

## Facts and Figures 2019

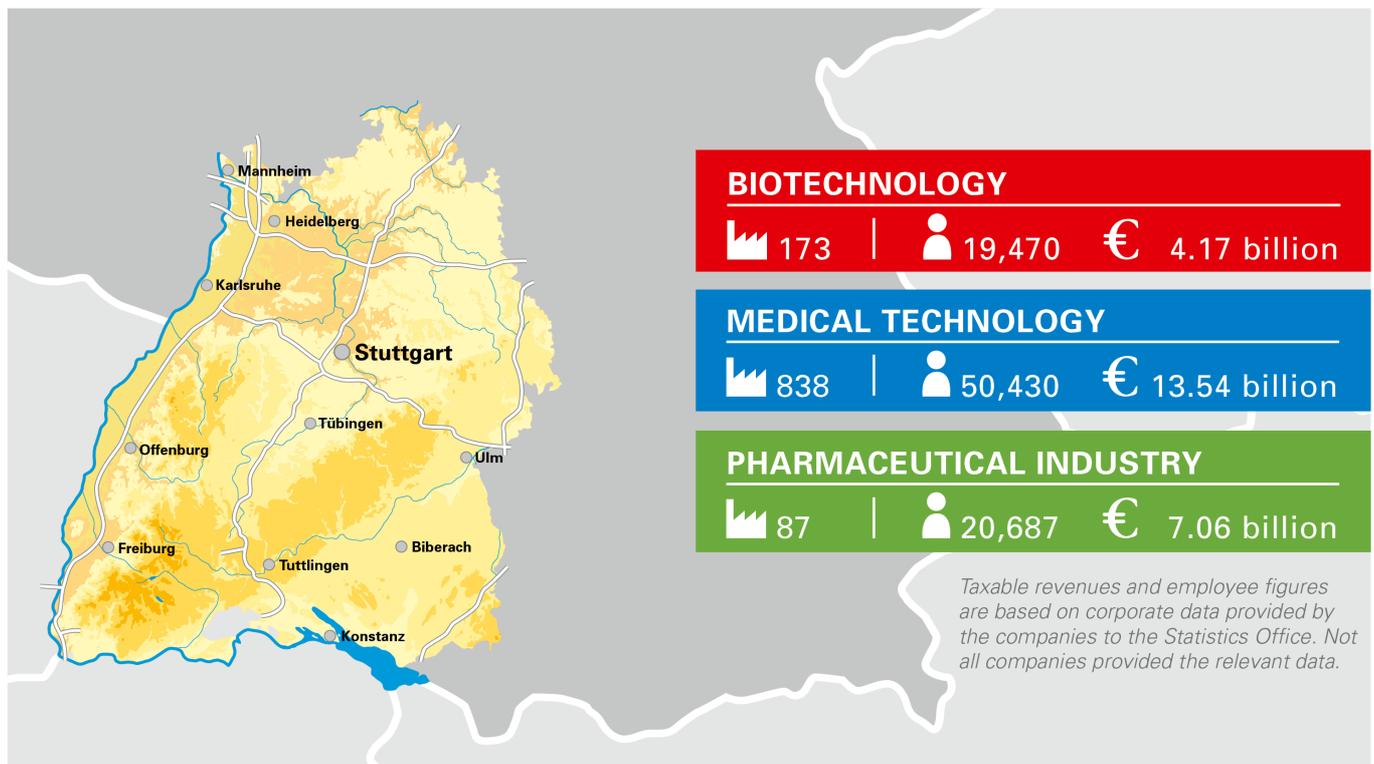
# The healthcare industry in Baden-Württemberg – innovative, dynamic and rich in tradition

**The healthcare industry drives innovative growth in the healthcare sector. The new facts and figures for the healthcare industry in Baden-Württemberg once again show the high status of the medical technology, biotechnology and pharmaceutical industry sectors. "As digitalisation becomes more important, one of our key focus areas is artificial intelligence due to the enormous opportunities that it offers in the field of medicine. At the same time, the healthcare industry is facing major challenges because of new regulatory requirements," said Prof. Dr. Ralf Kindervater, CEO of BIOPRO Baden-Württemberg. The healthcare industry, with all it represents in terms of innovation and inventiveness, is an important core area of Baden-Württemberg's economy. This is made all the more evident from the facts and figures published in 2019.**

## The Baden-Württemberg healthcare industry in numbers

BIOPRO Baden-Württemberg identifies 1,078 healthcare industry companies that are actively involved in research, development and/or production in the region. Companies active in several economic sectors are only counted once on the list. In 2017, these companies had a total of 90,587 employees and generated 24.8 billion euros in taxable revenues. Baden-Württemberg's characteristic mix of small, medium-sized and large companies guarantees the stability of the region's healthcare industry. Labour productivity figures and the number of skilled jobs also reflect stability and innovative capability.

## MDR emergency aid programme to support the medical device industry



Taxable revenues and employee figures in the healthcare industry in Baden-Württemberg were calculated by the Baden-Württemberg Statistics Office on the basis of data held in the BIOPRO company database, as long as the relevant data had been submitted to the Statistics Office at the time of the survey. The data used in the survey were taken from 2017. BIOPRO's company database currently lists 173 biotechnology companies, 838 medical technology companies and 87 companies in the pharmaceutical industry, all of which carry out research, develop and/or produce in Baden-Württemberg (as of 7/2019). Figures were extracted for 143 biotechnology companies, 797 medical technology companies and 84 pharmaceutical companies. Wherever the survey found companies active in more than one sector, the key figures (revenues and employee numbers) are listed on a pro data basis.

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According to the SPECTARIS industry association, Baden-Württemberg is the number one medical technology location in Germany by number of companies. Surveys by BIOPRO Baden-Württemberg show that Baden-Württemberg is currently home to 838 medical technology companies that are active in research, development and/or production. In 2017, Baden-Württemberg medical technology companies had a total of 50,430 employees and generated 13.5 billion euros in taxable revenue. This corresponds to a 4% increase in revenue compared to the previous year. 96% of the companies have less than 250 employees. These small and medium-sized enterprises are facing major challenges with the new European Medical Device Regulation (MDR) and In-vitro Diagnostics Regulation (IVDR). In summer 2019, the Baden-Württemberg Ministry of Economics, Labour and Housing provided funds for an MDR emergency aid programme to help the region's medical technology industry prepare for MDR implementation. The programme covers various measures that will be implemented between 2019 and 2021. The goal is to offer user-friendly support services that help companies save time and resources. As a central point of contact for companies, research institutes, clusters and networks in the healthcare industry, BIOPRO Baden-Württemberg coordinates the programme. Baden-Württemberg has a diverse medical technology industry with a spectrum ranging from traditional medical technology such as surgical instruments, implants, endoscopes, dental products and patient diagnostics to eHealth and telemedicine applications. The highest regional concentration of medical technology companies is to be found in the Scharzwald-Baar-Heuberg region around the city of Tuttlingen.

# Biotechnology as important driver of innovation in the pharmaceutical industry

Biotechnology is an important driver of innovation in the pharmaceutical industry. According to the Association of Research-Based Pharmaceutical Companies, the 38 new biopharmaceuticals in 2018 meant that the number of new biopharmaceutical approvals was higher it had ever been. According to surveys by BIOPRO Baden-Württemberg, a total of 256 Baden-Württemberg companies are active in research, development and/or production in the region's biotechnology and/or pharmaceutical industries. In 2017, 40,157 employees generated 11.2 billion euros in taxable revenues.

According to a report by BIOCOM AG, Baden-Württemberg is the largest biotechnology location in Germany in terms of the number of companies. Surveys by BIOPRO Baden-Württemberg show that Baden-Württemberg is currently home to 173 biotechnology companies. This includes all companies that are active in biotechnological research, development and/or production, including biopharmaceutical companies. The majority of biotechnology companies are active in the field of analytics (39%), biotechnology services (35%), consumable supplies and equipment (32%). The development of biotechnologies therapies, an area in which 31% of companies are active, makes a significant contribution to innovative treatment options in healthcare. Innovative spin-offs from the numerous universities and research institutions in Baden-Württemberg reflect the region's inventiveness. 35 biotechnology companies were founded between 2015 and 2018. Even though the number of new start-ups in 2018 was down on the previous year, a report by Ernst & Young GmbH found that Baden-Württemberg, together with Berlin, ranks second of all German states when it comes to establishing new companies.

With 19,470 employees, the Baden-Württemberg biotechnology companies generated taxable revenues of 4.2 billion euros in 2017. 96% of companies employ less than 250 employees, while 49% have less than 10 employees. Six companies with over 250 employees generate 86% of taxable revenues. Most biotechnology companies are located in the Rhine-Neckar region. The two regions with the highest revenues are Donau-Iller and Rhine-Neckar.

The pharmaceutical industry is a strong driver of employment in Baden-Württemberg. According to the Federal Association of Pharmaceutical Manufacturers, Baden-Württemberg is Germany's largest pharmaceutical location, measured by the number of employees. According to BIOPRO Baden-Württemberg, there are 127 pharmaceutical companies in Baden-Württemberg. 40 of the companies are pure distributors or suppliers, and 87 carry out research, development and/or manufacturing in Baden-Württemberg. The majority of the companies are active in the fields of phytopharmaceuticals (25%), homeopathic medicines (23%) and traditional medicines (22%). According to the Baden-Württemberg Ministry of Economics, Labour and Housing, Baden-Württemberg is Europe's leading location for producing and distributing medicines for special therapies such as homeopathy as well as herbal ingredients.

In 2017, the pharmaceutical companies, with a total of 20,687 employees, generated 7.1 billion euros in taxable revenue, an increase of 6% over the previous year. Danube-Iller and Rhine-Neckar are the two regions with the highest revenues. 18 companies with more than 250 employees generated 67% of all taxable revenue. According to the Federal Association of the Pharmaceutical Industry, the proportion of research and development expenditures in Germany's GDP is 14 percent, reflecting the complicated and strictly regulated drug development and approval procedures.

Once again this year, BIOPRO Baden-Württemberg will be at MEDICA 2019 (Hall 15 L16 / L17

where you will be able to find the latest facts and figures for 2019 for the medical technology, biotechnology and the pharmaceutical industry sectors in Baden-Württemberg.

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- ▶ [Healthcare industry BW – Industry report 2019](#)