) in the SHI market 2013 by turnover

<table>
<thead>
<tr>
<th>Indication areas (ATC-3)</th>
<th>In million Euros</th>
<th>% to previous year</th>
<th>% share of total volume</th>
<th>% share of total turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>33,654.4</td>
<td>3.80</td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>L04B Anti-TNF preparations</td>
<td>1,604.8</td>
<td>13.56</td>
<td>4.77</td>
<td>0.06</td>
</tr>
<tr>
<td>A10C Human insulin and analogs</td>
<td>1,287.3</td>
<td>3.27</td>
<td>3.82</td>
<td>1.76</td>
</tr>
<tr>
<td>N02A Analgesics, narcotics</td>
<td>1,018.2</td>
<td>0.31</td>
<td>3.03</td>
<td>1.11</td>
</tr>
<tr>
<td>L04X Other immunosuppressants</td>
<td>977.8</td>
<td>15.31</td>
<td>2.91</td>
<td>0.26</td>
</tr>
<tr>
<td>L01H Antineoplastic protein kinase inhibitors</td>
<td>955.3</td>
<td>20.26</td>
<td>2.84</td>
<td>0.03</td>
</tr>
<tr>
<td>N05A Antipsychotics</td>
<td>876.3</td>
<td>-9.80</td>
<td>2.60</td>
<td>1.78</td>
</tr>
<tr>
<td>L03B Interferons</td>
<td>875.8</td>
<td>3.86</td>
<td>2.60</td>
<td>0.05</td>
</tr>
<tr>
<td>N03A Antiepileptics</td>
<td>866.3</td>
<td>3.06</td>
<td>2.57</td>
<td>1.48</td>
</tr>
<tr>
<td>J05C Antivirals for the treatment of HIV</td>
<td>853.3</td>
<td>7.90</td>
<td>2.54</td>
<td>0.11</td>
</tr>
<tr>
<td>T02D Diabetes tests</td>
<td>842.8</td>
<td>-4.42</td>
<td>2.50</td>
<td>3.58</td>
</tr>
</tbody>
</table>

Source: Illustration of the BPI based on data of Insight Health 2014.

Pharmaceutical Drug Prices

Development of drug prices in SHI system: + 0.1 % (compared to 2012)

Unless otherwise specified, the data presented here refer to the year 2013. Sources and more in-depth information are found in the publication “Pharma-Data 2014”.

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