



German Healthcare Sector Strategic Insights & Partnership Opportunities

Sofia, Bulgaria | October 21, 2025

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Shared Challenges, Shared Opportunities

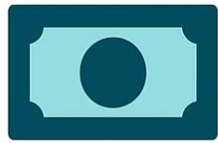
- Aging populations
 - Healthcare workforce shortages
 - Urgent need for digitalization
 - Constant demand for innovation in medical technology and pharmaceuticals
- Solutions: Technology transfer, strategic partnerships, knowledge exchange

Healthcare: A Cornerstone of German Economy



7.3M

(1 in 6 jobs
in Germany)



€ 775B

annual economic
footprint
(12,8% of GDP)



€ 435B

gross value
added (11.5%
of economy)



€ 159.4B

foreign sales
(8.1% of total
exports)

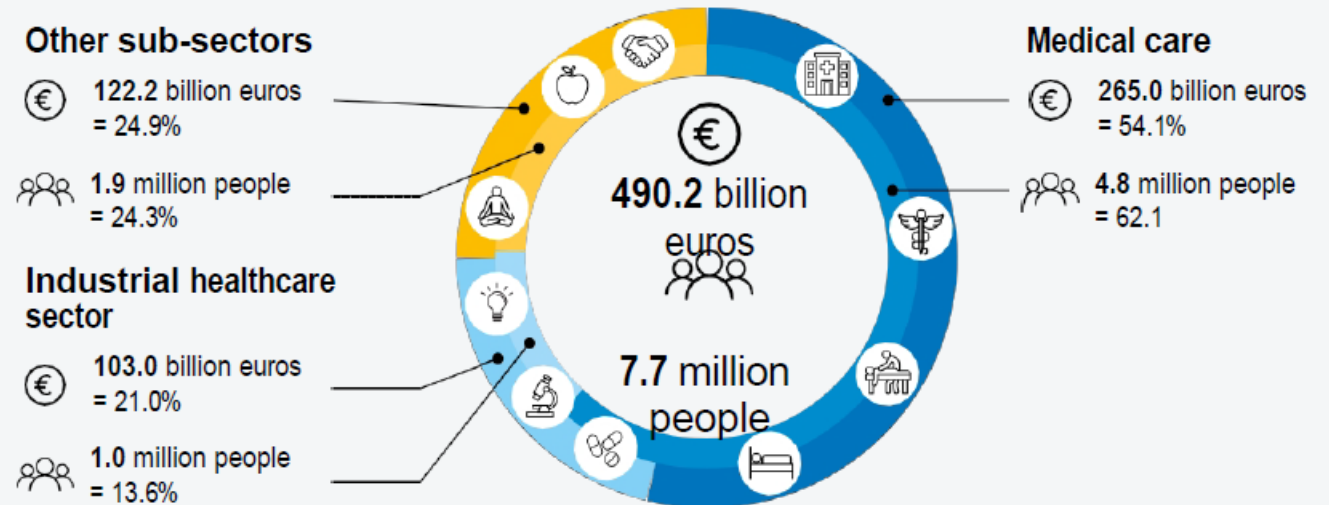


Comparable
in size to
Germany's
automotive
industry

Germany's Industrial Healthcare Sector: Innovation and Economic Strength

- The industrial healthcare sector (iGW) is a large sub-sector of the healthcare industry.
- The iGW includes goods such as human medicines, medical devices, and medical technology.
- The iGW also includes wholesale, R&D activities of companies in the healthcare industry, and digital applications in the healthcare industry.

Figure 1: Share of gross value added and number of employees in the iGW in the overall healthcare industry



Source: BMW Dashboard (2025), calculations by WifOR Institute.

Germany's Industrial Healthcare Sector: Innovation and Economic Strength

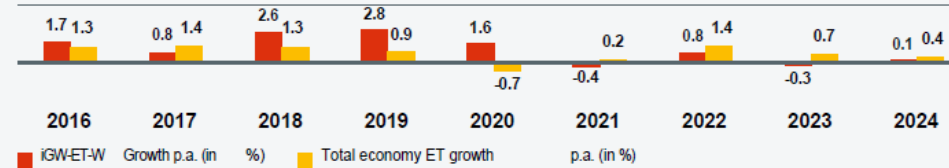
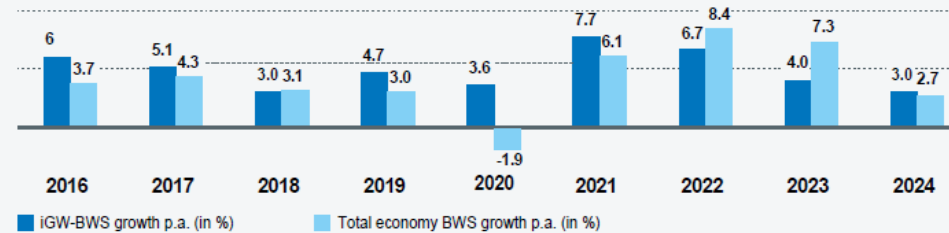
In 2024, the industrial healthcare sector will generate gross value added of €103 billion and employ one million people.

Key figures, national	Share of Total economy	Change Total economy to previous year	Growth Total economy p.a. since 2015	Share of Health health economy	change to previous year	Growth p.a. since 2015
103.0 billion euros Gross value value added	2.6	+2.7	+4.0	21.0	+3.0	+4.8%
1.0 million Employed persons	2.3%	+0.4	+0.8%	13.6	+13.6	+1.1%
9.8 billion euros Gross value in R&D*	0.3	+3.9	+7.3	2.0	2.0	+7.3
62,100 Employed persons in R&D	0.1%	+1.1	+3.7	0.8	0.8	+3.7

* R&D activities refer to the entire iGW.
Source: BMW Group (2025), calculations by WifOR Institute.

Growth rates of the iGW and the overall economy over the last 10 years in comparison

Figure 2: Comparison of growth rates in the iGW and the overall economy over the last 10 years



Source: BMW Dashboard (2025), calculations by WifOR Institute.

Pharmaceuticals in Germany

- €60B revenue 2023 (+5.7% growth)
- 700 companies (84% are SMEs)
- 133,000 employees
- €113B exports (63% of sales)
- Export destinations: Europe 55%, USA 17%, Asia 15%



Pharmaceutical Innovation



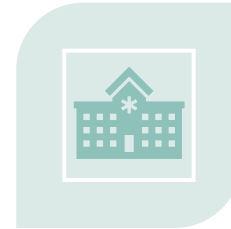
€9.4B ANNUAL
R&D
INVESTMENT



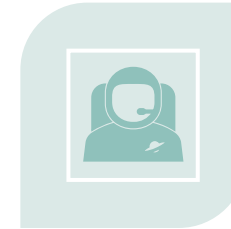
16% GLOBAL
PHARMA R&D
MARKET SHARE



75% OF NEW
DRUGS TARGET
CANCER OR
IMMUNOLOGIC
AL DISEASES
(2023)



4–5% ANNUAL
GROWTH IN
BIOLOGICS &
PERSONALIZED
MEDICINE



KEY PLAYERS:
BAYER,
BOEHRINGER
INGELHEIM,
BIONTECH;
STRONG SME
BASE

Medical Technology in Germany

- €55B total revenue (€40B from 20+ employee firms)
- 13,500 total companies (1,500 with 20+ employees)
- 265,000 employees
- 93% SMEs (<250 employees)
- 41% of European MedTech turnover (€55B of €134B total)



MedTech: Export Power & Innovation

- 68% revenue from international markets
- €27.4B total exports 2023
- Top destinations: USA 19%, China 8%, Europe majority
- 1,380 patents (EPO 2023), €3B+ annual R&D investment (~9% of revenue)
- Germany: Europe's #1 MedTech Innovation Location

Innovation Ecosystem

- €12B+ combined annual R&D investment (Pharma + MedTech)
- 50 MedTech cluster networks
- 56 approved digital health apps (€75M revenue 2023)
- €23.2B medical aids market 2023 (+7.4% growth)
- Growing sectors: Biologics, Digital health, AI diagnostics, Personalized medicine

The Strength of German SMEs

- Innovation-driven – continuous R&D investment
- Strong export performance – globally competitive
- Unique SME structure – 'Hidden Champions'
- Partnership-oriented – flexible and collaborative
- Long-term commitment – sustainable growth focus

German Health Alliance

- ~120 members
- Initiative of Federation of German Industries (BDI)
- Represents 100,000+ companies and 8M employees
- Members include pharma, medtech, diagnostics, digital health, consulting, hospitals

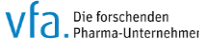


An initiative of



BDI
The Voice of
German Industry

GHA-Members

Diagnostics & Laboratory Analyses    	Pharmaceuticals  	E-Learning & Training 	Healthcare Facility  	
	Supporting Partner 	NGOs & Foundations  	Development Cooperation & Finance 	HealthCare Architecture & Construction  
Organisations & Associations 	Healthcare Consulting & Certificati   	Digital Health, Tele-Medicine, e-Health  	Science & Academia Research 	
Medical Technologies    				

Our Mission



Advocate for innovation-friendly framework conditions



Facilitate international market access



Promote public-private partnerships



Build bridges between German health industry and international partners

8th German-East European Health Forum

- October 10, 2024, Berlin
- Theme: Strong Health Systems for Welfare and Economic Growth
- Official side event: World Health Summit 2024
- Ministers & officials from Georgia, Hungary, Lithuania



Working Group Eastern Europe & CIS

- 200+ active participants
- 3–4 meetings per year
- Best practices for strengthening the health systems and establishing innovation partnerships across the region
- Next meeting: Q1 2026



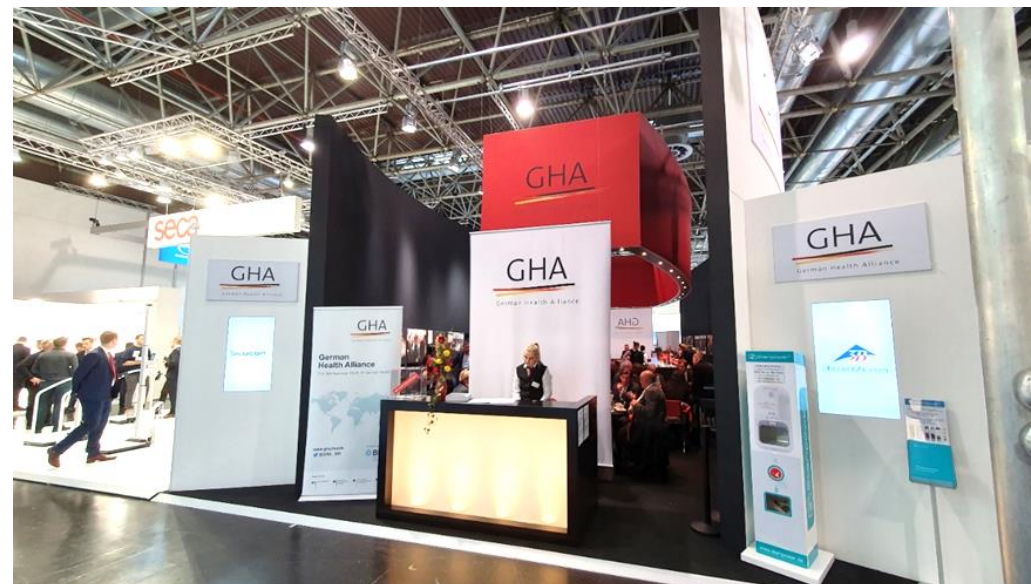
How We Support Partnerships

- Events & Delegations: Roundtables, delegations, matchmaking



How We Support Partnerships

- Events & Delegations: trade fairs (MEDICA, WHX Dubai)
- Upcoming: MEDICA 2025, November 10–13, Düsseldorf
- 10 – 20 members
- GHA-Lounge for all members
- Reception of delegations



Concrete Next Steps for Bulgaria

- Join our Working Group Eastern Europe & CIS
 - Next meeting: Q1 2026
 - Dedicated session on the Bulgarian Health Sector
- 9th German-East European Health Forum 2026, Berlin
 - Connect with ministers & industry leaders
 - Strategic networking opportunities
 - Invitation to Bulgarian Ministry of Health



Thank You!

Let's Connect

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