



Elderly Care Homes in Germany



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The German elderly care home market contains 9.921 homes that size of around €14bn

Context

The care home market in Germany is a rapidly growing industry, driven by an **aging population** and **increasing demand for long-term care services**. According to a report by the German Federal Statistical Office, the number of people over the age of 65 in Germany is projected to increase by more than 50% by 2060. This considers **care homes, residential homes and nursing homes**.

There are **9.921 care homes** in Germany, totaling a **market size of around €14bn**. This market is composed of both **publicly and privately operated facilities**. Privately operated care homes are owned and operated by private companies or individuals, and typically charge higher fees.

The quality of care in German care homes varies widely. The German government has implemented strict regulations and oversight to ensure that all care homes meet certain quality standards. The **Federal Care Act**, for example, sets standards for staffing levels, training, and facilities.

Despite the demand for care homes in Germany, the industry faces several **challenges**. One of the main challenges is the **shortage of qualified staff**, which has led to increased wages and high turnover rates. Additionally, the **cost of care home services has been rising**, making it difficult for some older adults to afford the care they need.

Geographical coverage



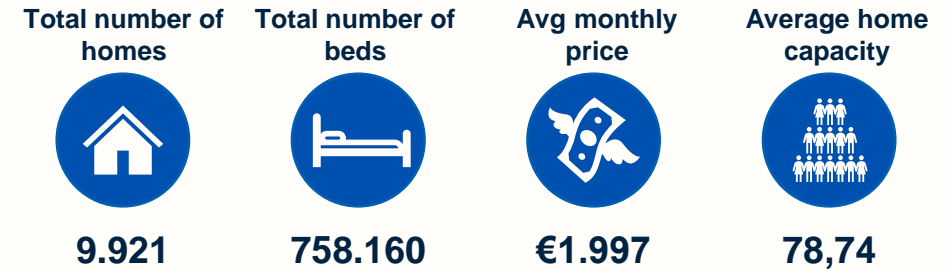
Statistics Germany

There are **9.921** elderly care homes that account for **758.160** beds in Germany

Number of homes per region



Aggregated country statistics



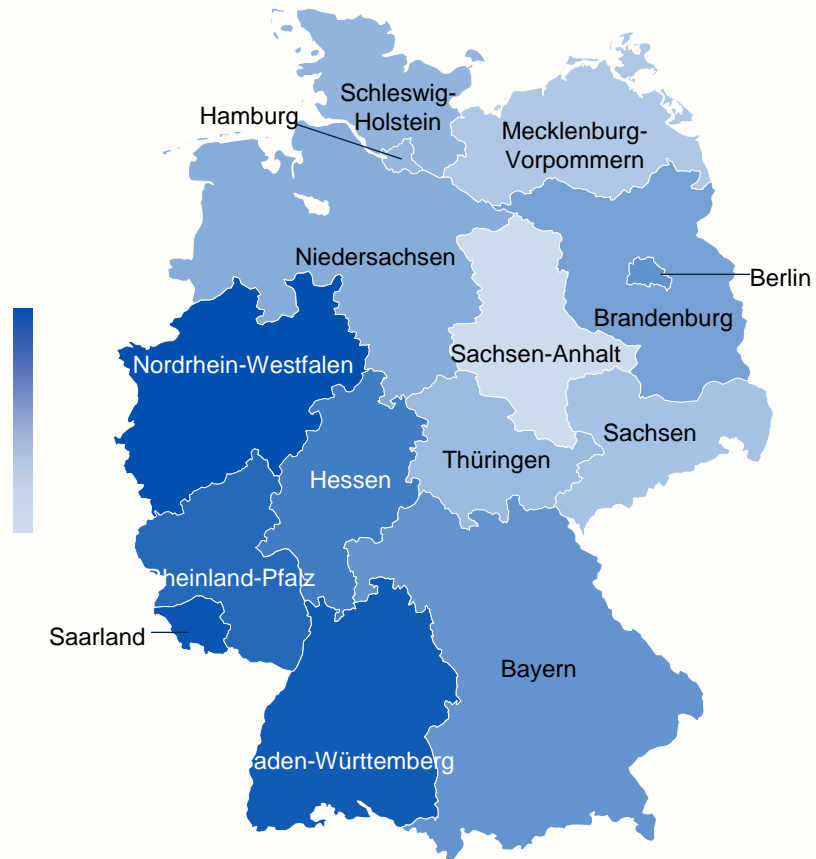
Per company insights included in the database

- Name
- Address
- Region
- Part of group
- Phone
- Mail address
- Website
- Lowest monthly fee

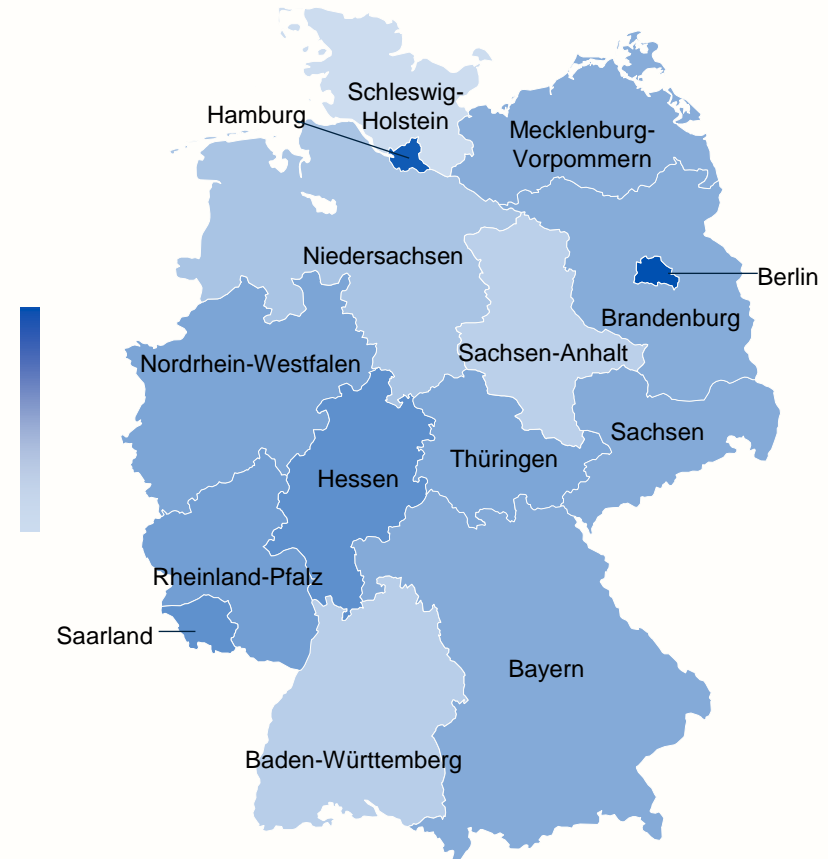
Germany Regional Statistics

The most expensive homes are in North-East Germany, the largest in the big cities

Average monthly price per region



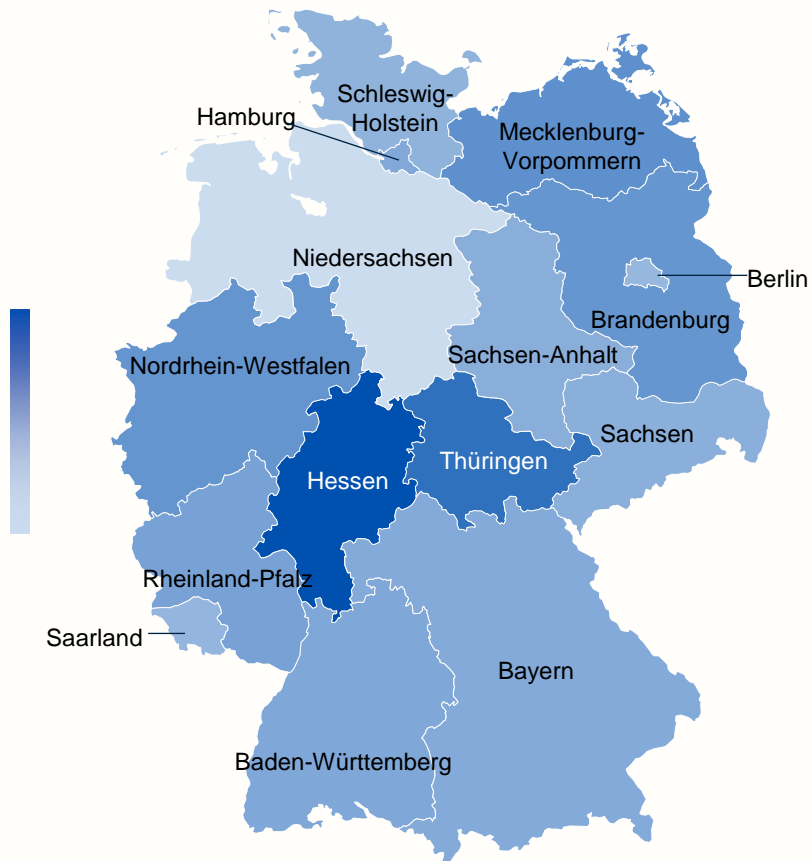
Average care home capacity per region



Germany Regional Statistics

Hessen is the least saturated market, while Niedersachsen holds the largest size

65+ Inhabitants per Number of Beds by region



Yearly Market Size* by Region



Note: The dataset contains data as of 05/01/22

*Market size = total capacity * avg price/year * avg occupancy rate

Korian is the leading operator in the German Elderly Care Home Market

There are 493 groups active in Germany that operate 4.257 homes

Market Definition and Segmentation

- Market : **Germany**
- **Elderly Care Homes**
- Market Segmentation
 - **Independent**: only **1 home**
 - **Small**: between **2 – 10 homes**
 - **Medium**: between **11 – 50 homes**
 - **Large**: above **50 homes**

2022 Database*

Category	Number Groups	Total Number of Homes	Avg Nbr of Homes
Large	7	753	108
Medium	85	1.601	19
Small	401	1.903	4,75
Total Group	493	4.257	8,63
Independent	5.745	5.745	1
Total	6238	9.992	1,6

Top 10 Groups	# of homes
Korian	217
Alloheim	160
Kursana	94
Pro Seniore	85
Evangelische Heimstiftung	74
	72
	51
	44
	40
	38

Descriptive statistics of the German care home market dataset

The dataset offers information on 9 different parameters for 9.921 care homes

DESCRIPTION & COUNT OF ALL PARAMETERS		
Parameter	Description	Count
Name	The name of the elderly care home.	9.921 (100%)
Group	This column shows if the individual care home is part of a group that operates multiple care homes. If the cell is blank, the group is either unknown or the care home is independent.	4.276 (43,10%)
Address	The address that the care home is located, displaying the street and number.	9.921 (100%)
Postal Code	Postal code of the city in which the elderly care home operates.	9.921 (100%)
City	City in which the care home's address is located.	9.921 (100%)
Region	Region that the elderly care home is active in. In Germany there are 1 regions in total, encompassing Baden-Württemberg, Bavaria, Berlin, Brandenburg, Hamburg, Hesse, Lower Saxony, Mecklenburg - Vorpommern, North Rhine-Westphalia, Rhineland-Palatinate, Saarland, Saxony, Saxony-Anhalt, Schleswig-Holstein and Thuringia.	9.921 (100%)
Capacity	In this column the capacity of each individual care home can be found. This value is expressed in the number of beds that the home has available.	9.584 (96,60%)
Website	The website of the care home, on which you can find more detailed information on each individual care home.	9.123 (91,96%)
Monthly Fee	The starting monthly fee of the elderly care home.	8.290 (83,56%)