

Pharma-Data 2017 Compact

The pharmaceutical industry in Germany

Pharmaceutical companies:	554 (according to the Federal Statistical Office)
Biotechnology-companies:	615 (one in two active in the healthcare sector)
Pharma production:	29.2 billion euros (- 1.2 % compared with 2015)
Pharmaceutical exports:	70.6 billion euros (+ 1.3 % compared with 2015)
Main export customers:	
USA:	12.9 billion euros
The Netherlands:	8.0 billion euros
UK:	6.3 billion euros
Switzerland:	6.3 billion euros
Staff:	128,545
Proportion of turnover spent on internal R&D in 2015:	11.3 %

The global pharmaceutical market*

Total market:	1,024.6 billion euros (+ 3.6 % compared with 2015)
North America:	446.9 billion euros (+ 6.0 % compared with 2015)
EU:	224.8 billion euros (+ 4.0 % compared with 2015)
Japan:	82.2 billion euros (+ 12.0 % compared with 2015)
Asia, Africa, Australasia**:	299.3 billion euros (+ 5.0 % compared with 2015)
Latin America:	53.5 billion euros (+ 42.0 % compared with 2015)

BPI's own presentation, based on data from IMS World Review 2017.

Medicines in the German statutory health insurance system (GKV)

Total GKV expenditure:	222.73 billion euros (+ 4.3 % compared with 2015)
GKV expenditure	
Medicines:	36.27 billion euros (+ 4.1 % compared with 2015)
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 = 1.07868503 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): 31.4 billion euros
(+ 3.0 % compared with 2015)
of which prescription drugs:: 25.6 billion euros (+ 3.6 %)
of which drugs restricted to pharmacies: 3.1 billion euros (- 0.2 %)

TOP 10 leading indication areas (ATC-3) on the GKV market, 2016 according to turnover

Indication areas (ATC-3)	million euros	% against previous year	% share of total turnover	% share of total volume
Total	38,676.6	3.13	100.00	100.00
L04B Anti-TNF preparations	2,127.5	8.15	5.50	0.07
N07A Multiple sclerosis drugs	1,730.9	- 0.91	4.48	0.08
A10C Human insulin and analogues	1,394.7	1.15	3.61	1.76
L01X Antineoplast. protein kinase inhibit.	1,385.2	15.61	3.58	0.04
B01F Direct factor Xa inhibitor	1,070.9	32.09	2.77	0.65
N02A Analgesics, narcotics	1,061.7	3.18	2.75	1.18
J05B Antiviral agents, excluding against HIV	961.8	- 35.71	2.49	0.16
J05C Antivirals for the treatment of HIV	961.5	3.68	2.49	0.09
L04X Other immunosuppressants	899.0	11.90	2.32	0.24
T02D Diabetes tests	833.5	- 1.97	2.15	3.66

BPI's own presentation, based on data from Insight Health 2017.

Medicine prices

Development of GKV medicine prices

in 2016: - 1.7 % (compared with 2015)

Unless otherwise indicated, the figures compiled here relate to 2016. For information on sources and further material on data, please refer to 'Pharma Data 2017'.



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