

Pharma-Data 2016 Compact

The pharmaceutical industry in Germany

Pharmaceutical companies:	669 (according to the Federal Statistical Office)
Biotechnology companies:	593 (one in two active in the healthcare sector)
Pharma production:	29.55 billion euros (-2.84% compared with 2014)
Pharmaceutical exports:	69.7 billion euros (+13.6% compared with 2014)
Main export customers:	
USA:	13.5 billion euros
Netherlands:	8.2 billion euros
UK:	7.1 billion euros
Switzerland:	4.7 billion euros
Employees:	114,069
Proportion of turnover spent on internal R&D in 2014:	12,5 %

The global pharmaceutical market*

Total market:	978.6 billion euros (+9.0% compared with 2014)
North America:	416.6 billion euros (+11.0% compared with 2014)
EU:	217.2 billion euros (+7.0% compared with 2014)
Japan:	74.3 billion euros (+6.0% compared with 2014)
Asia, Africa, Australasia**:	278.8 billion euros (+7.0% compared with 2014)
Latin America:	66.0 billion euros (+19.0% compared with 2014)

BPI's own presentation, based on data from IMS World Review 2016.

Medicines in the German statutory health insurance system (GKV)

Total GKV expenditure:	213.67 billion euros (+4.0% compared with 2014)
GKV expenditure	
Medicines:	33.84 billion euros (+4.3% compared with 2014)
as a percentage of total expenditure:	16.3%

* The figures in euros were obtained by converting the market data with base values in US dollars (conversion rate: 1 euro = 1.0954238 dollars). Change compared with previous year based on LCD (Local Currency Dollar) – currency fluctuations in countries are not taken into account. In this way, growth can be compared between countries.

** The 'Asia, Africa, Australasia' region includes the values for the 'Japan' sub-segment.

The German pharmacy market

Pharmacy market turnover

(based on manufacturer price):	30.5 billion euros
	(+3.5% compared with 2014)
of which prescription drugs:	24.7 billion euros (+3.9%)
of which drugs restricted to pharmacies:	3.1 billion euros (+3.7%)

TOP 10 leading indication areas (ATC-3) on the GKV market, 2015 according to turnover

Indication areas (ATC-3)	million euros	% against previous year	% share of total turnover	% share of total volume
Total	37,501.8	4.94	100.00	100.00
L04B Anti-TNF preparations	1,967.1	8.20	5.25	0.07
J05B Antiviral agents, excluding against HIV	1,495.9	82.65	3.99	0.17
A10C Human insulin and analogues	1,378.8	2.72	3.68	1.79
L01H Antineoplastic protein kinase inhibitors	1,198.2	15.90	3.20	0.04
N02A Analgesics, narcotics	1,029.0	- 0.39	2.74	1.15
L04X Other immunosuppressants	984.9	11.75	2.63	0.25
J05C Antivirals agents against HIV	927.4	1.50	2.47	0.10
T02D Diabetes tests	850.2	- 1.16	2.27	3.69
N06A antidepressants and mood stabilisers	818.6	- 3.26	2.18	3.08
B01F Direct factor Xa inhibitors	810.8	44.69	2.16	0.51

BPI's own presentation, based on data from Insight Health 2016.

Medicine prices

Development of GKV medicine prices

in the first six months of 2016: -1.7% (compared with 2015)

Unless otherwise indicated, the figures compiled here relate to 2015. For information on sources and further material on data, please refer to 'Pharma Data 2016'.



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