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Gesundheitsindustrie
Hessen

HESSEN



TECHNOLOGIELAND
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Key economic figures of the Health Economy in Hesse



Foreword by the Prime Minister of Hesse Volker Bouffier



Many of us only pay attention to the healthcare industry in case of illness and the need for a wide range of services, medicines and other remedies. The results of the inaugural 2017 study on the economic significance of the industrial health economy have been reaffirmed: The industry and its entire value chain make a major contribution to wealth and prosperity in the state of Hesse.

The industrial health economy provides continuous and highly productive employment that has a significant impact throughout Hesse. It secures employment for many individuals, is a key manufacturer for the health economy and a cornerstone of the overall economy in our state. Research and development contribute to Hesse's expertise and knowledge base. The full spectrum of products – from human pharmaceuticals and medical products to e-health applications – are available in the state.

In order to disseminate this message throughout Europe and the rest of the world, we must continue to show substantial commitment (on a national and international level) to maintain the competitiveness of our Hessian business location and successfully address any challenges. We want to do particularly well in the field of innovation.

Since 2013, the Hessian state government has been working with companies of the Hessian healthcare industry, the Hesse-Thuringia district of the Mining, Chemical and Energy Industrial Union and representatives from science and research in the Initiative Health Industry Hesse to improve the supply of high-quality drugs and medical products to people, while securing sustainable and highly qualified new jobs.

We will closely coordinate our activities on state and federal level in the areas of research, health and economic policy in order to jointly strengthen and further expand the industry's strong foothold in Hesse.

A handwritten signature in black ink, which appears to read 'Volker Bouffier'.

Volker Bouffier
Hessian Prime Minister

The Federal Ministry for Economic Affairs and Energy (BMWi) (2019): Health Economy – Facts & Figures. Regional results of the National Health Account for Germany, Edition 2018.

All figures refer to the year 2017 (unless otherwise stated).

Growth rates and time series representations of gross value added are shown in nominal terms (in current prices). Time series presentations of gross value added are based on nominal key figures (in current prices). Growth rates (unless otherwise stated) refer to the period 2008 to 2017.

A pdf version of this brochure is available online at www.gesundheitsindustrie-hessen.de.

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Overview of key economic figures

Glossary

The economic significance of the Industrial Health Economy in Hesse

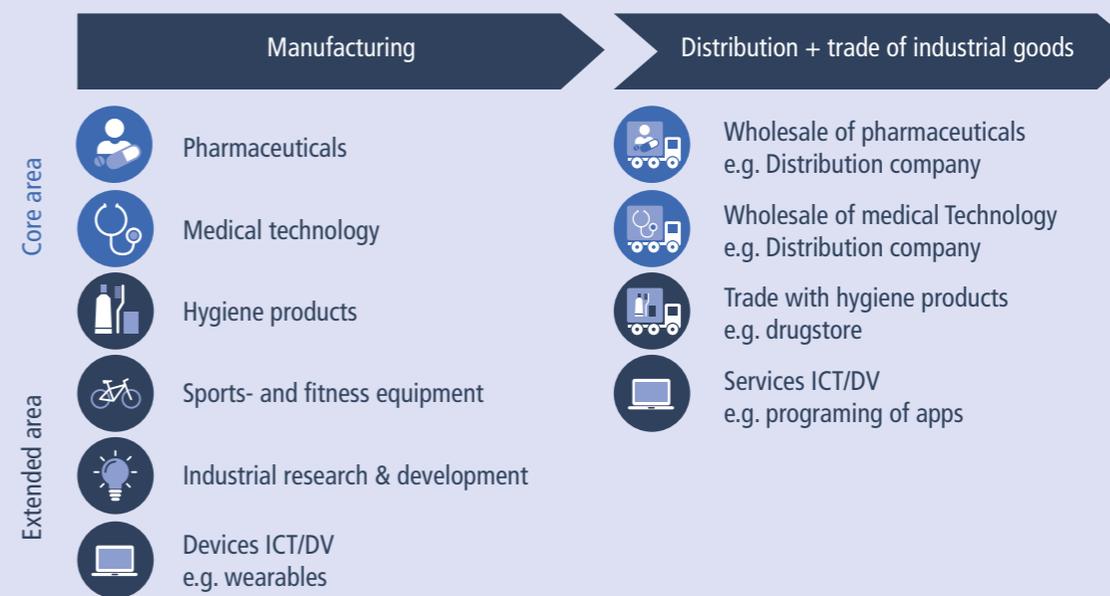
Structural importance of the industry

Health is considered one of the megatrends of the 21st century. In addition to demographic developments, increasing health awareness, among other things, is creating a high demand for health-related goods and services. The economic activities associated with healthcare – and thus the healthcare industry as a whole – have seen steady and above-average growth in recent years. The economic significance and development of the sector is regularly examined through the National Health Account (GGR) of the Federal Ministry for Economic Affairs and Energy (BMWi). According to this, the health economy is a growth and employment engine within the German economy and represents a stabilizing factor for Germany as a business location. This is one of the reasons why the health economy attracts a great deal of political attention in Germany and abroad.

Structural components of the industry

The health economy is a heterogenous sector that comprises various sub-sectors whose economic importance varies in different parts of Germany. This also applies to the industrial sub-sectors, which are grouped together in the so-called Industrial Health Economy (IGW). The IGW includes the manufacturing, distribution and wholesale of human pharmaceuticals, medtech, body, hygiene and care products as well as sports and fitness equipment. In addition, research and development as well as health-related information and communication technologies (e-health) belong to the industry.

Structural components of the IGW



Valid database for Hesse

Per the scope of the existing study, the IGW in Hesse has once again been examined in terms of its significance for growth, employment and foreign trade and presented using economic indicators that are in line with the facts and figures of the GGR. In addition to measuring the impact of the Hessian IGW on the national economy, the study focuses on the economic contributions made by research and innovation in Hesse. As a result, valid key figures on the comprehensive economic significance of the industrial health economy for the state of Hesse are now available. These are comparable nationally and regionally.

Notes on the present update and on deviations from the initial study:

The annual update of the National Health Account (GGR) is accompanied by a comprehensive recalculation of all key figures. This is because the present calculation is based on official key figures of the Federal Statistical Office, which are revised over time (most recently in the year of the update) and supported by additional data sources. In addition, conceptual adaptations and adjustments are made to the calculation and data collection models within the official data sources – the most important of which are the national accounts (VGR), the health expenditure account (GAR) and the health personnel account (GPR). On one hand, this makes an annual recalculation of the overall model of the national accounts over the entire period essential, but simultaneously allows methodological developments within the model itself to be made. The national accounts database (based on official national accounts data) has been updated three times since the initial project. In view of methodological and data-related changes, it is not appropriate to directly compare old and new figures. Instead, changes should always be analyzed on the same calculation basis.

**Key results
for the IGW**





Hesse is the national leader with regard to the growth and employment contributions of the IGW.



Gross value added (GVA)

10.5 bn EUR



4.2 %



2.8 %

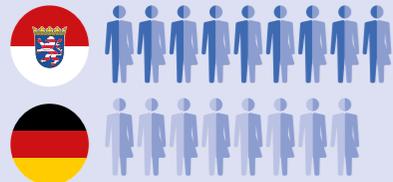
#1
of German states

The significance of the IGW for the overall economy of Hesse (4.2 % share of GDP) is much higher than in federal comparison (2.8 % share of GDP).



Employment

95,700



2.8%

2.3%

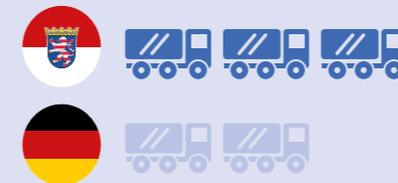
#2
of German states

The IGW is a major provider of continuous, stable employment in Hesse and of above average importance by national comparison.



Export

12.5 bn EUR



11.3%

7.7%

#4
of German states

The large share in Hessian exports indicates the international connectivity of the Hessian IGW. Every 9th euro of Hessian export is from the IGW.



**R&D expenditure
in the IGW in Hesse
is five times higher
than that
of the Hessian
economy.**



R&D intensity of the IGW national and regional comparison (2015)



Overall economy





For each euro of direct GVA generated by the IGW in Hesse, another

0.76 EUR is created in the wider economy.

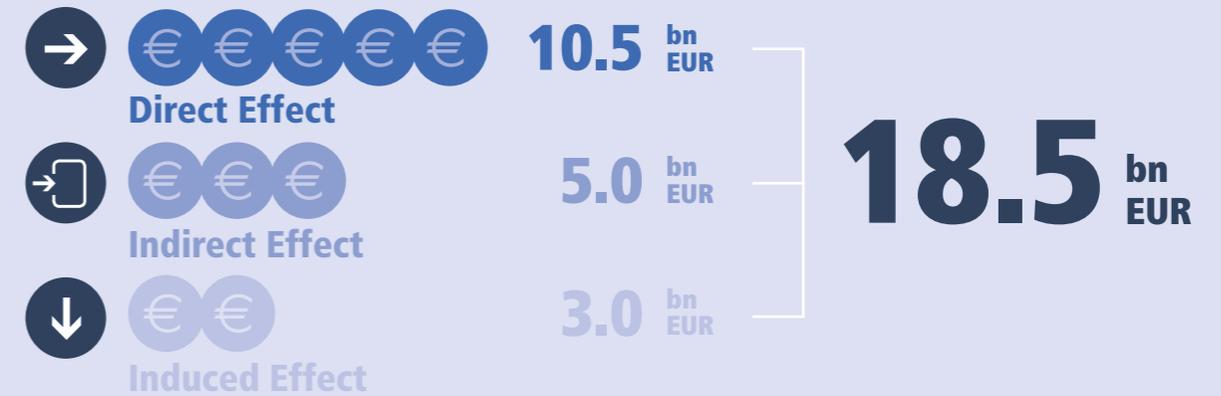


Comparative figure Germany

 **0.90** EUR



Total gross value added (GVA)



In the entire German economy, around 18.5 billion euro GVA are associated with the Hessian IGW. This is comprised of direct GVA amounting to 10.5 billion euro, indirect effects of 5.0 billion euro triggered by the purchase of supplies and induced effects of 3.0 billion euro triggered by the spending of wages.



Each directly employed person in the IGW in Hesse creates

another **1.12** employment relationships in the wider economy.

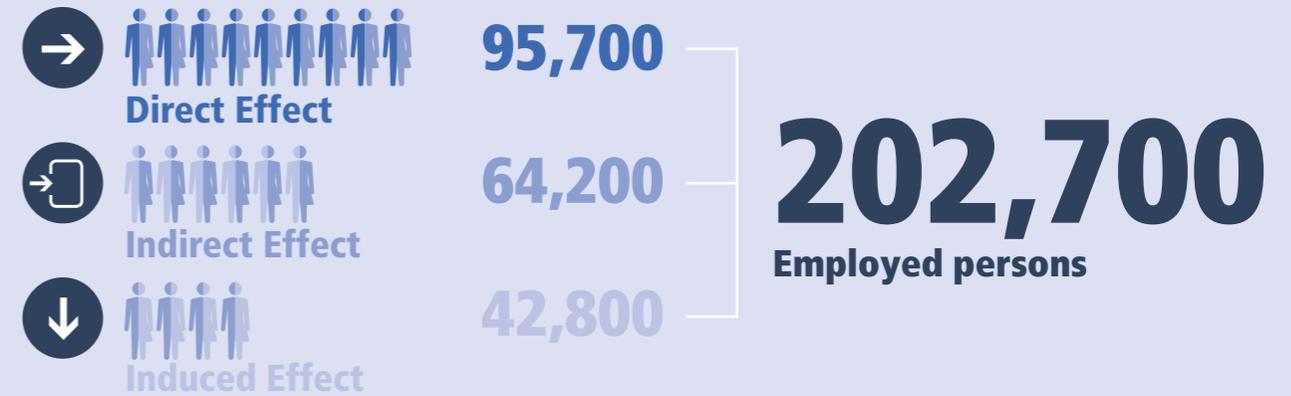


Comparative figure Germany

 **1.18** employees



Total employment



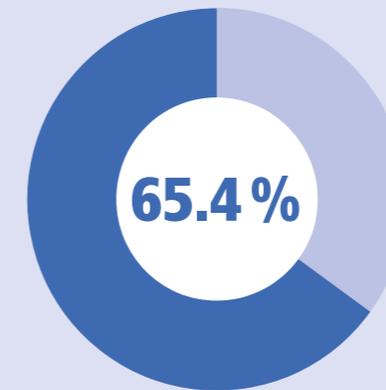
202,700 jobs are linked to the IGW in Hesse. This is comprised of 95,700 direct jobs, 64,200 indirect jobs (employees in enterprises supplying goods and services to the IGW) and 42,800 induced jobs (number of persons employed in other sectors producing consumer goods for employees in the IGW).


At 65.4%
of value added,
the IGW in Hesse
is clearly focused
on manufacturing.

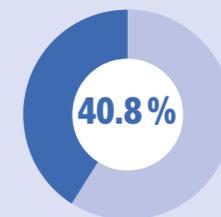
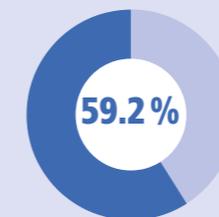
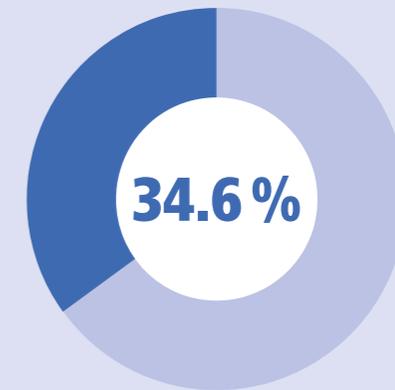



Key areas of value added creation

Manufacturing



Distribution + wholesale



Around two-thirds of GVA (6.9 billion euro) is generated in manufacturing sub-sectors of the industry.

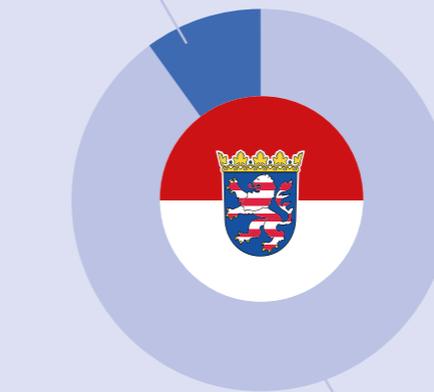


**Pharmaceutical and
medical technology
manufacturing
generates
10.3 %
of the manufacturing
industry's GVA
in Hesse.**

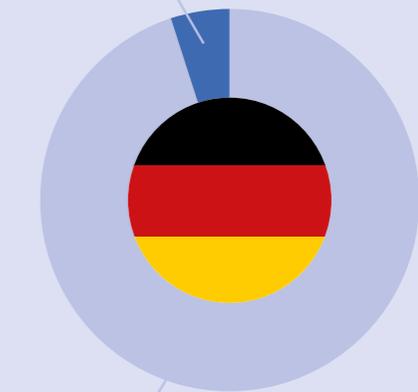


Key areas of value added creation

Core area
(manufacturing) Hesse
10.3 %



Core area
(manufacturing) Germany
5.4 %



rest of
manufacturing
industry

Every 10th euro of the manufacturing industry in Hesse stems from the manufacturing of pharmaceuticals and medical technology.
(Comparative figure for Germany: every 19th euro)



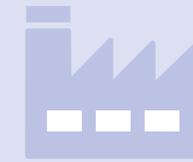
**SMEs generate
38 %
of the IGW's GVA
in Hesse.**



Gross value added small and medium-sized enterprises (SMEs)



SMEs
< 250 employees



Large enterprises
≥ 250 employees



Around 4.0 billion euro of added value is created by SMEs in Hesse.

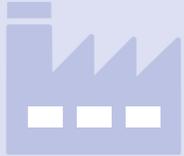
»» **62%**
of the IGW
workforce in Hesse
are employed
by SMEs.



Employment
small and medium-sized enterprises (SMEs)



SMEs
< 250 employees



Large enterprises
≥ 250 employees



SMEs employ around 59,300 people in Hesse.

Deep dive

Pharmaceuticals

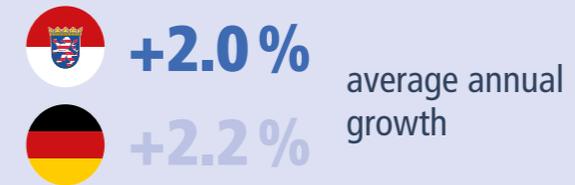




Every
3rd EUR
of IGW added
value in Hesse
is generated
by pharmaceutical
manufacturing.



Gross value added pharmaceuticals



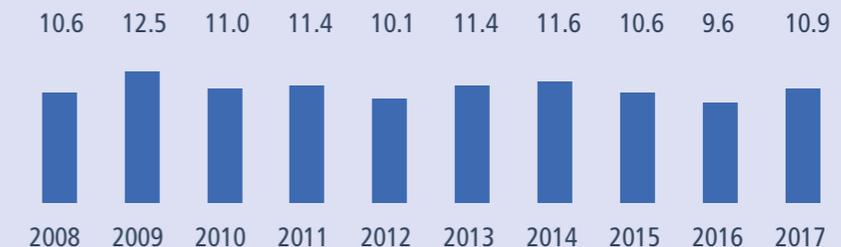
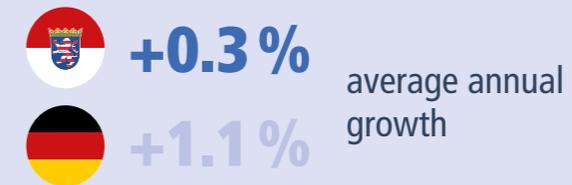
■ Gross value added in bn EUR

The value added directly generated by pharmaceutical manufacturing has increased by 0.6 billion euro since 2008 and amounted to approximately 3.6 billion euro in 2017.


11.4%
 of the IGW
 workforce in Hesse
 are employed in
 pharmaceutical
 manufacturing. 



Employment pharmaceuticals



■ Employment in thousands

Constant employment in pharmaceutical manufacturing has a stabilizing effect on the entire economy and illustrates the productivity gains in this sub-sector.

»» **6.6%**
of Hesse's
total exports
are from human
pharmaceuticals. ««



Export pharmaceuticals

 **+5.2%**
 **+6.0%** average annual
growth



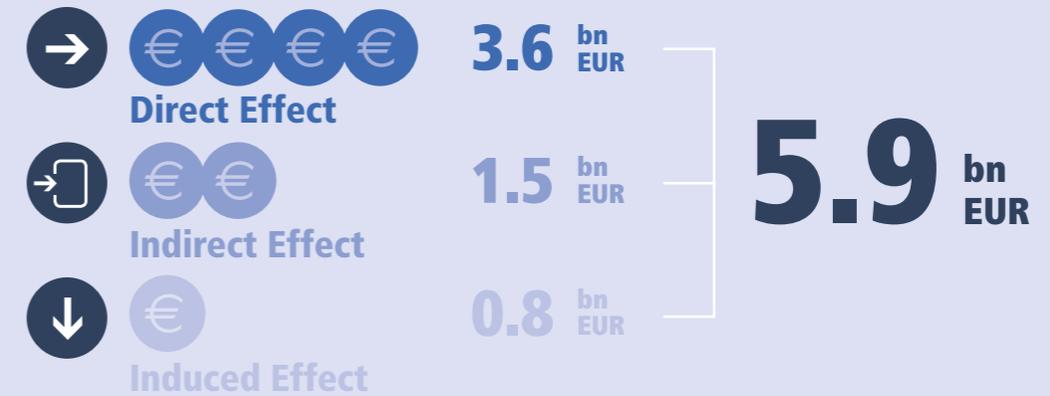
Pharmaceutical exports have increased by a factor of 1.5 since 2008. In 2017, they amounted to almost 7.3 billion euros.



**Pharmaceutical
manufacturing
in Hesse generates
2.3 bn EUR
incremental GVA
in the wider
German economy.**



Gross value added – spill-over effects pharmaceuticals



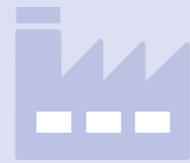
The total value added generated by pharmaceutical manufacturing amounts to approximately 5.9 billion euro. Each euro of direct GVA creates another 0.65 euro in the German economy.



Gross value added small and medium-sized enterprises (SMEs) pharmaceuticals



SMEs
< 250 employees



Large enterprises
≥ 250 employees



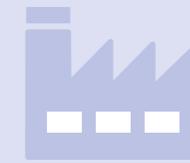
Hesse's SMEs contribute 8% to pharmaceutical manufacturing GVA.



Employment small and medium-sized enterprises (SMEs) pharmaceuticals



SMEs
< 250 employees



Large enterprises
≥ 250 employees



Approximately 13% of pharmaceutical manufacturing employees work in SMEs.

Deep dive

Medical Technology

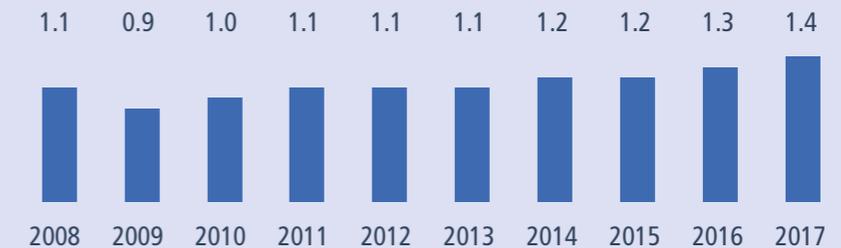
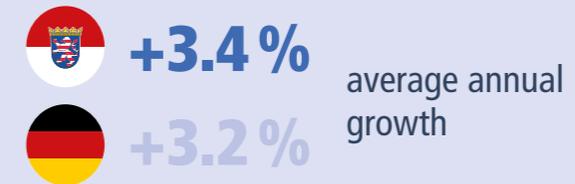




Medical technology
generates
13.8%
of the IGW's GVA
in Hesse.



Gross value added medtech



■ Gross value added in bn EUR

Hessian medtech companies generate approximately 1.4 billion euro GVA. This is an increase of around 400 million euro, or 35 %, since 2008.

»» Every **6th** employee in the Hessian IGW works in manufacturing of medtech. ««



Employment medtech

 **+0.6%**
 **+0.6%** average annual growth



■ Employment in thousands

Around 15,000 people are employed in medtech manufacturing. The sub-sector has provided continuous, stable employment in Hesse for over 10 years.

»» **2.5%**
of all Hessian
exports are
from medtech. ««



Export medtech

 **+4.1%** average annual
growth
 **+4.7%**



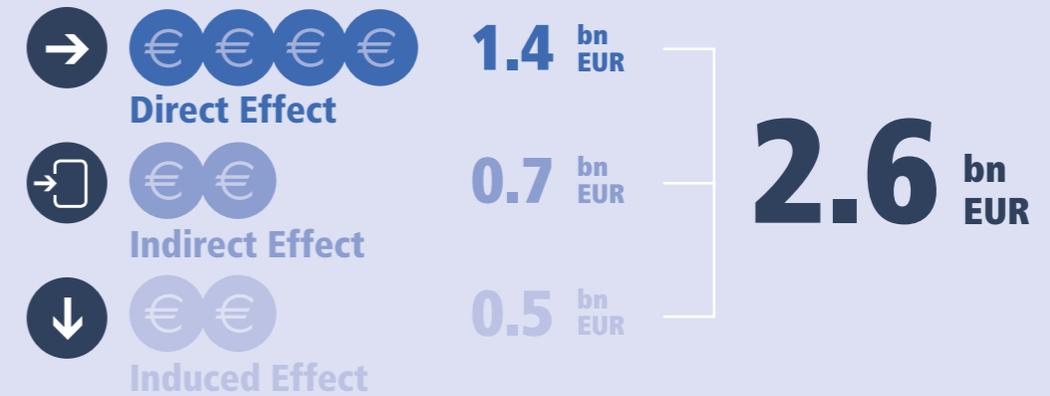
Hessian medtech exports amount to 2.8 billion euro.
This is an increase of 43% since 2008.



For each euro
of direct GVA
generated by
medtech
manufacturing,
another
0.77 EUR
is created in the
wider economy.



Gross value added medtech



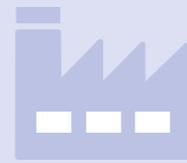
The total value added generated by medtech manufacturing in Hesse amounts to around 2.6 billion euro. Each euro of direct GVA is thus associated with another 0.77 euro in the wider economy.



Gross value added small and medium-sized enterprises (SMEs) medtech



SMEs
< 250 employees



Large enterprises
≥ 250 employees



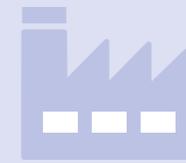
SMEs generate close to 50 percent of medtech value added.



Employment small and medium-sized enterprises (SMEs) medtech



SMEs
< 250 employees



Large enterprises
≥ 250 employees



With a workforce of 8,300 employees, SMEs are the largest employer in the medtech industry.

Deep dive

**Industrial research
and development**

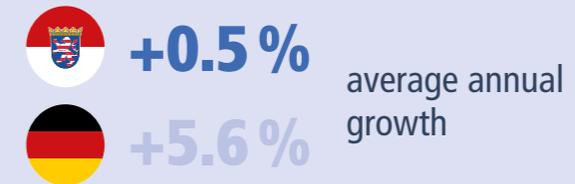




**Industrial R&D
generates
8.3 %
of the IGW's
gross value added
in Hesse.**



Gross value added industrial research and development



■ Gross value added in bn EUR

Since 2008, industrial R&D has recorded constant growth in GVA. In 2017, the sector generated direct gross value added of around 900 million euro in Hesse.

»» **5.9%**
of the IGW
workforce
in Hesse are
employed in
industrial R&D. ««



Employment industrial research and development



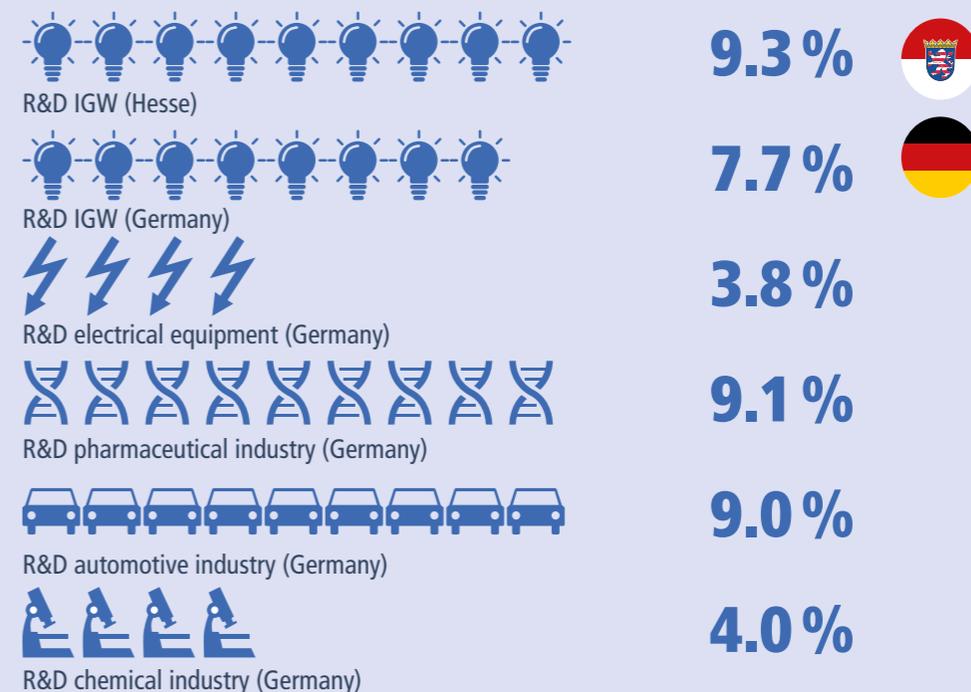
■ Employment in thousands

The industrial R&D sector is highly volatile in terms of employment. Despite occasional increases, the number of people employed has fallen by around 800 in 10 years.


At 9.3%
of gross value added,
industrial R&D
in Hesse creates
more value than
other research
intense sectors.




Gross value added share (2013)
industrial research and development
national comparison



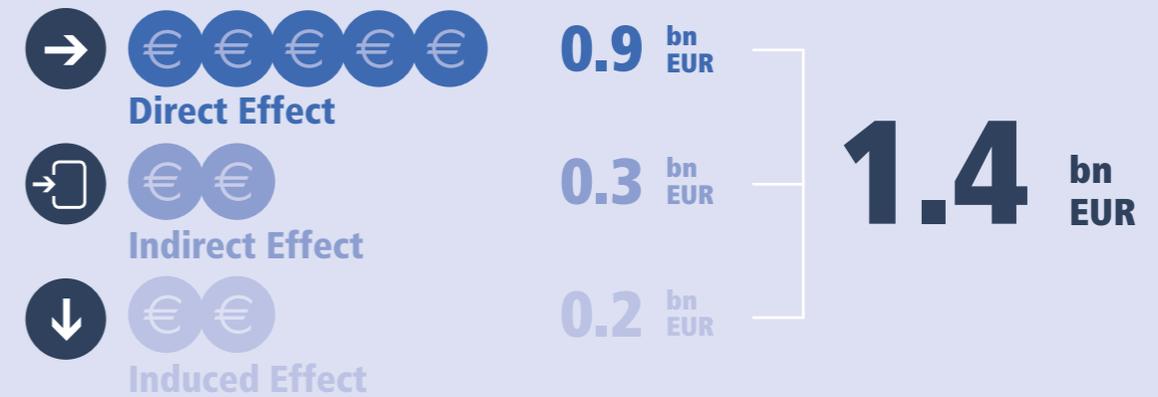
Compared to other research intense sectors in Germany, industrial R&D from Hesse creates the most value. The sub-sector's contribution to IGW gross value added in Hesse is 1.2 times higher than the national IGW average.



**Industrial R&D
in Hesse generates
500 mio EUR
incremental
gross value added
in the wider
German economy.**



Gross value added – spill-over effects industrial research and development



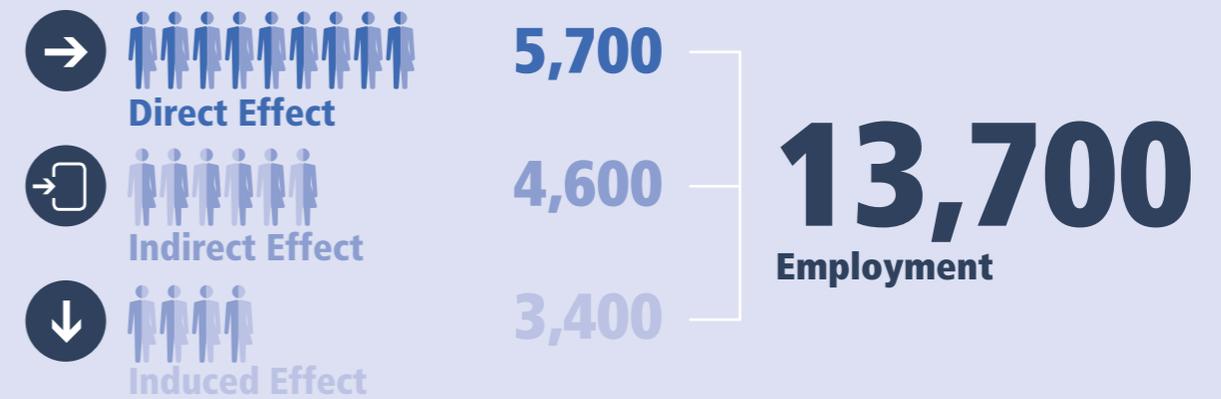
The total value added generated by industrial R&D in Hesse amounts to 1.4 billion euro. Each euro of direct GVA thus generates another 0.63 euro in the wider German economy.



**Industrial R&D
in Hesse
creates
8,000
additional jobs
in Germany.**



Employment – spill-over effects industrial research and development



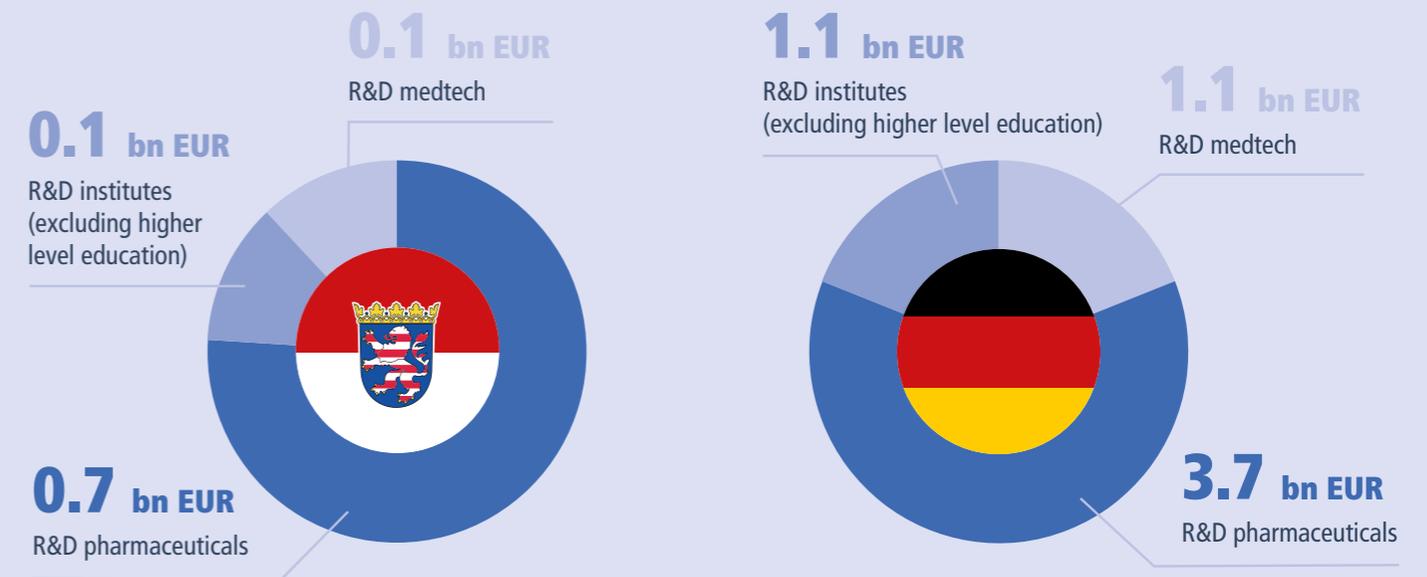
The economic activity of industrial R&D in Hesse generates an incremental 8,000 jobs in Germany. Thus, for each directly employed person, another 1.4 employment relationships are created in the wider economy.



Every
5th Euro
of gross value added
generated by
pharmaceutical R&D
in Germany is
created in Hesse.



Gross value added breakdown in Hesse and in Germany industrial research and development

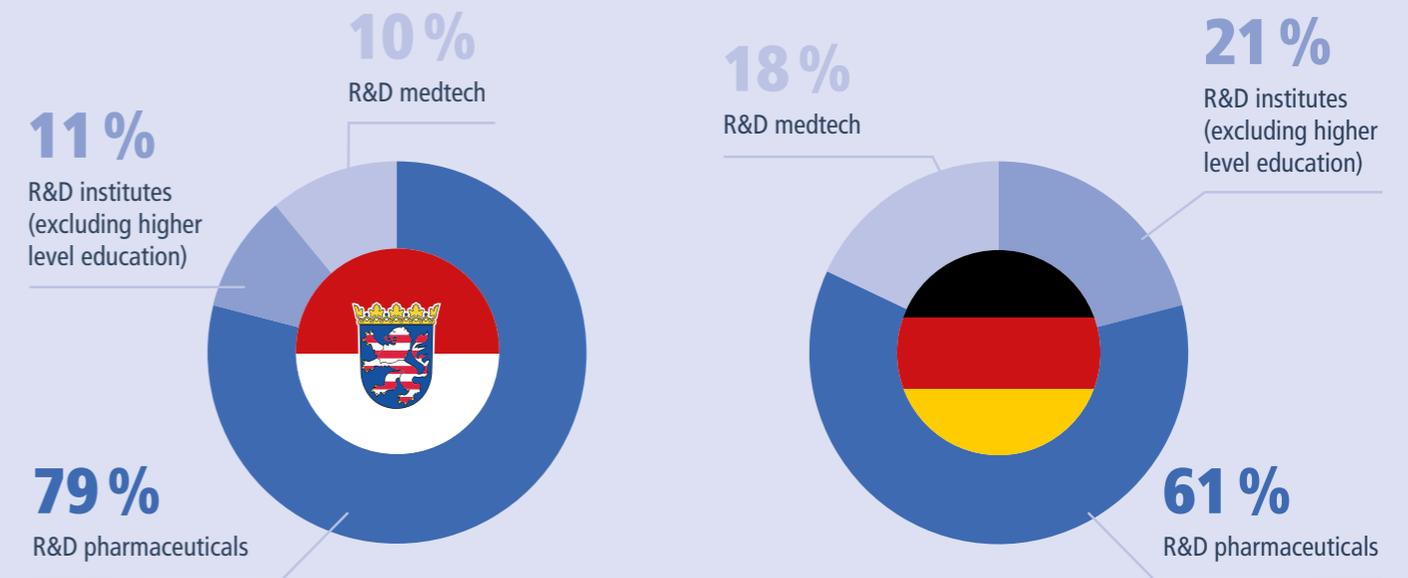


Industrial R&D in Hesse makes a significant contribution to GVA on a federal level.

»» **79%**
of the gross value
added effects
in industrial R&D
in Hesse are created
by R&D in the
pharmaceutical
sector.



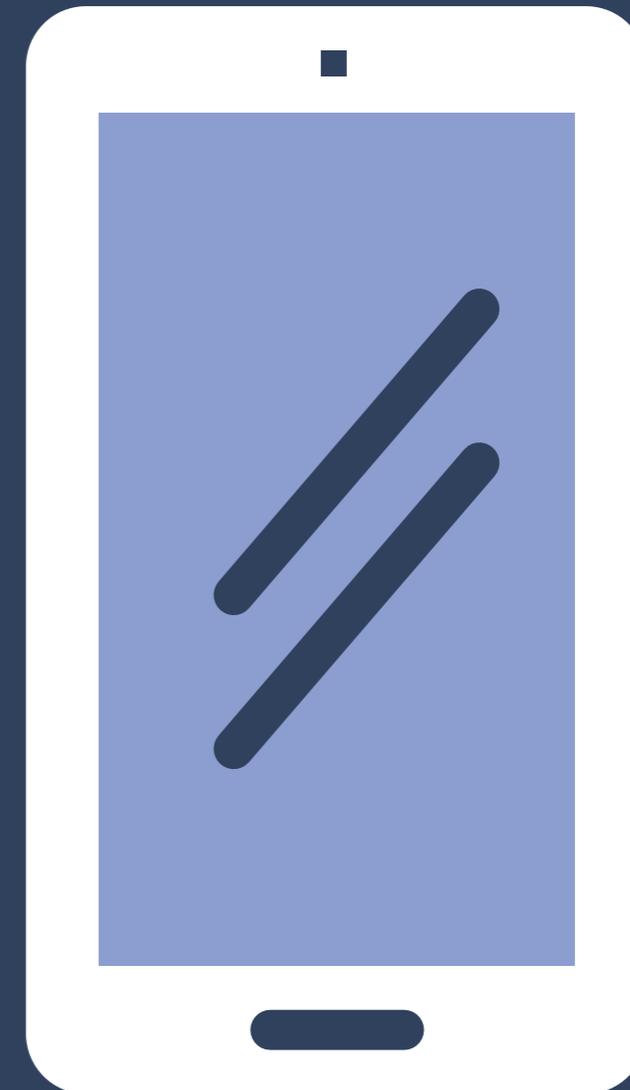
Gross value added breakdown in Hesse and in Germany industrial research and development



Pharmaceutical R&D generates 79% of GVA created by industrial R&D in Hesse.

Deep dive

E-health

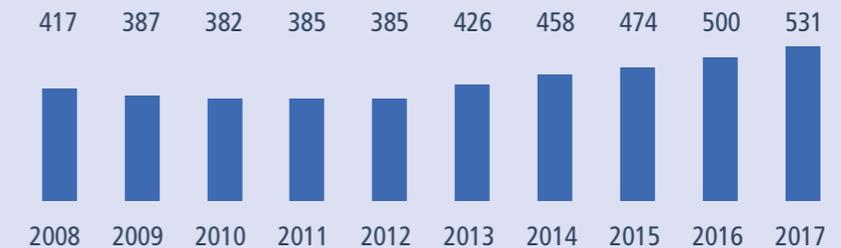
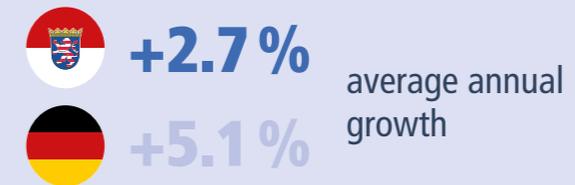




**E-health
generates
5.0%
of the IGW's
GVA in Hesse.**



Gross value added E-health



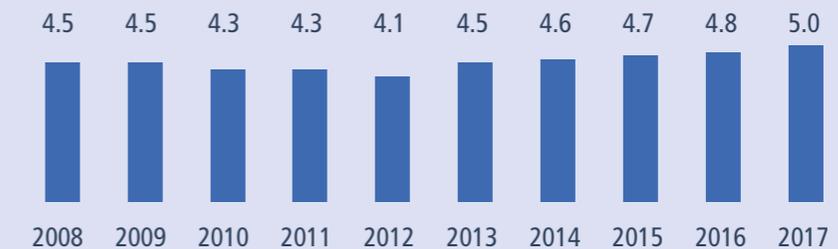
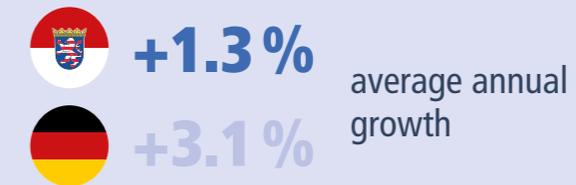
■ Gross value added in mio EUR

Currently, e-health is (still) making small contributions but has shown an increasingly positive development since 2012.

»» **5.3%**
of the IGW
workforce in Hesse
are employed
in the e-health
sector. ««



Employment E-health



■ Employment in thousands

Around 5,000 people are employed in the e-health sector in Hesse. Compared to 2008, this is an increase of around 500 employees.

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Arbeitsgruppe Gesundheitsökonomische Gesamtrechnungen der Länder (AG GGRdL)

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Others:

- Bundesagentur für Arbeit (BA): Sozialversicherungspflichtig Beschäftigte nach Wirtschaftszweigen und Betriebsgrößenklassen
- Sonderauswertungen des Statistischen Bundesamtes, des Stifterverbands Wissenschaftsstatistik und des Bundesministeriums für Bildung und Forschung; Aufteilung der FuE-Ausgaben der Bundesrepublik Deutschland

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Managed by:



Hessen Economic Development



Health Industry Initiative Hesse

Since its foundation in 2013, the Health Industry Initiative Hesse (IGH) has been a joint project of the Hessian state government, companies of the Hessian healthcare industry, the Hesse-Thuringia district of the Mining, Chemical and Energy Industrial Union (IG BCE) and representatives from science and research. The IGH is a forum in which key issues concerning the future development of the industry are discussed in an interdisciplinary manner, interlinking economic conditions, science and research, and health and social issues. Three working groups, Economy and Employment, Health and Supply, and Science and Research, aim to develop solutions to increase the attractiveness of Hesse for new investments in research, development and manufacturing. In addition, IGH aims to improve the supply of high-quality drugs and medical products to the population, secure jobs and highly qualified new employment.

Technologieland Hessen

Under the brand "Technologieland Hessen", Hessen Trade & Invest connects, advises and informs future-oriented companies throughout the state of Hesse. Technologieland Hessen supports the development, application and marketing of key technologies on behalf of the Ministry of Economics, Energy, Transport and Housing in a holistic, unbiased, openminded and complimentary manner. In order to keep pace with current technological and social developments, it is important to focus both on individual technologies and to identify synergies between technologies. The Technologieland Hessen experts strive to advance technologies and thereby strengthen the position of Hessian companies, today and in the future. The Life Sciences & Bioeconomy team supports the medtech, diagnostics and pharmaceutical industries in the development of biotechnological innovations and paves the way for the transformation of the economy into a biobased economy.

WifOR

WifOR is an independent economic research institute that was founded in 2009 as a spin-off from the Department of Financial and Economic Policy at the Technical University of Darmstadt, Germany. The institute provides associations, companies, government organizations, and NGOs with insightful and objective data analytics and outcomes research that guide decision-making. Research topics include digitalization, education, health, innovation and R&D, labor markets, social policy, sports science, sustainability and global value chains. With locations in Germany, Greece, Ireland and the USA, a team of 50 economists, analysts and consultants draw from the experience of 300+ projects in over 20 countries.

Overview of key economic figures



€
gross value added
10.5 bn EUR
direct gross value added

person icon
employment
95,700
direct employment

truck icon
export
12.5 bn EUR
of exports

€ € €
gross value added
18.5 bn EUR



person icons
employment
202,700

person icon
pharmaceuticals
34.3 %
of gross value added in the IGW

stethoscope icon
medical technology
15.6 %
of employment in the IGW

lightbulb icon
industrial research and development
8.3 %
of gross value added in the IGW

phone icon
E-health
1.3 %
annual employment growth rate since 2008

€
create
38 %
of gross value added in the IGW



person icon
employ
62 %
of persons employed in the IGW

Glossary



Gross value added The gross value added shows the value actually created by an economic player or a sector. The sum of gross value added of all economic actors in Germany corresponds to the gross domestic product (GDP), taking into account taxes and subsidies on goods. Gross value added is thus the key indicator for quantifying the economic contribution of a player or industry to the economic output of a region such as Germany or the State of Hesse.



Employed persons Employed persons are all persons who, as employees (manual workers, white-collar workers, civil servants, marginally employed persons, soldiers) or as self-employed persons or as family members assisting them, carry out an activity aimed at economic gain, regardless of the scope of that activity. Persons with more than one simultaneous employment relationship are recorded only once with their main activity.



Export The exports of the Industrial Health Economy comprise the areas of pharmaceuticals and medical technology. The essential data basis for the assessment of exports is the foreign trade statistics of the Federal Statistical Office according to the goods classification. Specifically, both pharmaceutical raw materials and products as well as medical devices and orthopaedic appliances in the sense of the food industry and industrial economy (ELW) are relevant.



Total effects The total effect (gross value added/number of persons employed) describes the sum of the direct effect of a company's business activity on economic production and jobs in the national economy (direct effects), the effects that result indirectly from the purchase of intermediate inputs from the economy as a whole (indirect effects) and the effects that result from the re-expenditure of wages and salaries (induced effects).



Direct effects The direct effect describes the immediate impact of a company on the national economy. They can refer to the contribution of an enterprise to the total economic production value, to the gross value added or also to the number of employed persons.



Indirect effects The indirect effect measures the economic value that is created in the overall economy by the purchase of intermediate inputs from the industry players (e.g. number of employees working in the intermediate input companies of the industrial health economy). The indirect effect is also a measure of the degree of interdependence of the industry with individual players or sub-sectors of the overall economy.



Induced effects The induced effect quantifies the contribution resulting from the re-expenditure of wages and salaries (e.g. the number of employees in the economy as a whole who produce consumer goods for employees in the health economy and their suppliers).



Value-added focus areas In the industrial sectors of the economy, production as well as distribution and wholesale of manufactured products are a central factor. The industrial health economy is thus defined as the manufacturing of health-related goods and also the distribution and wholesale of these products. Accordingly, manufacturing includes the following product groups: pharmaceuticals, medtech, hygiene products, sports and fitness equipment, industrial research and development and ICT/DV equipment. Distribution and wholesale includes: wholesale of pharmaceuticals/medtech, trade with hygiene products and ICT/DV services.



Small and medium-sized enterprises All companies that employ between 1 and 249 employees.



Large enterprises Large enterprises include all enterprises with 250 or more employees.



Pharmaceuticals In this study, the term pharmaceuticals is used to refer to the production of pharmaceutical products with a health reference. Other pharmaceutical products such as veterinary medicine products are not included here because they do not have a direct relation to health. For a better understanding, medicinal products for human use and pharmaceuticals or pharmaceutical industry are used synonymously in this study. Trade and distribution activities with medicinal products for human use are recorded under wholesale services with medicinal products for human use according to the IGW definition.



Medical technology, in short medtech refers to the manufacturing of medical products and technology. This includes, for example, the production of bandages/plasters, syringes and hearing aids as well as the production of X-ray machines, computed tomography (CT) or infusion systems.



Industrial research and development Industrial research and development (R&D) takes into account only those R&D activities and investments that are carried out by participants in the IGW. According to the definition of the product groups in the GGR, this includes the sub-areas of research and development on medical products and technology, human pharmaceuticals as well as (health related) research and development outside universities. R&D activities in health care institutions and at universities, on the other hand, are not included in industrial research and development.



Research and development intensity The research and development intensity of a company, a sector or an industry describes the ratio of expenditure on research and development to the gross value added created.



E-health In the context of this study, e-health covers all health related information technology and data processing devices and services. This includes, for example, telemedical devices and the sale of health-related cloud services for the application area. Digital medical technology is not considered e-health in this sense, but is included in the medical technology goods group.



Germany



Hesse

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