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)

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.

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 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

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

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’.