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%

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* 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

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

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".