

Pharma-Data 2019 Compact

The pharmaceutical industry in Germany

Pharmaceutical companies:	521 (according to Federal Statistical Office)
Biotechnology companies:	679 (one in two active in health)
Pharmaceutical production*:	36.07 billion euros (+ 18.1 % compared to 2017)
Imports of pharmaceuticals:	56.93 billion euros (+ 8.1 % compared to 2017)
Exports of pharmaceuticals:	83.19 billion euros (+ 10.3 % compared to 2017)
Main customer:	
USA:	13.94 billion euros
Netherlands:	9.31 billion euros
Switzerland:	7.12 billion euros
Ireland:	5.43 billion euros
Employees:	121,415
Share of internal R&D expenses in sales in 2016:	14.0 % (1st place in Germany)

World pharmaceutical market**

Total market:	948.69 billion euros (+ 5.15% compared to 2017)
North America:	404.28 billion euros (+ 5.0 % compared to 2017)
EU:	220.33 billion euros (+ 4.0 % compared to 2017)
Japan:	67.42 billion euros (- 2.0 % compared to 2017)
Asia, Africa, Australasia***:	273.33 billion euros (+ 4.0 % compared to 2017)
Latin America:	50.75 billion euros (+ 9.0 % compared to 2017)

Own presentation of the BPI based on data from IMS World Review 2019.

Pharmaceuticals in the German Health Care System

Total SHI**** expenditure:	239.37 billion euros (+ 3.9 % compared to 2017)
SHI expenditure**** on pharmaceuticals:	38.67 billion euros (+ 2.6 % comp. to 2017)
Net share of pharmaceutical manufacturers:	around 10 %

* The strong increase in production in 2018 is due to a one-time special effect.

** The figures in euros result from the translation of market data with underlying values into US dollars (exchange rate: US \$ in € = 1.263 : 1).

*** The region "Asia, Africa, Australasia" contains the values for the submarket "Japan".

**** SHI benefit expenditure – without deduction of patient co-payments.

German pharmacy market

Pharmacy market, turnover

(at manufacturer sales prices): 33.7 billion euros
(+ 4.2 % compared to 2017)
of which available only on prescription: 27.9 billion euros (+ 5.2 %)
of which pharmacy-liable: 3.1 billion euros (+ 0.0 %)

TOP 10 leading indication areas (ATC-3) in the pharmacy market 2018 by turnover

Indication areas (ATC-3)	in thousand euros	% to previous year	Share of total turnover in %	Share of total sales volume in %
Total	33,742.9	4.16	100.00	100.00
L04B Anti-TNF preparations	1,988.2	5.66	5.89	0.04
L01H Antineoplast. Protein kinase inhibit.	1,637.3	11.83	4.85	0.03
N07A Agent for multiple sclerosis	1,515.8	0.99	4.49	0.04
B01F Direct Factor Xa inhibitor	1,385.1	20.90	4.10	0.49
A10C Human insulin and analogues	1,049.7	0.59	2.45	0.79
N02A Analgesics, anesthetics	827.4	- 1.64	2.26	0.62
J05C Virustatics against HIV	762.0	- 1.82	2.40	0.05
L02B Cytostatic hormone antagonists	664.4	11.10	1.97	0.10
L01X Other antineoplastic agents	662.8	46.91	1.96	0.03
M01C Antirheumatics, specific	573.1	27.19	1.70	0.14

Own presentation of the BPI based on data from Insight Health 2019.

Drug prices

Development of

SHI drug prices in 2018: - 1.8 % (compared to 2017)

Unless otherwise stated, the figures compiled here refer to the year 2018. For source information and further data, please refer to "Pharma-Data 2019".



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