

Healthcare Industry 2021

Facts and Figures for Baden-Württemberg



MEDTECH



PHARMA

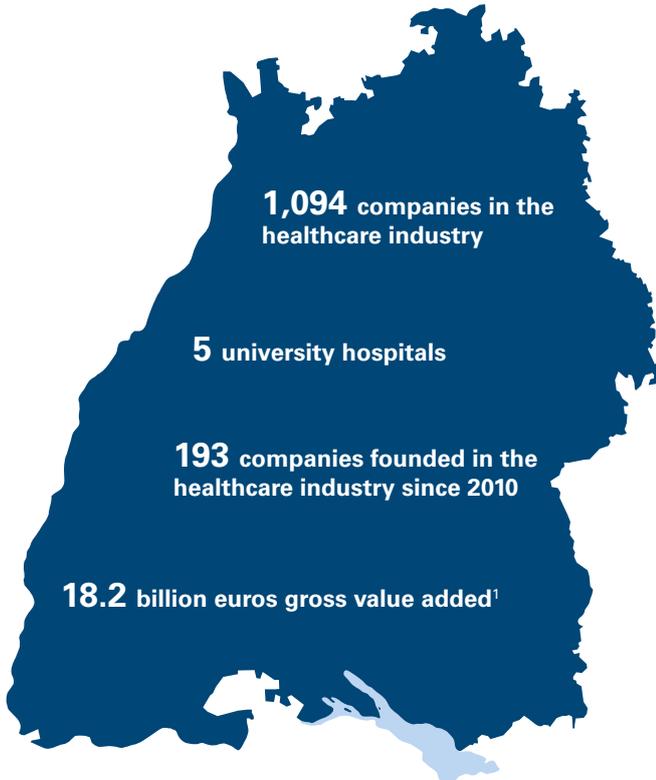


BIOTECH



The Healthcare Industry at a Glance

High employment rate, high turnover and export-oriented



The healthcare industry comprises the **medical technology, pharmaceutical industry** and **medical biotechnology sectors**. In 2019, the **1,094 companies** of this industry generated a **turnover of 25.76 billion euros** and employed **98,619 people**.

The **gross value added** of the industrial healthcare sector (healthcare industry + the sales and wholesale sectors) in Baden-Württemberg achieved an **average annual growth of 3.8 percent** between 2010 and 2019 and amounted to **18.2 billion euros** in 2019.¹

The Baden-Württemberg industrial healthcare sector is the **leading exporter** in Germany with an export contribution of **38.8 billion euros** in 2019.¹

¹ WifOR Institute on behalf of BIOPRO Baden-Württemberg GmbH (2021): Untersuchung des ökonomischen Fußabdrucks der industriellen Gesundheitswirtschaft in Baden-Württemberg



The Healthcare Industry at a Glance

Innovative and powerful

Strategic partnerships at the interface between industry and science are essential for developing innovative treatment methods and techniques that generate value here in Baden-Württemberg.

Baden-Württemberg offers a multifaceted network of **excellent academic and industry-relevant research**, which is among the most competitive in Germany.¹

In an EU comparison, Baden-Württemberg comes out top across all sectors as the **most innovative** region in terms of nominal gross domestic product invested in research and development.²

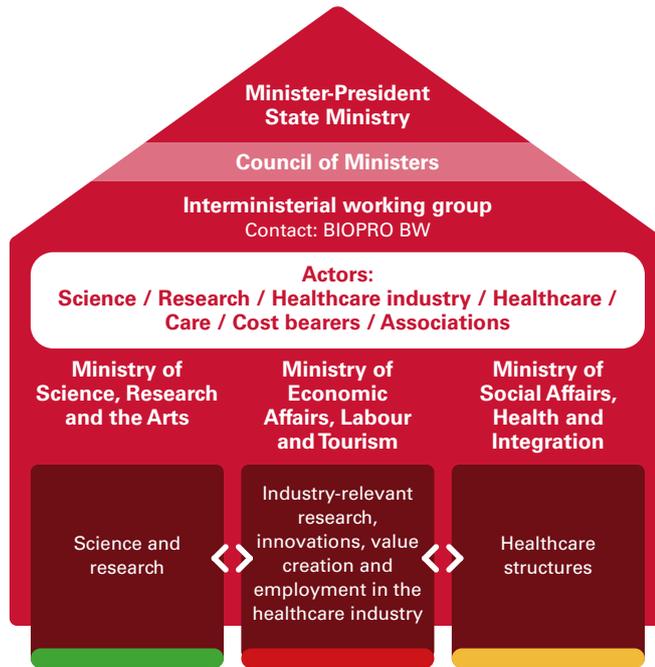
MEDICAL TECHNOLOGY		
842 Companies	53,162 Employees	14.26 Billion euros taxable turnover
PHARMACEUTICAL INDUSTRY		
88 Companies	26,590 Employees	7.52 Billion euros taxable turnover
BIOTECHNOLOGY		
188 Companies	18,867 Employees	3.98 Billion euros taxable turnover

1 Deutsche Forschungsgemeinschaft e. V. (2021): Förderatlas 2021 – Kennzahlen zur öffentlich finanzierten Forschung in Deutschland

2 Baden-Württemberg Statistics Office (2021): Innovationsindex für die Länder bzw. Regionen der Europäischen Union

Forum Health Region Baden-Württemberg

Aiming for the top with healthcare



The **Forum Health Region Baden-Württemberg** aims to make Baden-Württemberg a leading location for medical research, innovative healthcare, and the development and manufacture of medical products. In its third year of existence, the Forum Health Region Baden-Württemberg brings together more than **500 stakeholders** from science, industry and care.¹ The Forum Health Region Baden-Württemberg's key areas of action are education, training and study, digitalisation, innovation and translation, precision medicine, regulatory affairs and COVID-19.

More information at:



www.forum-gesundheitsstandort-bw.de



¹ Forum Health Region Baden-Württemberg (2021): Strategische Handlungsempfehlungen zur Zukunft des Gesundheitsstandorts Baden-Württemberg

Medical Technology Sector

(Hidden) champions in all parts of the state

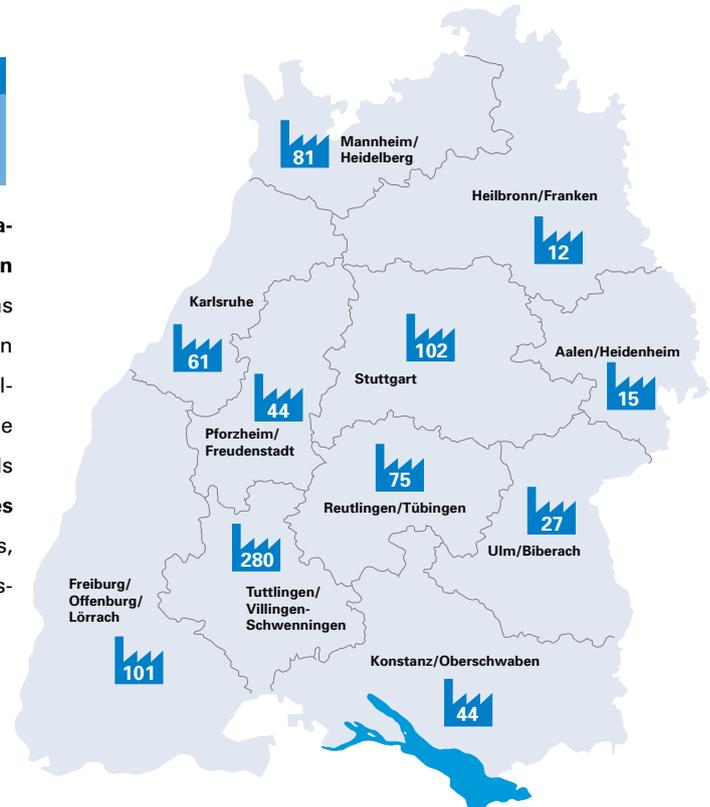
MEDICAL TECHNOLOGY

842
Companies

53,162
Employees

14.26
Billion euros taxable
turnover

Baden-Württemberg is home to **842 medical technology companies**. In 2019, the industry generated a turnover of **14.26 billion euros** and employed **53,162 people**. The value of exports has increased by 2.1 billion euros since 2010 to **6.5 billion euros** in 2019.¹ **Experts and traditionalists** in the fields of materials development and refinement as well as production technologies come together here, as do developers and users of novel biomaterials and artificial intelligence. **Seven medical technology companies were founded** between 1/2020 and 7/2021. For the past two years, the number of start-ups in the **eHealth** segment has been increasing significantly.



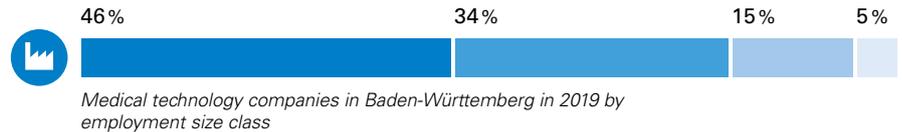
¹ WifOR Institute on behalf of BIOPRO Baden-Württemberg GmbH (2021): Untersuchung des ökonomischen Fußabdrucks der industriellen Gesundheitswirtschaft in Baden-Württemberg

Medical Technology Sector

Regional ecosystems with specialised supplier structures

In addition to a large number of small- and medium-sized companies, Baden-Württemberg is also home to large **global companies and hidden champions**. A characteristic of Baden-Württemberg's medical technology sector is the high concentration of small- and medium-sized companies (SMEs). Just under **half of all medical technology companies** are microenterprises with **fewer than 10 employees**. Compared to the previous year, 2019 turnover and employment figures fell by 2.3 and 0.9 percent, respectively.

The extent to which the new MDR and IVDR regulatory requirements or the coronavirus pandemic will impact the industry is not yet visible in these figures.



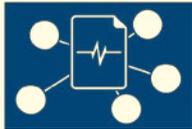
■ < 10
 ■ 10 - 49
 ■ 50 - 249
 ■ ≥ 250



Medical Technology Index for Baden-Württemberg: turnover development from 2007 to 2019 in million euros

MDR & IVDR Fast-Track Support BW

Practical support for SMEs



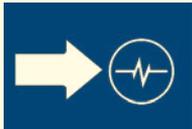
Product Group-Specific Shared Documents

Development of basic documents that can be used as a basis for creating certification documents.



MDR & IVDR Expert Talks BW

Quality management and regulatory affairs specialists discuss MDR-/IVDR-relevant issues and develop guidelines on various topics.



Clinical Study Guide BW

A central information hub with a guide function is aimed at facilitating access to clinical trial centres.



MDR & IVDR Roundtables

Opportunity for an informal exchange between notified bodies, supervisory authorities, service providers, etc. in order to minimise uncertainty in the interpretation of the MDR and IVDR.



MDR & IVDR Fast-Track Support Events

Results of the Fast-Track Support programme as well as relevant topics relating to the MDR and/or IVDR are addressed.

In 2019, the Baden-Württemberg Ministry of Economic Affairs, Labour and Tourism made funds available for a **Fast-Track Support** programme to help the medical technology sector in Baden-Württemberg implement the MDR and IVDR. The aim of **MDR & IVDR Fast-Track Support BW** is to **offer user-oriented support services** for implementing the MDR and IVDR to help companies save time and resources. The **MDR & IVDR Guide BW** produced by BIOPRO Baden-Württemberg also pools important information related to the MDR and IVDR.

More information at:

 mdr-ivdr.bio-pro.de

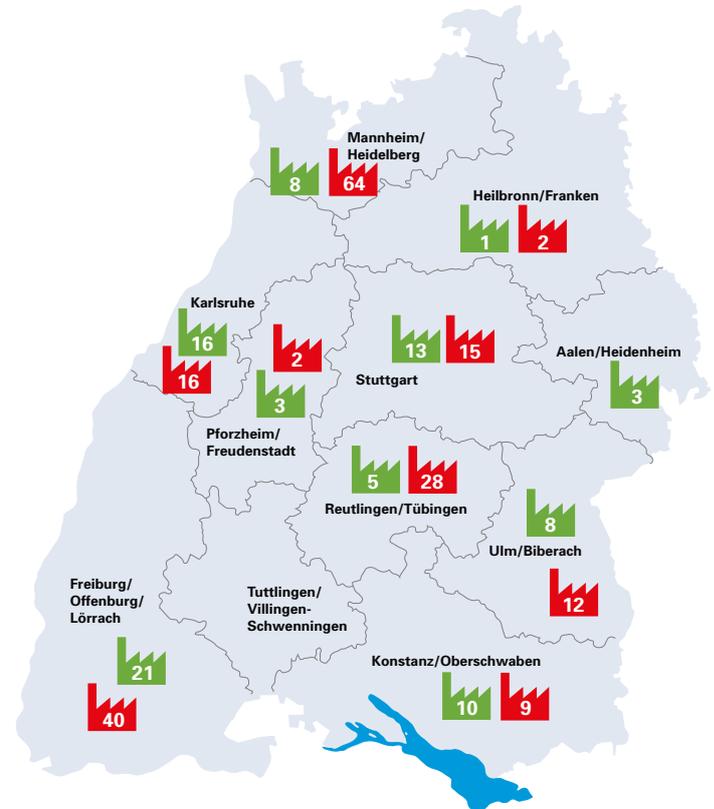
Pharmaceutical Industry & Biotechnology

Internationally successful

PHARMACEUTICAL INDUSTRY		
88 Companies	26,590 Employees	7.52 Billion euros taxable turnover
BIOTECHNOLOGY		
188 Companies	18,867 Employees	3.98 Billion euros taxable turnover

A total of **270 companies** are active in the **biotechnology and/or pharmaceutical industry sectors** that research, develop and/or produce in Baden-Württemberg. In 2019, **45,457 employees** generated a **taxable turnover of 11.5 billion euros**. The industry reinvests about **13 percent of its turnover** in research and **development projects**, making it the industry sector with the highest percentage of internal R&D spending.¹The coronavirus pandemic has helped the industry gain more positive public attention, particularly through the **development and production of vaccines** against the SARS-CoV-2 virus.

¹ Bundesverband der Pharmazeutischen Industrie e. V. (BPI): Pharma-Daten 2020



Pharmaceutical Industry

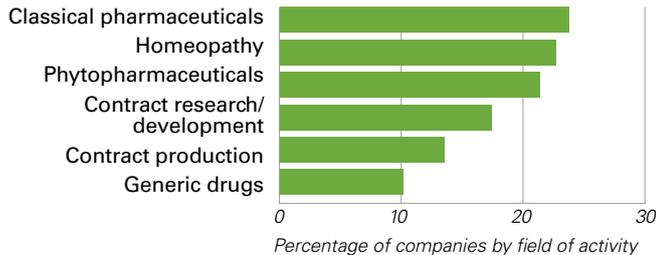
Top performer in a Germany-wide comparison



Companies in the pharmaceutical industry in Baden-Württemberg in 2019 by employment size classes



Turnover of the pharmaceutical industry in Baden-Württemberg in 2019 by employment size classes



Fields of activity of the pharmaceutical industry in Baden-Württemberg (companies may have several fields of activity)

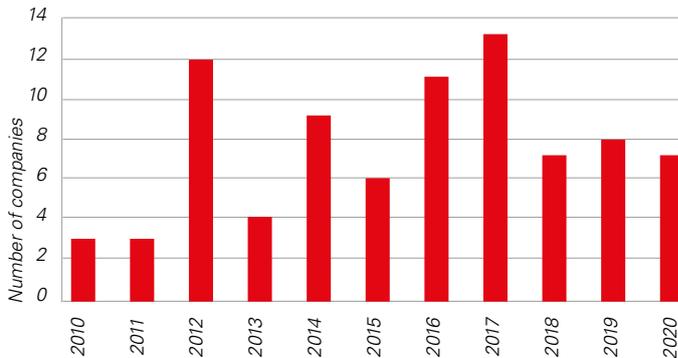
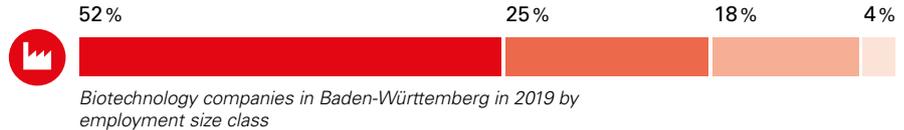
Baden-Württemberg is home to **88 pharmaceutical companies**. In 2019, they generated a **turnover of 7.52 billion euros** and employed **26,590 people**. In the field of human pharmaceuticals, the pharmaceutical companies achieved a GVA amounting to **5.7 billion euros** in 2019. By 2019, the value of **exports had grown to 26.6 billion euros**.¹ In addition to industry giants such as Roche, GlaxoSmithKline and Boehringer Ingelheim, Baden-Württemberg is also home to a large number of **small- and medium-sized pharmaceutical companies**. The two regions with the **highest turnovers** are the **Donau-Iller** region (around Ulm and Biberach) and the **Rhine-Neckar** region (Mannheim/Heidelberg).

¹ WifOR Institute on behalf of BIOPRO Baden-Württemberg GmbH (2021): Untersuchung des ökonomischen Fußabdrucks der industriellen Gesundheitswirtschaft in Baden-Württemberg

Biotechnology

Biopharmaceutical production made in Baden-Württemberg

Biotechnology – a cross-sectional technology – is an **important driver of innovation** for the pharmaceutical industry. Baden-Württemberg is currently home to **188 biotech companies**. In 2019, they generated a turnover of **3.98 billion euros** and employed **18,867 people**. The region between Laupheim, Ulm and Biberach is particularly well-known for **developing and producing biopharmaceuticals**. Around **half of the employees and turnover** of Baden-Württemberg biotechnology companies are employed/generated here.



Foundation of biotechnology companies in Baden-Württemberg between 2010 and 2020

Biotechnology

Close to science, dynamic

Biotechnology companies founded in Baden-Württemberg between 1/2020 and 7/2021

	Company	City	Field of activity
	Aptamimetics GmbH	Stegen	Services
	Axxelera UG	Karlsruhe	Bioinformatics
	Cytolytics GmbH	Tübingen	Bioinformatics
2020	Fast Forward Discoveries GmbH	Mannheim	Consumables and devices
	HD Therapeutics	Ketsch	Therapeutics
	Panosome GmbH	Heidelberg	Therapeutics
	Variolytics GmbH	Stuttgart	Analytics, devices, services

Since 2010, more than **83 medical biotechnology companies have been founded** in Baden-Württemberg. BIOPRO supports start-up teams through consulting, start-up events, initiating cooperation and public relations.

The „**EXI Start-Up Voucher**“ consulting programme plays a central role. It can be used by founders from all high-tech fields who wish to participate in a **two-stage consulting programme**.

More information at:



www.bio-pro.de/en/service/start-up-support



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Read more here!

[www.gesundheitsindustrie-bw.de/en/
facts-and-figures](http://www.gesundheitsindustrie-bw.de/en/facts-and-figures)



Contact: Dr. Claudia Luther, E-mail: luther@bio-pro.de

Methods: Based on the entries in BIOPRO's company database, the Baden-Württemberg Statistics Office determined the key figures for taxable turnover and employees for the 2019 reporting year. The company database lists biotechnology, medical technology and pharmaceutical companies that research, develop and/or produce in Baden-Württemberg. Companies that are active in more than one sector are only counted once in the total figure. The figures relating to gross value added, employees, working population and turnover refer to 2019.

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