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Germany Healthcare Outlook Report, 2022

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Abstracts

This report can be delivered to the clients within 24 Hours

DelveInsight's, "Germany Healthcare Outlook 2022," report provides comprehensive insights about healthcare scenario, regulatory policies and reimbursement landscape in Germany. The report also identifies key trends in the healthcare market and provides insights into the demographic and healthcare infrastructure of the country. Along with this the report also provides a brief look into the trends and segmentation of the pharmaceutical and medical devices market of Germany.

As per DelveInsight's analysis, some of the best-known medical device manufacturers are based in Germany, and some major players from around the world have operations in Germany. However, small- to mid-sized medical device companies make up the majority of the industry. Germany is an attractive market due to its consistent growth and sophisticated approach to healthcare. Demand for highly innovative technologies and diagnostic, therapeutic, and minimally invasive equipment remains high. Many German manufacturers export their products, leaving an opportunity for foreign importers to capitalize on these demands.

Germany Healthcare Outlook

Germany officially the Federal Republic of Germany, is a country in Central and Western Europe with 83.2 million people, distributed on a territory of 357,022 square kilometers. In 2019, GDP growth for Germany was 0.6 %. Germany has a universal multi-payer health care system. It encompasses both statutory health insurance for people who earn less than a certain salary, as well as private health insurance for those who earn more and choose to purchase their own. Health insurance is provided by two subsystems: statutory health insurance (SHI), consisting of competing, not-for-profit, nongovernmental health insurance plans known as sickness funds; and private health

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insurance. Long-term care services are covered separately under Germany's mandatory, statutory long-term care insurance (LTCI). Unlike those in many other countries, sickness funds and private health insurers, as well as long-term care insurers, use the same providers. In other words, hospitals and physicians treat all patients regardless of whether they have SHI or private insurance.

Employers and their employees pay for most of the health care system in Germany through premiums. All workers contribute about 7.5 percent of their salary into a public health insurance pool. Employers match that 7.5 percent contribution. The ideology lives on in the modern German system. Everyone covered by statutory insurance has an equal right to medical care. And the system imposes strict limits on out-of-pocket costs, greatly reducing the number of surprise medical bills.

The first new bill introduced in 2018 (the SHI-Contribution Relief Law, or GKV-Versichertenentlastungsgesetz) aims to reduce the mandatory contributions that individuals in SHI pay every month. While the general contribution of 14.6% has been equally shared between employers and employees since 2015, the supplementary contribution is paid by employees only. The law plans to reinstate the equal split of general and supplementary contributions between employers and employees.

Furthermore, the Ministry of Health has recently issued a decree on minimum staffing requirements for nurses in hospitals. The maximum number of patients per nurse has been defined for hospital units where nursing staff is particularly needed — intensive care, geriatric, cardiology, and trauma surgery — to guarantee patient safety. The regulation went into effect January 2019.

Germany Industry Overview Chapter

Pharmaceutical

The German pharmaceutical market is the largest in Europe and the fourth largest in the world. 1170 pharmaceutical and biotechnology companies with more than 128,000 workers (2015) operate in Germany. In addition to globally successful enterprises, the industry composed of more than 800 medium-sized businesses and young biotech companies. German companies invest $6.5 billion (2016) annually in research and development. Within Europe, Germany is the leading market for non-prescription medicines products.

Medical Device

The German medical device market is the largest in Europe and the third largest in the world. It was valued at $26 billion in 2014 and continues to grow despite a sluggish European economy. Germany has become one of the world's most important countries for clinical studies. Germany is the leader in industry-initiated clinical studies in Europe and second worldwide. The dense network of universities and faculties as well as a variety of research institutions not affiliated to universities speak in favor of Germany as a business location.

Apart from this the report covers some latest information on COVID 19 update and future of healthcare technology in Germany.

Germany Healthcare Assessment Chapter

This chapter contains the statistical information containing, number of hospitals, number of beds, number of pharmacies, life expectancy of male and female, Immunization coverage, environmental health (PM 2.5 and CO2 Emissions), number of physicians, nurses, dentists and pharmacists, healthcare expenditure, healthcare expenditure as share of GDP, out of pocket expenditure, pharmaceutical import and export, Gross Domestic Product, Inflation, Unemployment, trade associations and trade fairs in Germany.

Germany: Market Access

Market access section of the Germany Healthcare Outlook report contains information on how to penetrate the pharmaceutical and medical device markets in terms of setting up manufacturing unit, import export licensing, regulations pertaining to patents, trademarks, clinical trials, advertising, pharmacy regulation, labeling and packaging. It also covers detail about healthcare insurance and reimbursement policy.

The German health care system is notable for the sharing of decision-making powers among the federal and state governments and self-regulated organizations of payers and providers. Within Germany's legal framework, the federal government has wide-ranging regulatory power over health care but is not directly involved in care delivery. The Federal Joint Committee, which is supervised by the Federal Ministry of Health, determines the services to be covered by sickness funds. To the extent possible, coverage decisions are based on evidence from comparative-effectiveness reviews and health technology (benefit-risk) assessments.

Germany: PESTLE Analysis

The report covers a thorough analysis of the country through PESTLE analysis tool and gives political, economic, social, technological, legal and environmental aspects of healthcare industry.

Report Highlights

- Overview of the pharmaceutical and medical device markets
- An insightful review of the reimbursement and regulatory landscape, covering the healthcare reimbursement process, regulatory agencies, and the approval processes for new drugs and medical devices
- Detailed analysis of the political and economic environment, including economic indicators, demographics, healthcare infrastructure and healthcare expenditure
- An overview of the opportunities for and challenges to growth in the healthcare market

Germany Report Insights

- Germany – Healthcare Outlook
- Germany – Healthcare Assessment
- Germany – Market Access
- Germany – Healthcare Market Perspectives
- Germany – Analyst Views

Key Questions

- What are business strategies and trends shaping and driving the Germany healthcare market?

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What are reimbursement and regulatory policies, pharmaceutical and medical device market segments and companies likely to impact the Germany healthcare market in the future?

How to organize sales and marketing efforts by identifying the market categories and segments that present the best opportunities for consolidation, investment and strategic partnership?

How to identify, understand and capitalize on the opportunities and challenges in the Germany healthcare market?

Key Players

Fresenius AG

Bayer AG

Evotec AG

Boehringer Ingelheim

Merck KGaA

Helios Kliniken GmbH

Sandoz International GmbH

Symrise AG

Alexianer GmbH

T?V NORD Group

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