The Pharmaceutical Industry in Germany

Pharmaceutical companies: 643 (according to the Federal Statistical Office)
Biotechnology companies: 579
Manufacturing: 30.4 billion Euros (+ 4.8 % compared to 2013)
Pharmaceutical exports: 61.4 billion Euros (+ 7.5 % compared to 2013)

Main importers:
USA: 10.6 billion Euros
Netherlands: 6.2 billion Euros
Great Britain: 6.0 billion Euros
Switzerland: 4.1 billion Euros

Employees: 112,475

R&D expenditures as percentage of turnover in 2013: 12.7 %

The Global Pharmaceutical Market*

Total market: 846.4 billion Euros (+ 6.4 % compared to 2013)
North America: 322.5 billion Euros (+ 12.0 % compared to 2013)
EU: 213.8 billion Euros (+ 4.0 % compared to 2013)
Japan: 70.5 billion Euros (+ 1.0 % compared to 2013)
Asia, Africa, Australasia**: 246.8 billion Euros (+ 6.0 % compared to 2013)
Latin America: 63.1 billion Euros (+ 17.0 % compared to 2013)

Data presented by BPI based on data from IMS World Review 2015.

Pharmaceuticals in the German Statutory Health Insurance System

Total SHI expenditures: 205.5 billion Euros (+ 5.7 % compared to 2013)
SHI expenditures for pharmaceuticals: 33.4 billion Euros (+ 10.2 % compared to 2013)
% of pharmaceuticals of total expenditures: 16.2 %

* The Euro values are based on a recalculation of the market data of the base values in US Dollars (Exchange rate: USD in Euro = 1.249 : 1).
** The region "Asia, Africa, Australasia" includes the values for Japan.
The German Pharmacy Market

Total turnover in the pharmacy market
(based on manufacturer price): 29.4 billion Euros
(+ 4.3 % compared to 2013)

Prescription-only drugs: 23.7 billion Euros (+ 5.58 %)
Pharmacy-only drugs: 3.0 billion Euros (- 1.7 %)

Top 10 leading indications (ATC-3) in the SHI market 2014 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>35,736.2</td>
<td>6.18</td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>L04B Anti-TNF preparations</td>
<td>1,818.0</td>
<td>13.28</td>
<td>5.09</td>
<td>0.06</td>
</tr>
<tr>
<td>A10C Human insulin and analogs</td>
<td>1,342.2</td>
<td>4.27</td>
<td>3.76</td>
<td>1.78</td>
</tr>
<tr>
<td>L04X Other immunosuppressants</td>
<td>1,156.1</td>
<td>19.70</td>
<td>3.24</td>
<td>0.27</td>
</tr>
<tr>
<td>L01H Antineoplastic protein kinase inhibitors</td>
<td>1,033.9</td>
<td>8.23</td>
<td>2.89</td>
<td>0.03</td>
</tr>
<tr>
<td>N02A Analgesics, narcotics</td>
<td>1,033.1</td>
<td>1.46</td>
<td>2.89</td>
<td>1.14</td>
</tr>
<tr>
<td>J05C Antivirals for the treatment of HIV</td>
<td>913.7</td>
<td>7.08</td>
<td>2.56</td>
<td>0.11</td>
</tr>
<tr>
<td>N03A Antiepileptics</td>
<td>872.2</td>
<td>0.69</td>
<td>2.44</td>
<td>1.54</td>
</tr>
<tr>
<td>T02D Diabetes tests</td>
<td>860.2</td>
<td>2.07</td>
<td>2.41</td>
<td>3.69</td>
</tr>
<tr>
<td>N05A Antipsychotics</td>
<td>858.0</td>
<td>- 2.06</td>
<td>2.40</td>
<td>1.81</td>
</tr>
<tr>
<td>N06A antidepressants and mood stabilisers</td>
<td>846.2</td>
<td>4.63</td>
<td>2.37</td>
<td>3.07</td>
</tr>
</tbody>
</table>

Illustration of the BPI based on data of Insight Health 2015.

Pharmaceutical Drug Prices

Development of drug prices in SHI system: - 1.5 % (compared to 2013)

Unless otherwise specified, the data presented here refer to the year 2014. Sources and more in-depth information are found in the publication “Pharma-Data 2015”.

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