

» Project partners

Alcon

a Novartis company

NOVARTIS

Pfizer

**Boehringer
Ingelheim**

Roche

**Industriegewerkschaft
Bergbau, Chemie, Energie**
BCE

Takeda

» Glossary

Labour productivity	Corresponds to the gross value added produced per person employed
Gross value added	Total value of all goods and services produced that are not used within the production process, less intermediate expenditure. The GVA is the basis for the calculation of gross domestic product.
Working population	According to national accounts, all persons who carry out activities for the purpose of economic gain as an employee or as a self-employed person or as a family worker, regardless of the scope of this activity.
Intermediate expenditure	Value of goods and services used, processed or converted in the production process.
Core area	All goods in industrial healthcare according to definition of official health expenditure accounts
Extended area	Additional health-related goods in industrial healthcare
Direct effect	Immediate economic effects from the sector that impact the national economy
Indirect effect	Effects caused by intermediate expenditure by the companies within one sector on other industries in the national economy
Induced effect	Effects created as a result of the re-overspend of directly and indirectly generated income in the economy as a whole

BIO PRO
Baden-Württemberg GmbH

BPI Landesverband
Baden-Württemberg

Baden-Württemberg
MINISTERIUM FÜR FINANZEN UND WIRTSCHAFT

» Imprint

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BIOPRO Baden-Württemberg GmbH

Chief Executive Officer: Prof. Dr. Ralf Kindervater

Breitscheidstraße 10, 70174 Stuttgart

Phone: +49 (0) 711 - 21 81 85 00, Fax: +49 (0) 711 - 21 81 85 02

E-mail: info@bio-pro.de, www.bio-pro.de

BIO PRO
Baden-Württemberg GmbH

Project management

Dr. Barbara Jonischkeit, Dr. Claudia Luther (BIOPRO)

Authors

Dr. Dennis A. Ostwald, Benno Legler, Marion Cornelia Schwärzler (WifOR*)

Project partners

- » ALCON Pharma GmbH
- » BPI Landesverband Baden-Württemberg
- » Boehringer Ingelheim Pharma GmbH & Co. KG
- » IG BCE Industriegewerkschaft Bergbau, Chemie, Energie
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Contact:

WifOR, Rheinstraße 22, 64283 Darmstadt, www.wifor.de



The economic footprint of the healthcare industry in Baden-Württemberg

Key findings for 2014

The economic footprint of the healthcare industry in Baden-Württemberg

Baden-Württemberg is one of the most important locations for the healthcare industry in Germany: companies involved in the pharmaceutical industry, medical technology and biotechnology all have manufacturing plants in Baden-Württemberg and make a huge contribution to the economic development of the State. In addition to the multinational companies, a number of small and medium-sized enterprises also contribute a great deal to growth and employment.

The economic footprint illustrates this significance for the first time on the basis of economic figures. As well as the direct effect of the healthcare industry, the integration of the industry with the economy of Baden-Württemberg as a whole is thereby brought into focus.

» Study design/methodology

This investigation takes as its starting point the commodity-specific delimitation and hence the definition of the healthcare industry on the basis of the national health-economic accounts of the Federal Ministry for Economic Affairs and Energy. It includes the pharmaceutical industry, medical technology and biotechnology and related research and development activities, and also trade and distribution. In addition, the wider field includes health-related sports and fitness equipment, body, oral and dental care products, and the e-health area.

By analogy with the health-economic accounts, there is also, for the first time at State level, a depiction of the healthcare industry in the categories of the national accounts, and a determination of the direct economic effects. The interdependencies of the industry with the general economy of Baden-Württemberg are shown by means of a regional input/output table, and quantified by means of indirect and induced effects. In addition to the direct effects of the industry, the reporting of intermediate expenditure also gives an indication of the economic stimulus generated by the healthcare industry, and hence its wider significance for Baden-Württemberg as a business location.

The role of the healthcare industry in relation to the State's international trade is also presented; and specific analysis by the State Statistical Office and the Federal Employment Agency produces an assessment of the significance of small and medium-sized enterprises within the healthcare industry.

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» Gross value added

Baden-Württemberg is an **IMPORTANT PRODUCTION LOCATION** for the **HEALTHCARE INDUSTRY**



	Production	Distribution + wholesale	
Core area	6.3 billion euros	2.1 billion euros	
Extended area	2.8 billion euros	2.6 billion euros	
	9.1 billion euros	4.7 billion euros	13.8 billion euros

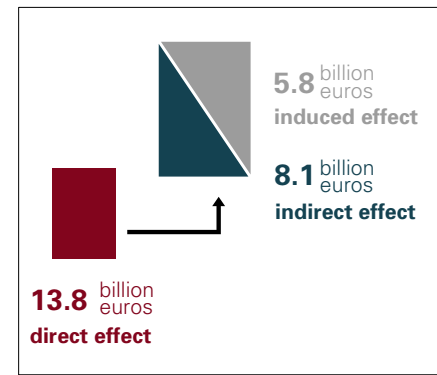
The healthcare industry is a **GROWTH INDUSTRY** for the economy of Baden-Württemberg

+3.9 billion euros increase in gross value added between 2004 and 2014



2.2% Ø growth p.a. between 2004 and 2014, adjusted for price

27.8* billion euros total effect

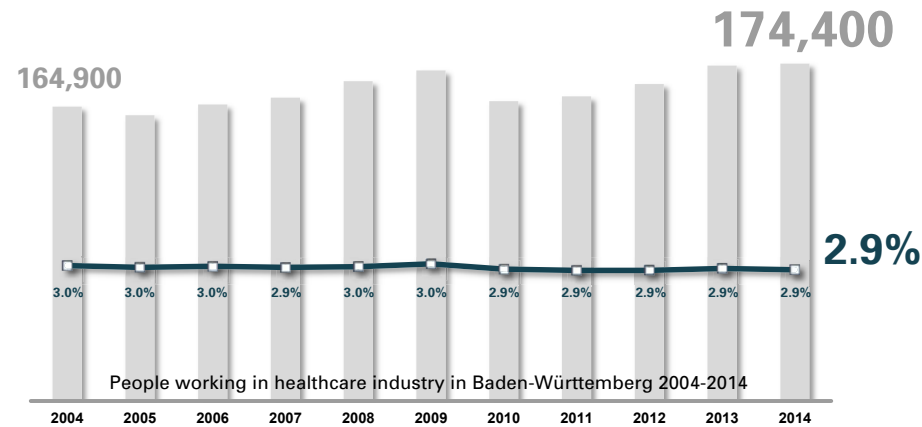
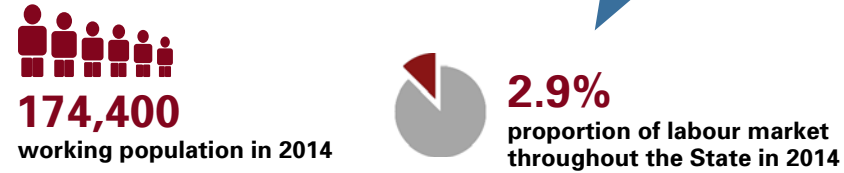


* Difference due to rounding

"One euro of gross value added in the healthcare industry generates another euro of gross value added in other sectors of the economy."

» Working population

The **HEALTHCARE INDUSTRY** stands for **STABILITY** in the **LABOUR MARKET**



"In spite of difficult conditions in the domestic market, the healthcare industry remains rooted in the area."

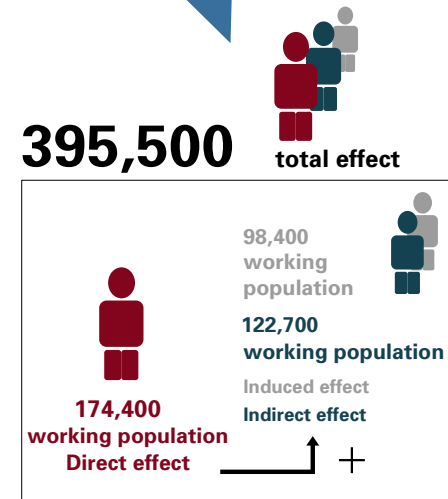
The healthcare industry is the **ENGINE FOR EMPLOYMENT** in Baden-Württemberg

+9,500 additional working population since 2004



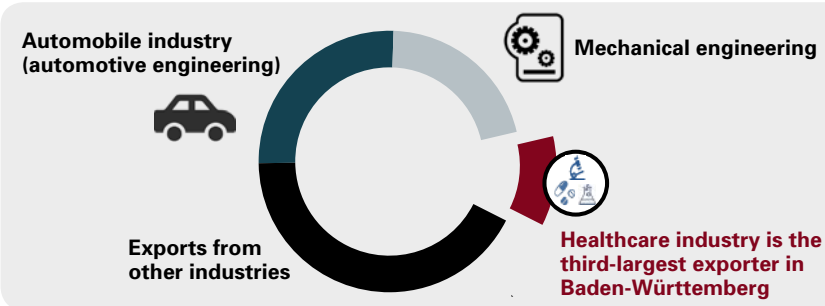
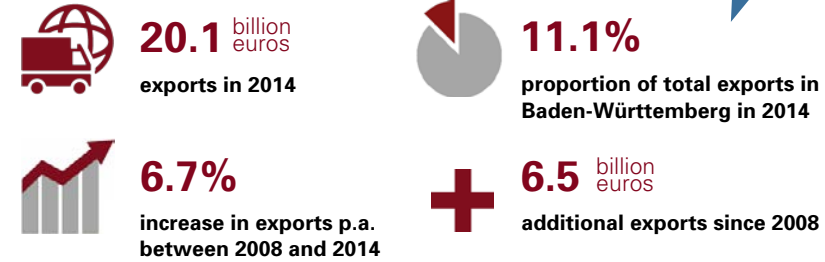
0.6% growth p.a. between 2004 and 2014

"One job in the healthcare industry requires 1.26 further jobs in the economy as a whole."



» International trade

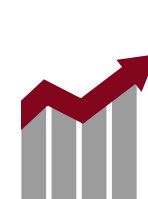
The **HEALTHCARE INDUSTRY** is in great demand as an international trade partner, and is the third-largest exporter in Baden-Württemberg



"Every ninth euro from export sales in Baden-Württemberg comes from the healthcare industry."

The **HIGH** and growing **LABOUR PRODUCTIVITY** of the healthcare industry results in a growing economy and hence prosperity

1.6% annual increase in labour productivity between 2004 and 2014



+21.2%

higher labour productivity than in the entire economy of Baden-Württemberg

"Qualified staff and modern working processes generate the above-average increase in labour productivity."

» Company structure

SMEs AND LARGE COMPANIES are the two strong pillars of the healthcare industry in Baden-Württemberg

Small and medium-sized enterprises



1-249 employees

€ **6.8 billion euros** gross value added in 2014

110,800 working population in 2014

49.1% proportion of gross value added

63.6% proportion of working population



5.7 percentage points

stronger growth of labour productivity than in the economy as a whole since 2008

Large companies



250+ employees

€ **7.0 billion euros** gross value added in 2014

63,600 working population in 2014

50.9% proportion of gross value added

36.4% proportion of working population



9.3 percentage points

stronger growth of labour productivity than in the economy as a whole since 2008