

Germany Pharmaceutical 3PL - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029

Market Report | 2024-02-17 | 150 pages | Mordor Intelligence

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Report description:

The Germany Pharmaceutical 3PL Market size is estimated at USD 2.01 billion in 2024, and is expected to reach USD 2.49 billion by 2029, growing at a CAGR of 4.47% during the forecast period (2024-2029).

Key Highlights

-COVID-19 obviously had a positive impact on the market. The German pharmaceutical market's clinic and pharmacy section had grown by over 7% to EUR 49.5 billion in 2020 (USD 55.9 billion). Vaccines and diagnostics are also included in this section. According to an industry report, the amount of counting units, such as tablets, sachets, and injections, decreased slightly (-0.6 %) to 97.5 billion counting units. From March to May 2020, exports of Germany's pharmaceutical industry climbed 14.3% Y-o-Y to EUR 22.1 billion (USD 25.3 billion), according to the Federal Statistical Office (Destatis). This increased the demand for pharmaceutical 3PL services in Germany during the pandemic.

-According to Germany Trade and Invest (GTAI), Germany has the largest pharmaceutical market in Europe and the fourth largest globally. The country is regarded as one of the world's leading pharmaceutical manufacturing locations, and its highly skilled workforce enables pharmaceutical companies to work on more complex and demanding commodities such as biosimilars while maintaining high production quality. Germany remains the second-largest producer of active biopharmaceutical substances approved by the European Union (EU). South Germany's BioPharma Cluster is one of the world's major biopharmaceutical development and production hubs. The cluster is one of the major European production sites for active biopharmaceutical components approved in Europe.

-In 2020, Germany accounted for 4.5% of global pharmaceutical production. Pharmaceutical value-added output is estimated to have grown by 4% in 2022 and is forecasted to grow by more than 2% in 2023, after increasing by 5.2% in 2021. Healthcare growth remained robust in 2022. Covid-19 vaccines have mainly driven demand, while at the same time, producers of cold medicines have recorded lower sales, as physical distancing and mask-wearing reduced the number of related diseases. There is

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still a backlog of non-Covid related medical treatments and spending on drugs. However, a rebound is underway, and non-Covid related pharmaceuticals output will benefit 2023.

-Mid-and long-term demand for pharmaceuticals will be driven by demographic developments. The progressive aging of Germany's population will require an increase in medical treatments, in particular for chronic diseases. This will mainly benefit producers of specialty products, but also manufacturers of generic drugs. In turn, contributing to 3PL demand. The German healthcare market is highly regulated, and the legislative pressure on pharmaceutical businesses to lower their sales prices of drugs for end-consumers is not overly high. Profit margins of both producers and pharmacies have increased in 2021, which encourages new players to enter the pharma sector. With more players entering the pharma sector in Germany the demand for 3PL services will continue to increase. Seeing the positive outlook of the market, 3PLs from neighboring countries are entering the market through mergers and acquisitions to benefit from the market growth. For example, Geodis expanded its premium express services with the acquisition of Trans-o-Flex, based in Weinheim, Germany. Privately held Trans-o-Flex has around 80 locations in Germany and Austria that are rated with certified good distribution practices (GDPs), and has been serving pharma, cosmetics, automotive, and high-tech industries with time-definite and temperature-controlled delivery. According to Geodis, this acquisition will position Geodis as a leading player in the healthcare market and will significantly enhance its delivery capabilities in Germany, a country at the heart of global trade.

Germany Pharmaceutical 3PL Market Trends

Increasing Popularity of Online Pharmacies to Support the Market Growth

In recent years, online pharmacies have grown in popularity due to the rising internet penetration and the increasing prevalence of chronic diseases in developing countries. Due to the availability of high-speed internet and the rising awareness of online over-the-counter benefits, Germany is the fastest-growing market in Europe. Online pharmacy is one of Europe's most popular advancements in both emerging and established countries. The Online pharmacy sector benefitted from the COVID-19 pandemic. Customers flocked in droves and began to exhibit a keen interest in online drug transactions. Initiatives taken by the German government in the healthcare sector are also supporting the online pharmacy industry. One of them, the electronic prescription process is intended to save healthcare providers and patients time, effort, and travel in the German healthcare system in the future. It is also intended to increase the safety of drug therapy for patients.

Once the rollout process has been completed nationwide, the obligation to prescribe digitally will then also apply to all healthcare providers across Germany: patients will then receive a prescription code together with intake and dosage instructions displayed in the gematik app after their medical consultation or video consultation. They can choose to show and redeem the prescription code at a pharmacy of their choice or redeem it at an online pharmacy for delivery. apo.com Group is currently the fastest-growing online pharmacy group in Germany. While the online pharmacy market grew by only 1.4% in 2022 during the current crisis and following Corona, the apo.com Group brands grew by over 30%. This enabled the group to increase its market share from 7% to over 11% in 2022. With the increasing popularity of online pharmacies in Germany the 3PL demand for pharmaceuticals will continue to rise.

Biopharmaceuticals to Contribute in Market Expansion

Biopharmaceuticals are drugs whose active ingredients are produced with the help of genetically modified organisms. Biopharmaceuticals can relieve or permanently cure many diseases for which there were previously no or only partially successful treatment options. These include anemia, multiple sclerosis, and rheumatism. In the areas of immunology, metabolism, oncology, and diseases of the central nervous system, new product innovations are constantly being added. Germany is the second-largest producer of European Union (EU) certified active biopharmaceutical substances; Nationwide sales of biopharmaceuticals amounted to around EUR 14.6 billion (USD 15.86 billion) in 2020 out of around EUR 47.5 billion (USD 51.60 billion) in total

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pharmaceutical sales. In 2020, sales of biopharmaceuticals in Germany increased by around 6% compared to the previous year. In 2021, sales of biopharmaceuticals in Germany increased by around 10.2% compared to the previous year 2020. Nationwide sales of biopharmaceuticals amounted to around EUR 16.1 billion (USD 17.49 billion) in 2021 out of around EUR 51.4 billion (USD 55.84 billion) in total pharmaceutical sales.

The biopharma cluster in South Germany is a leading biotech hub and the global foundation of biopharmaceutical development and production. Nearly half of all EU-certified, active biopharmaceutical ingredients in Germany are produced in the BioPharma Cluster South Germany. The region between the German city of Ulm and Lake Constance is one of the highest-grossing and most important research, development, and production areas of the country's pharmaceutical industry. It has more than 100 biotechnological, pharmaceutical and medical technology companies and research institutions. Biotechnology is becoming a branch of the future, leading the way for the entire pharmaceutical sector. In Germany alone, the number of approved biopharmaceuticals has doubled between 2005 and 2018 to a total of now 311 certified ingredients. This indicates a positive outlook for the biopharmaceuticals sector in Germany. The growth of biopharmaceuticals in Germany will increase the demand for pharmaceutical 3PL services in the country adding to the market growth.

Germany Pharmaceutical 3PL Industry Overview

The German pharmaceutical third-party logistics (3PL) market is competitive in nature. As pharmaceutical logistics requires a high level of specialization, government approvals, cutting-edge technology, a wider network coverage, and a lot of know-how, given the delicacy of the goods transported, the market has a comparatively smaller number of players. The leading players in the market include DHL Logistics, Ceva Logistics, MSK Pharma Logistics, and Biotech and Pharma Logistics. These players offer faster transportation opportunities and warehousing with specialized storage facilities, gaining a competitive advantage. The market is fragmented in nature considering that the major players do not hold most of the market share.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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