

Germany Pharmaceutical Warehousing - 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 Warehousing Market size is estimated at USD 4.23 billion in 2024, and is expected to reach USD 5.46 billion by 2029, growing at a CAGR of greater than 5.25% during the forecast period (2024-2029).

The German market for warehousing and logistics space recorded a total take-up result of around 8.5 million sq m in 2022. Most demand for space came from distribution/logistics companies, with 34%, followed by retailers with 29%.

The main logistics regions in Germany are Hamburg, Berlin, Hannover, Munster, Bremen, Leipzig, Kassel, Dusseldorf, Frankfurt, Nuremberg, Mannheim, Karlsruhe, Stuttgart, and Munich.

Besides the shortage of space, increased construction costs were a major factor behind the rise in prime rents for warehousing space larger than 5,000 sq m in all Big 5 regions over the last twelve months.

Although the second half of 2022 was weaker than the first in terms of take-up, 2022 as a whole was very successful for the Berlin market. Around 1,119,300 sq m of warehousing and logistics space was taken up in lettings and owner-occupier deals, up 82% on the previous year (615,900 sq m).

The industry ranking in 2022 as a whole was led by manufacturing with 43%. Retailers and E-commerce companies followed in second place with 28%. It is due to the conclusion of a number of deals, including lettings by Sonepar of around 41,300 sq m and Lidl of around 39,000 sq m in Werder, and the deal struck by Picnic in Ludwigsfelde (approx. 32,000 sq m). The largest deals in the distribution/logistics sector were concluded by Schnellecke Logistics in Rangsdorf, with around 32,700 sq m, and VAH Jager in Oberkramer, with around 30,000 sq m.

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Germany Pharmaceutical Warehousing Market Trends

Growth of E-commerce in the market

Germany is Europe's e-commerce leader, offering a myriad of opportunities for international online retailers and service providers alike. During the period 2017 to 2022, B2C e-commerce grew by 69%, from EUR 58.5 billion to EUR 99.1 billion (USD 63.59 Billion to USD 107.72 Billion). With 58 million people, 84% of the German population over the age of 16, are purchasing online regularly. Germany boasts not only the most internet users in Europe but also the greatest e-commerce customer potential.

In its December 2021 coalition agreement, the new federal government declared the digital transformation of Germany's healthcare system to be a priority. It announced the development of a national e-health strategy. Priorities include realignment of the telematics infrastructure and continued national implementation of electronic patient records and e-prescriptions.

As of 2022, 99% of pharmacies were connected to the telematics infrastructure, a significant increase from 75% in 2021. However, 87% of pharmacists worry that the e-prescription program will prompt greater competition from online and mail-order pharmacies.

German citizens and patients are most interested in the convenience and flexibility of digital health solutions. In a 2022 survey by Doctolib, best known for its online appointment-booking platform, 66% of patients indicated their interest in using online booking, 58% e-prescriptions, and 55% digital transmission of diagnostic results.

Increase in export and import of pharmaceuticals

The German industry is ahead of the French, Italian, and Great Britain markets. Germany's share of the total global pharmaceutical value stood at 5.9% of the pharmaceutical industry worldwide. Germany holds more than 510 pharmaceutical companies and more than 670 biotechnology companies. The industry manufactured medicines and pharma equipment worth EUR 31.1 billion (USD 33.81 Billion) at the beginning of the COVID-19 pandemic.

With EUR 131.2 billion (USD 154.4 billion) generated through foreign sales, HCT contributes 8.3% to Germany's total exports. The expected CAGR of the German medical equipment market for 2020-2025 is 5.1% in euro terms and 6.8% in USD terms. The value of pharmaceuticals imported into Germany was approximately EUR 71 billion (USD 76 billion) in 2021. It means Germany holds a positive trade balance in the pharmaceutical market as its exports are worth more than its imports.

In Germany alone, the pharmaceutical industry spends over EUR 6.2 billion (USD 6.6 billion) annually on research and development (R&D), or EUR 15 million (USD 16 million) each day. It demonstrates that Germany is among the top research destinations for pharmaceutical businesses with a global presence.

Germany Pharmaceutical Warehousing Industry Overview

The Germany Pharmaceutical Warehousing market is fragmented in nature, with a mix of global and local players. Most of the imports and exports products need to be monitored in refrigerated transports. Vendors are implementing various strategies, such as strategic alliances, partnerships, mergers and acquisitions, geographical expansion, and product/service launches, to enhance their presence in the market.

Major players include XPO Logistics Inc., CDS Hackner GmbH, GXO Logistics, and Wagner Group GmbH.

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Additional Benefits:

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

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