

# GERMANY'S (DIGITAL) HEALTHCARE MARKET

**INNOLABS INNOVATIVE WEBINAR**

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# Agenda

1. Who We Are and What We do
2. Healthcare in Germany
3. Demographic Challenges - Digital Healthcare Solutions
4. Q&A and Discussion



# 1. WHO WE ARE AND WHAT WE DO

# Who we are

Foreign trade and inward investment agency  
of the Federal Republic of Germany

**GTAI** GERMANY  
TRADE & INVEST

Shareholder



Federal Ministry  
for Economic Affairs  
and Energy



# What we do



International marketing of Germany as a business and technology location



Economic promotion of the new federal states and Berlin



Business location consultancy services for international investors



Export market information for the German economy

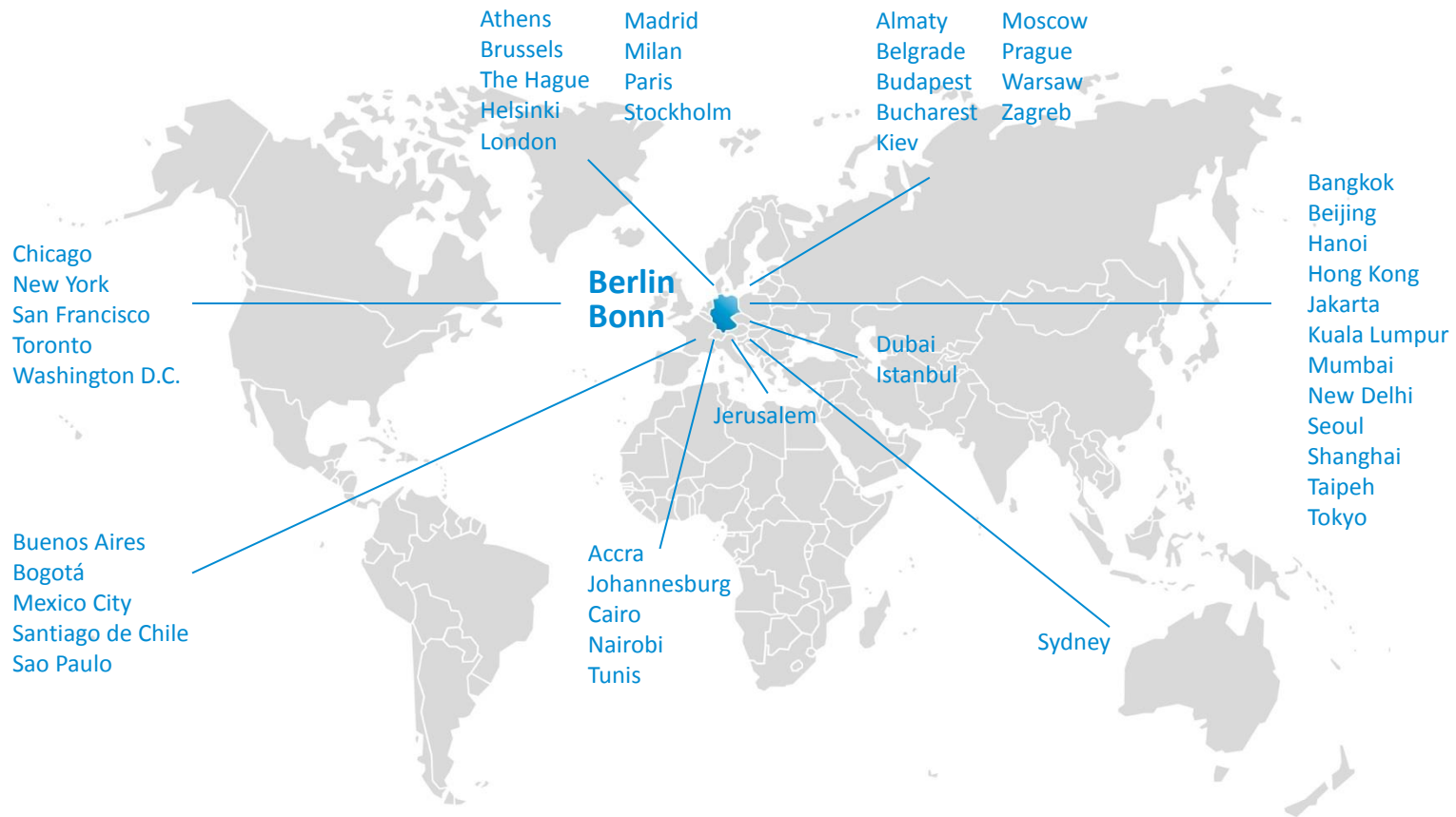
# Our Services

## Individual Consulting

- Market and industry reports
- Market entry analyses
- Tax and legal information
- Funding and financing
- Partnering
- Site selection

**All publications and all our services are free of charge**

# We are on the spot for you worldwide – ensuring that you receive competent support.



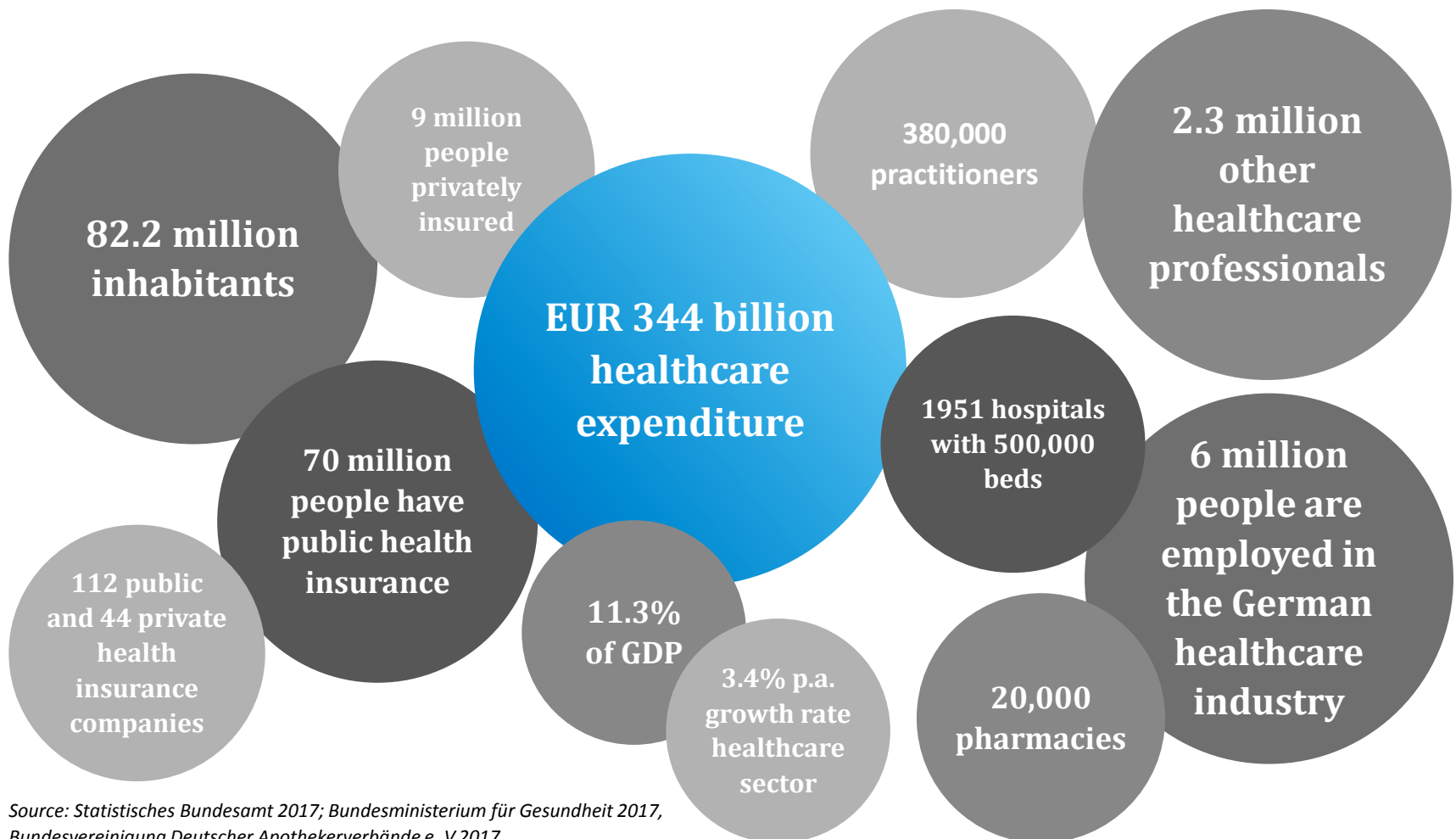


## 2. HEALTHCARE IN GERMANY



# Healthcare Market Germany

One of Germany's largest growth markets at a glance

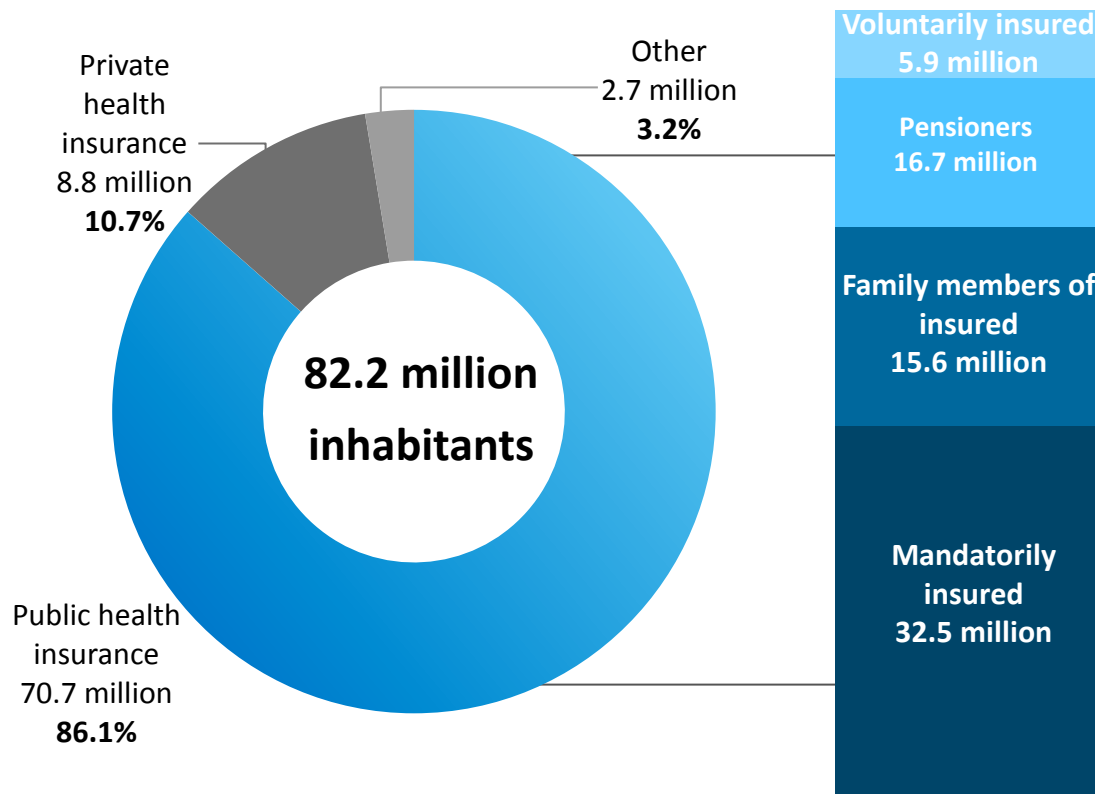


Source: Statistisches Bundesamt 2017; Bundesministerium für Gesundheit 2017, Bundesvereinigung Deutscher Apothekerverbände e. V. 2017

# Health Insurance

## Germany achieves almost universal health insurance coverage

### Types of health insurance in Germany



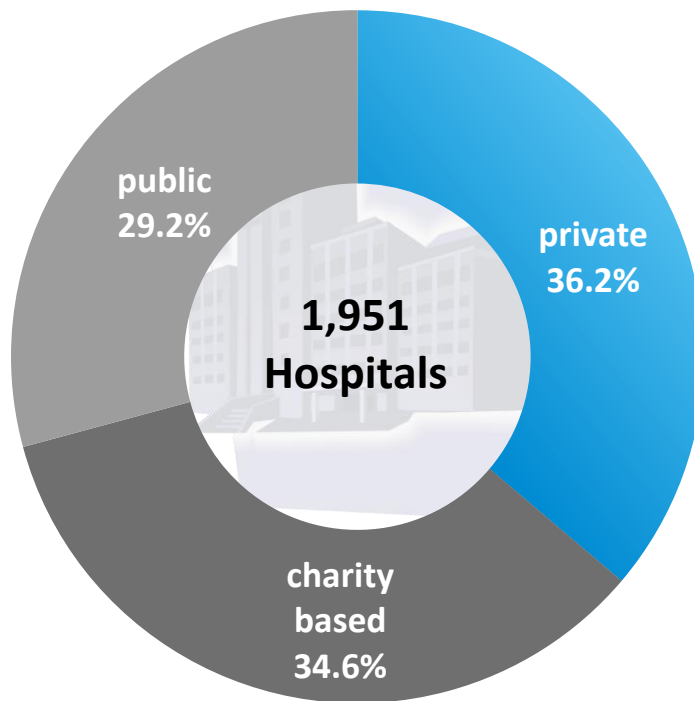
- Health insurance coverage is mandatory in Germany.
- Both publicly and privately insured can choose their provider.
- Number of health insurance companies (2017):
  - 44 private
  - 112 public

Source: Verband der Ersatzkassen e. V. (vdek) 2017

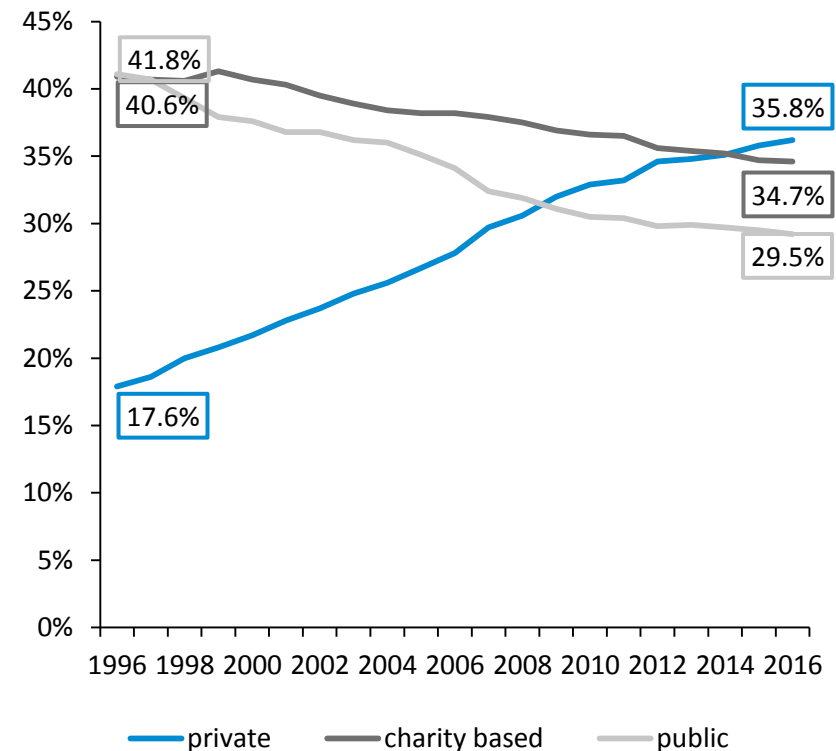
# The German Hospital Sector

The share of privately owned hospitals continues to rise

## Number of hospitals and ownership 2016



## Share of hospital ownership 1996-2016



Source: German Hospital Federation 2017

Source: German Hospital Federation 2017



### 3. DEMOGRAPHIC CHALLENGES - DIGITAL HEALTHCARE SOLUTIONS

# Demographic Challenges

Growing demand for healthcare services drives the development of digital healthcare solutions in Germany



## Aging Society

- 2035: 24 million people aged 65 years or older (31 percent of the population)



## Care Dependency

- 2020: 2.5 to 3 million
- 2050: 3.25 to 4 million



## Chronic Diseases

- Chronic and long-term diseases account for about 80 percent of German healthcare spending (EUR 200 billion)
- Within 14 years the number of people with diabetes mellitus has risen from 5.8 to 7.2 million people

Source: DB Research 2010, Statista 2014, Statistische Bundesamt 2014

# E-Health Act 2016

## Secure Digital Communication and Applications in Healthcare

2016

The E-Health Act became effective January 1st.

From October on, patients are entitled to receive a medication plan.

2017

A reimbursement scheme will be introduced for tele-consulted X-ray diagnosis (from April on) and video consultation (from July on).

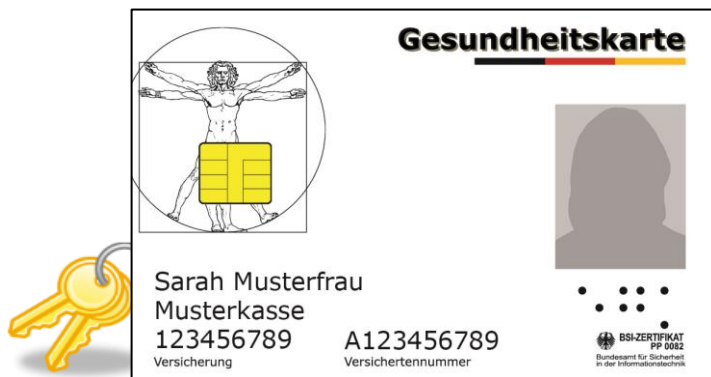
2018

The medication plan will be accessible electronically through the Electronic Health Card.

Emergency data can be stored on Electronic Health Card.

Patients can store their own data (e.g. fitness data) in a patient file.

Gematik has to lay the foundation for the usage of the patient file with the Electronic Health Card to ensure that patient can access their data also outside of the doctor's office.



Source: Bundesverband Gesundheits-IT – bvitg e.V. 2016, gematik GmbH 2016

# Moving Forward

Pilot projects for Germany's healthcare system

**Remote treatment**

**ePrescription**

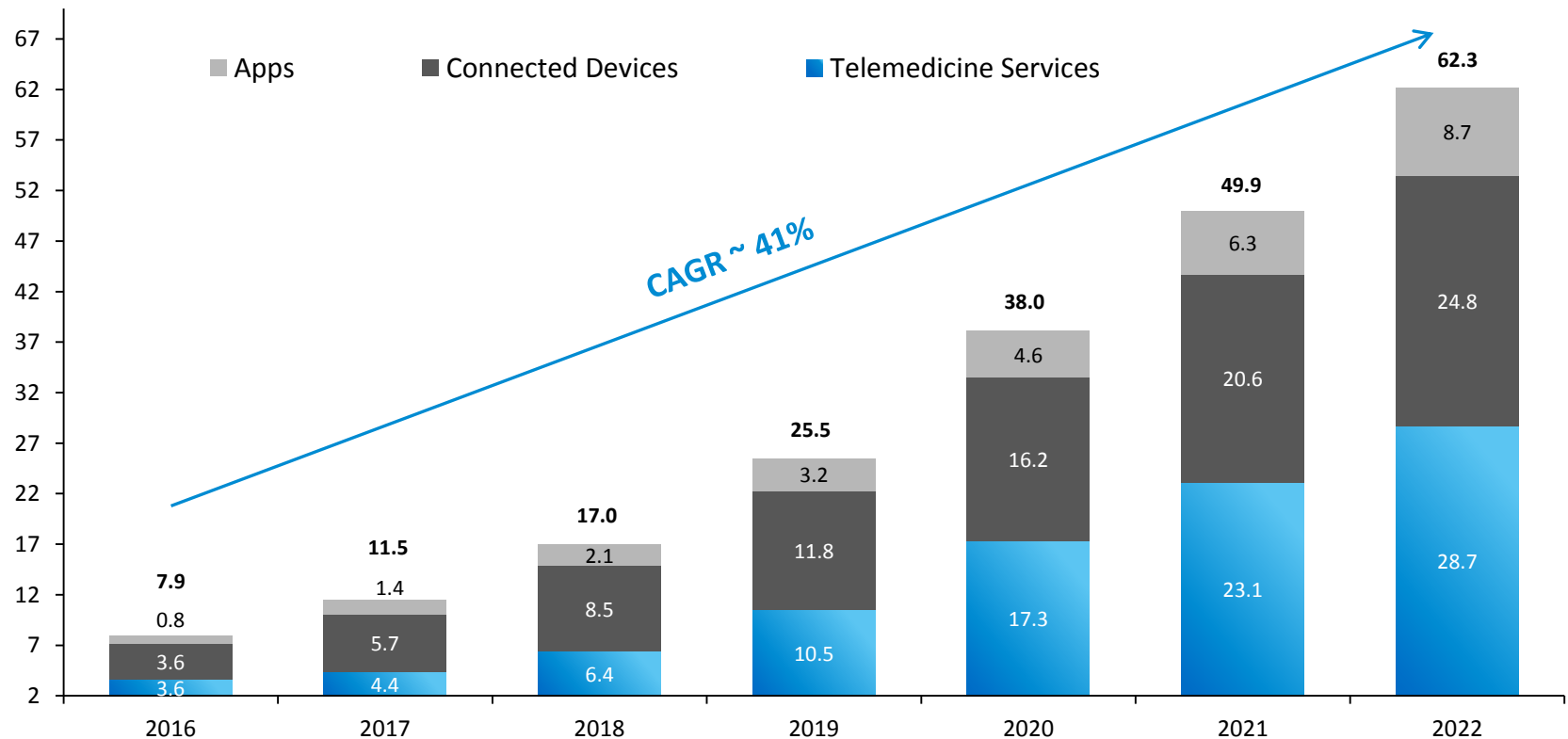
**Electronic sick certificate**



# Telemedicine

The German market for telemedicine will grow by 41% through 2022

Revenue forecast for telemedicine used to manage high blood pressure 2016 – 2022 (in EUR million)

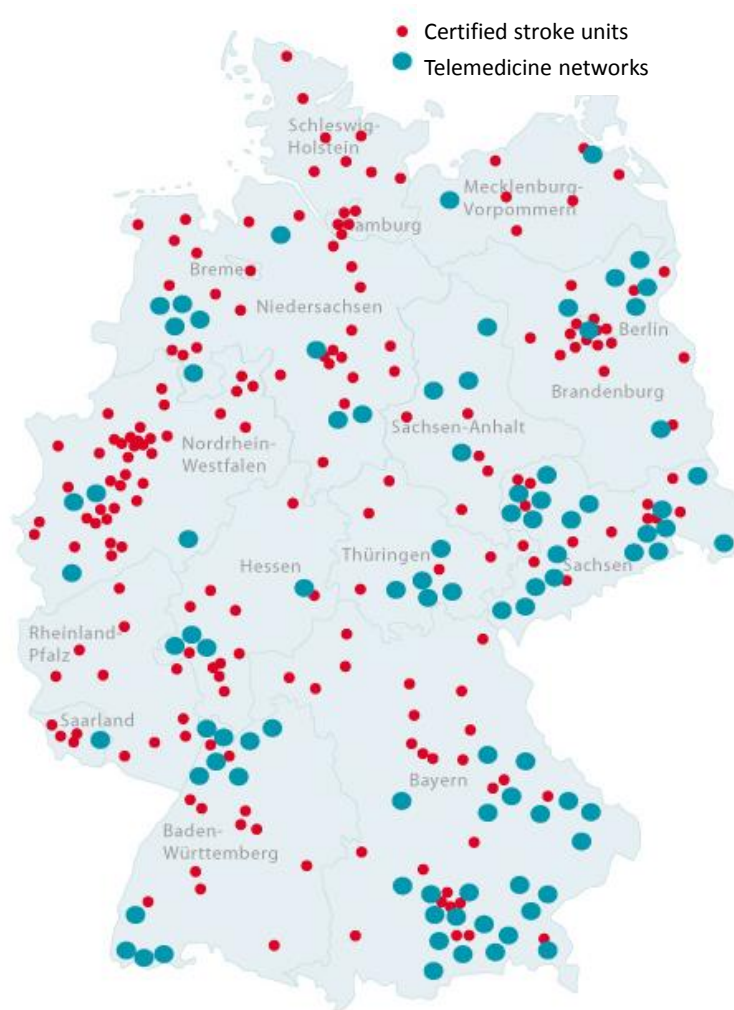


Source: Statista Digital Market Outlook 2017



# Telemedicine Networks in Germany

Germany has a dense network of certified stroke units and tele-stroke units



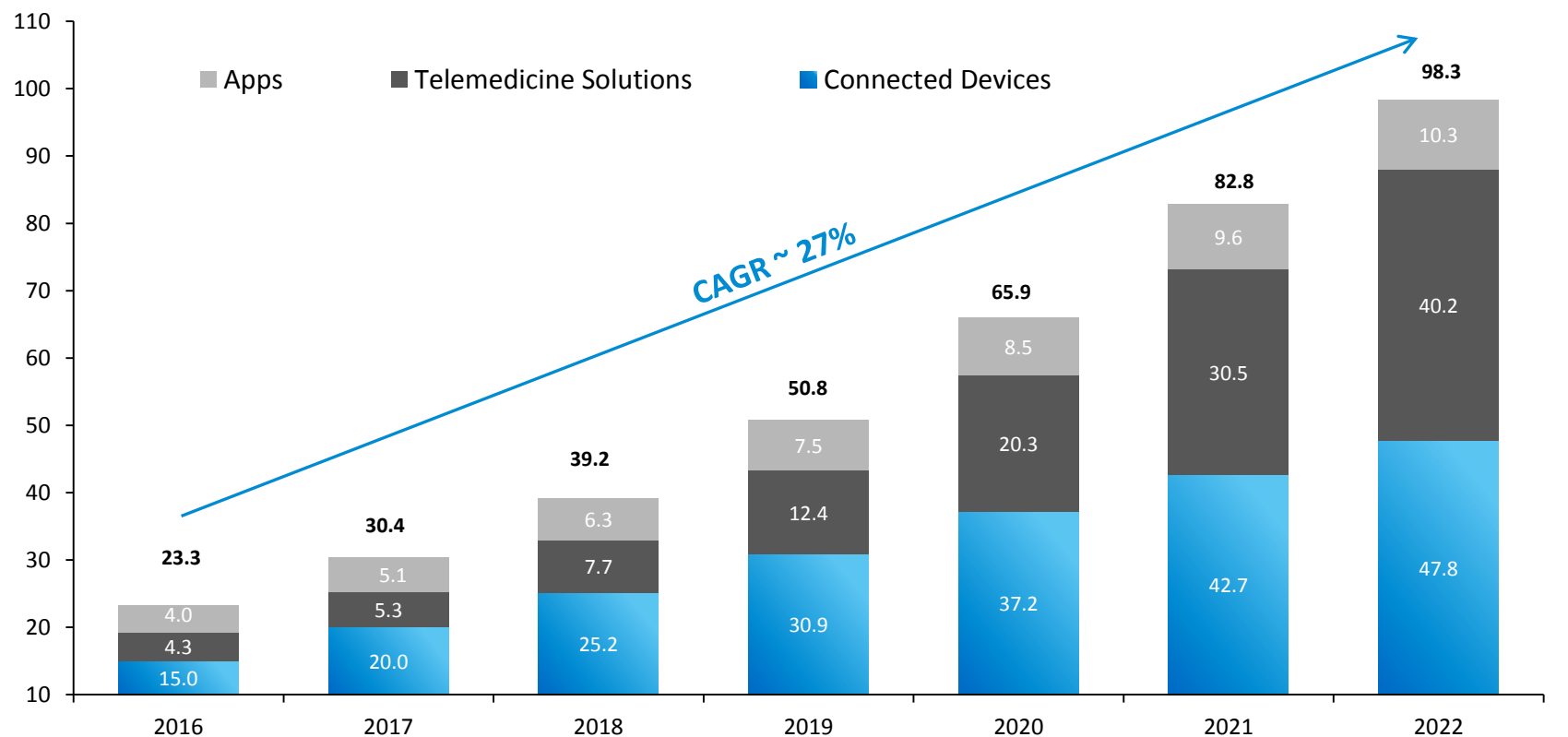
- There are about 276 hospitals with certified stroke units.
- Telemedicine enables the connection of local hospitals and bigger hospitals with strokes units.
- Tele-stroke units complement high quality and comprehensive medical care of stroke cases in rural areas.

Source: DGTelemed 2015

# Smart Solutions for Diabetes Management

The German market for diabetes solutions will grow by 27% through 2022

Revenue forecast for digital diabetes solutions 2016 – 2022 (in EUR million)

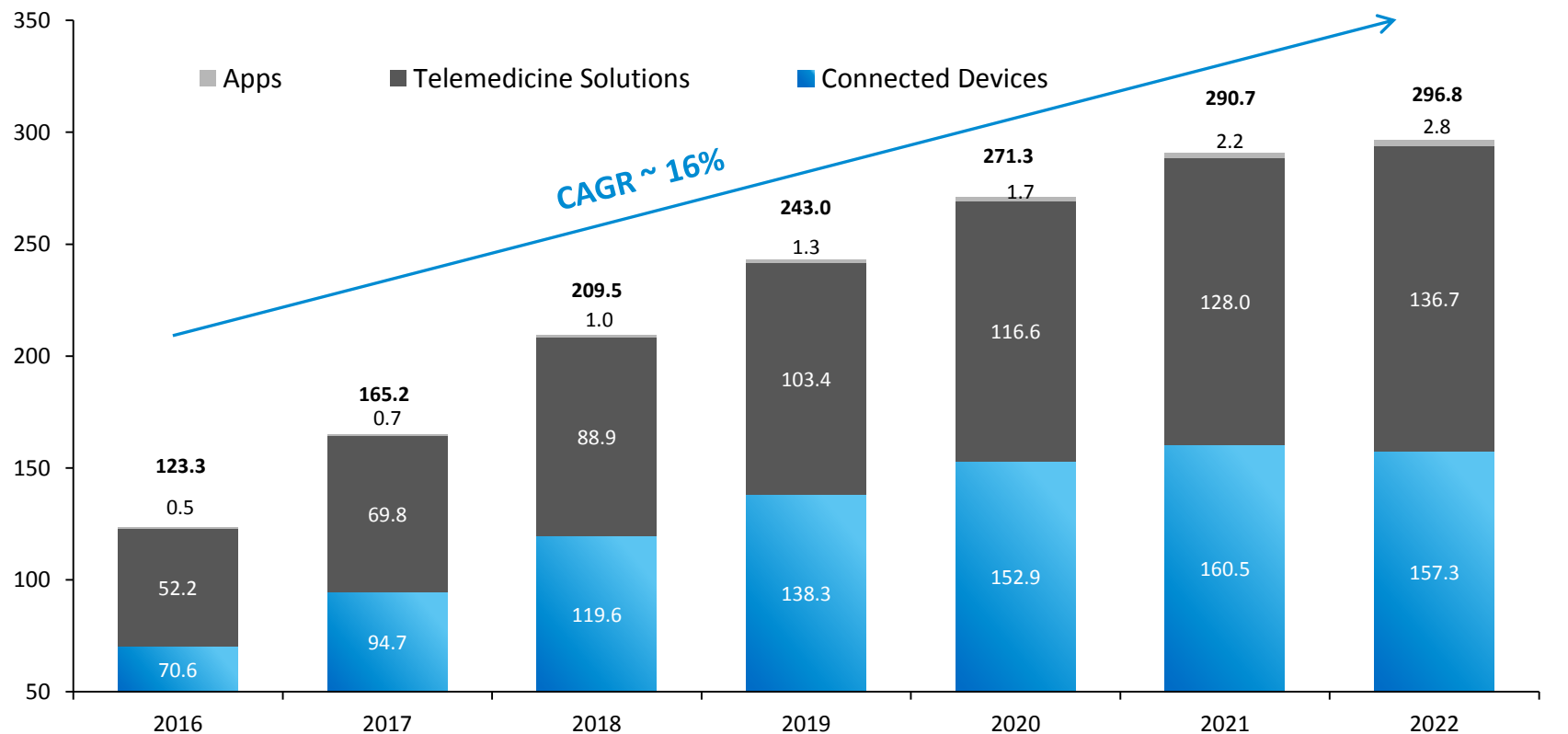


Source: Statista Digital Market Outlook 2017

# Smart Solutions for Heart Failure Management

The German market for heart failure solutions will grow by 16% through 2022

Revenue forecast for digital heart failure solutions 2016 – 2022 (in EUR million)



Source: Statista Digital Market Outlook 2017

# German Digital Health Companies

Smart solutions for the healthcare system

## Selected digital health companies in Germany



Source: HealthBytes 2015

# Contact Us

Germany Trade & Invest is the economic development agency of the Federal Republic of Germany. The company helps create and secure extra employment opportunities, strengthening Germany as a business location. With more than 50 offices in Germany and abroad and its network of partners throughout the world, Germany Trade & Invest supports German companies setting up in foreign markets, promotes Germany as a business location and assists foreign companies setting up in Germany.

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