

Websession

GERMANY'S IVD AND ANALYTICS MARKET

VIRTUAL.MEDICA, 18.11.20

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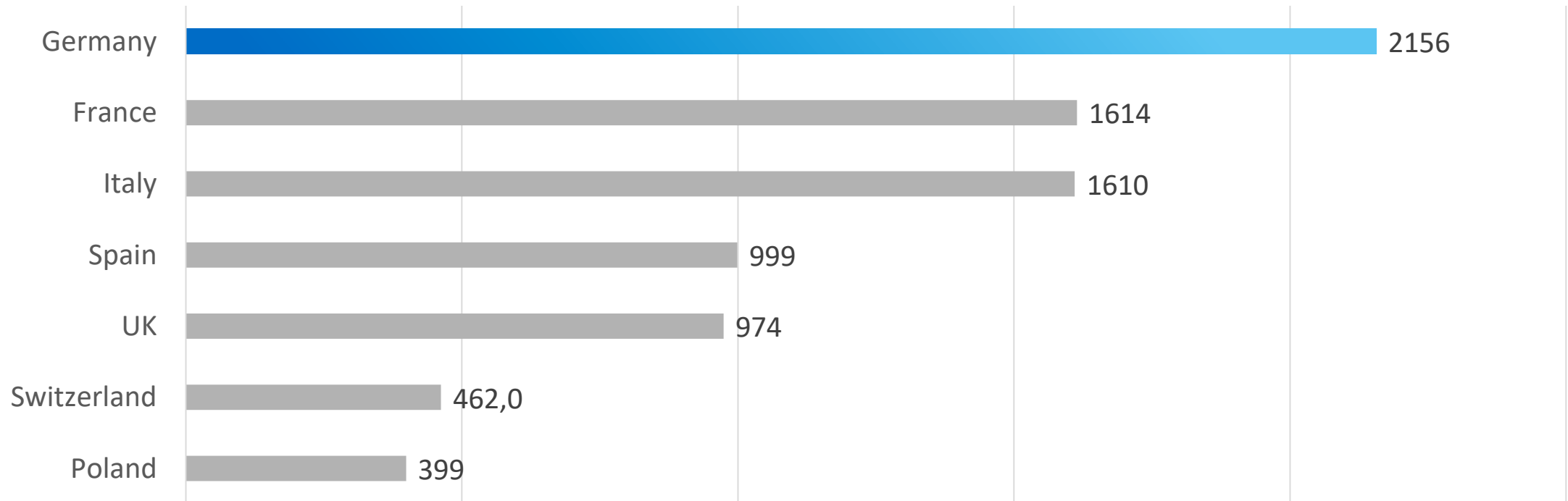


DIAGNOSTICS

IVD markets in Europe

The EU accounts for about a quarter of the global IVD market

IVD market sizes of selected European countries, 2019 [EUR mn]



The diagnostics and life science research industry in Germany

Key figures 2019

24700

Diagnostics Industry Staff

15800

Life Science Research Industry
Staff

4.5 bn

Market size (€, Diagnostics + Life
Science research)

90%

of companies are SMEs

13%

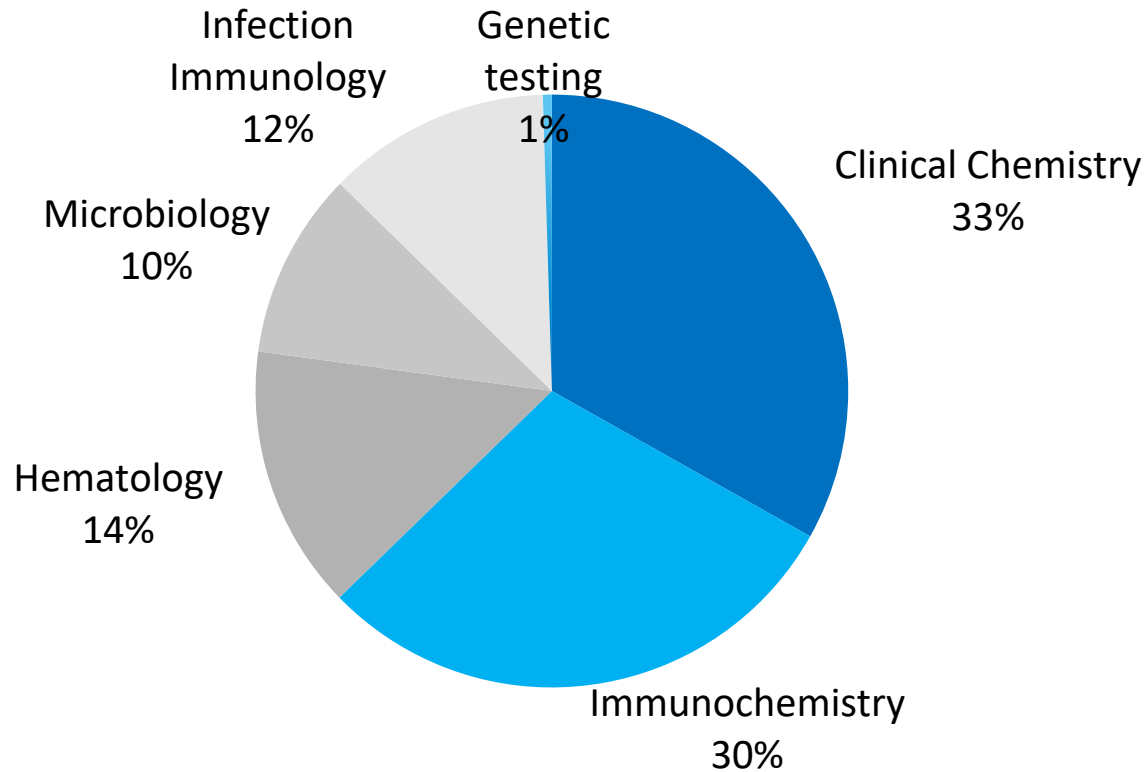
of revenues invested in R&D

45%

Of companies plan to expand R&D
in Germany

Market segments

Clinical Chemistry and Immunochemistry account for more than half of the market



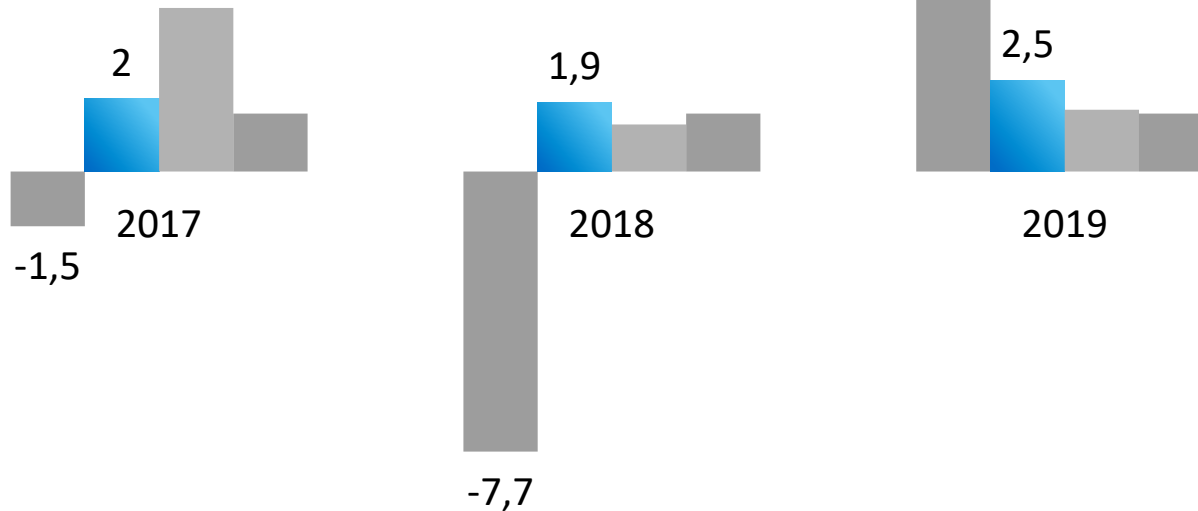
**Overall market size:
€2.16 bn (2019)**

**Over 85% of the market
is attributed to reagents,
the rest to hardware (e.g.
devices) and services.**

Top growth fields

Segment growth rates in %

■ Inst./Cons. ■ Infect. Immun. ■ Microbiology Reag. ■ Immunochem.



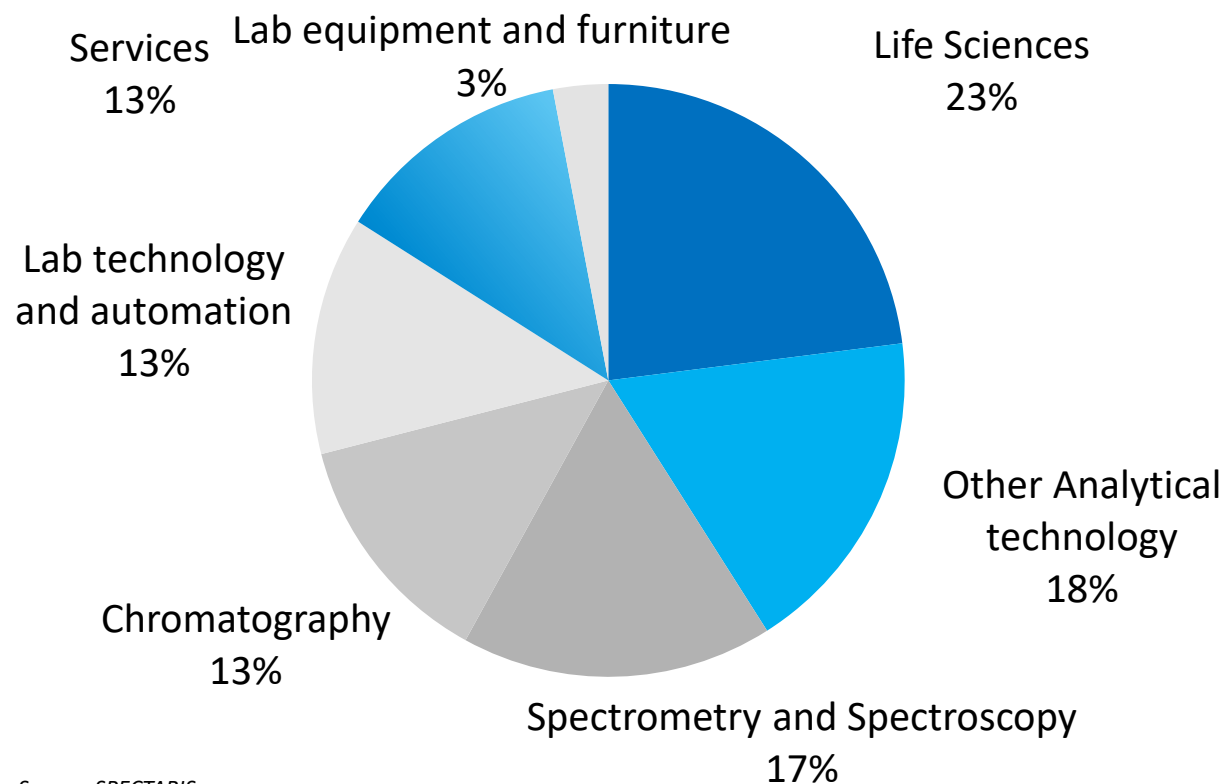
After some challenging years, the market for laboratory instruments and consumable started growing again - strongly



ANALYTICS

Analytics Segments

Life sciences is the largest segment of the global analytics market



Source: SPECTARIS

Key facts on Germany:

- Europe accounts for 24% of the world's analytics market
- Germany is Europe's largest analytics market
- Top growth segments: Services, Raman Spectroscopy and Life Sciences

Analytical, Bio and Lab technology in Germany



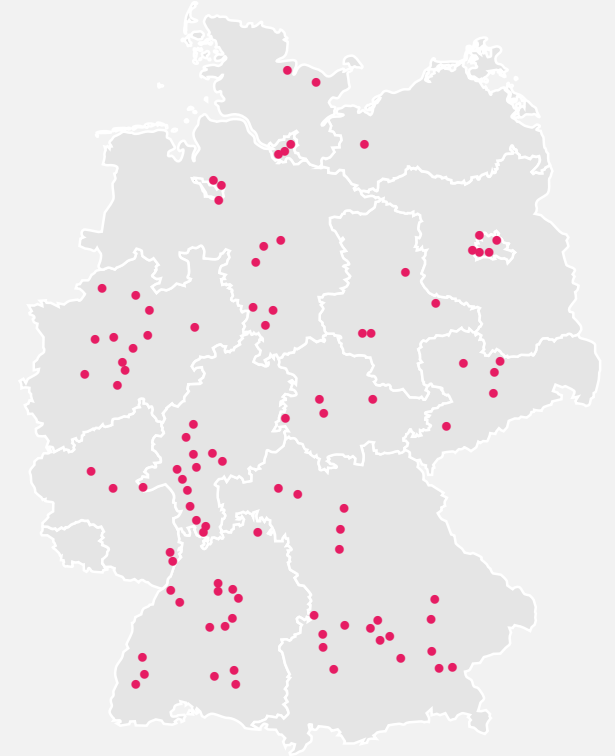
≈ 330 companies



48k employees

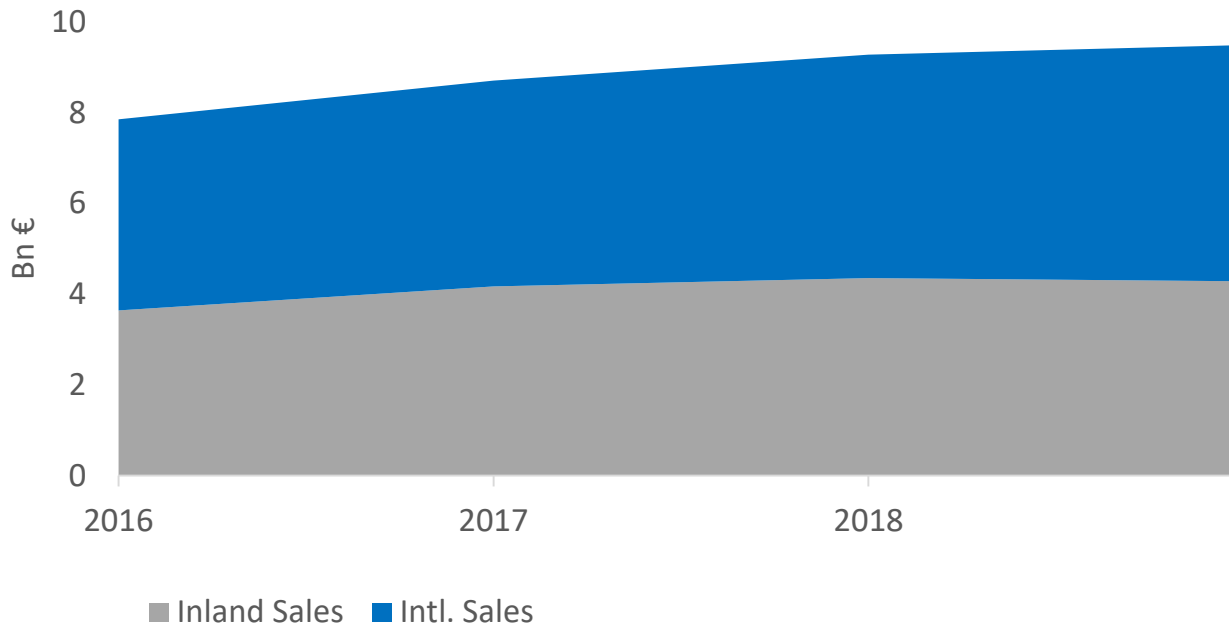


**Most companies in
Baden-Württemberg,
Hessia and Berlin**



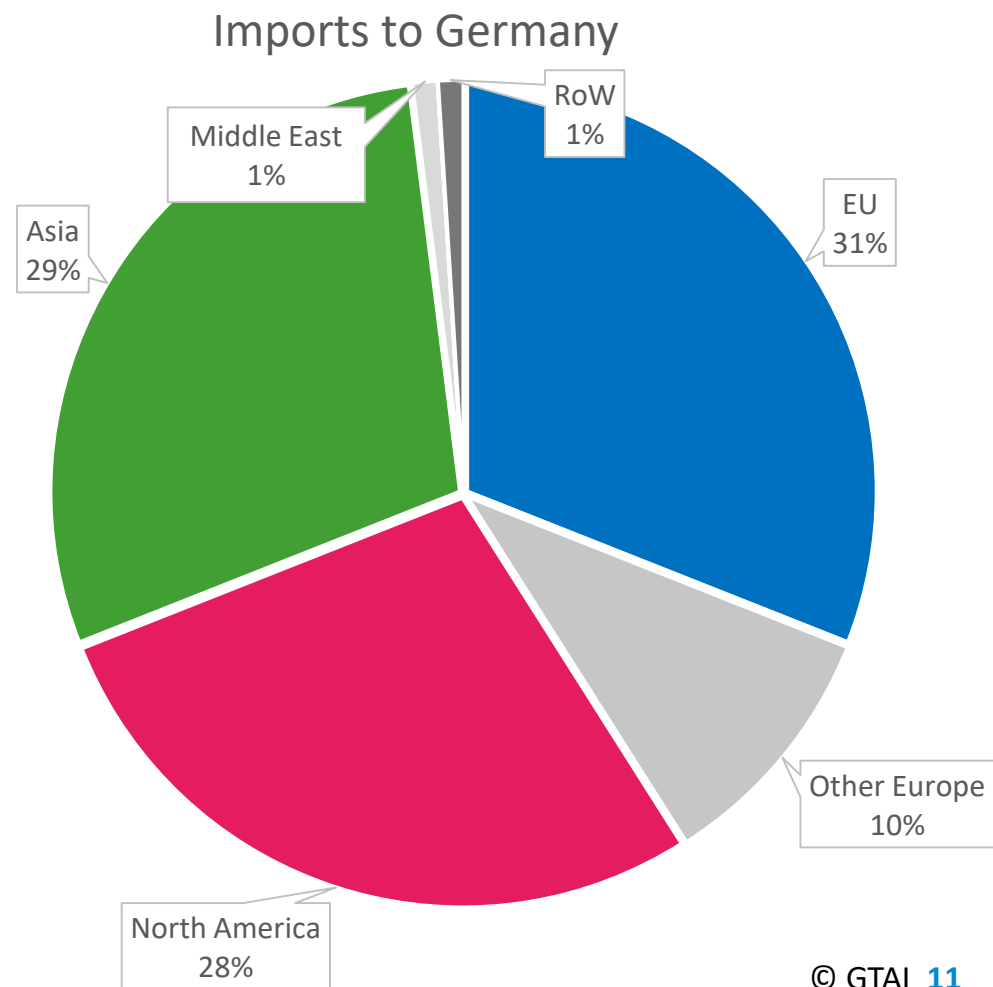
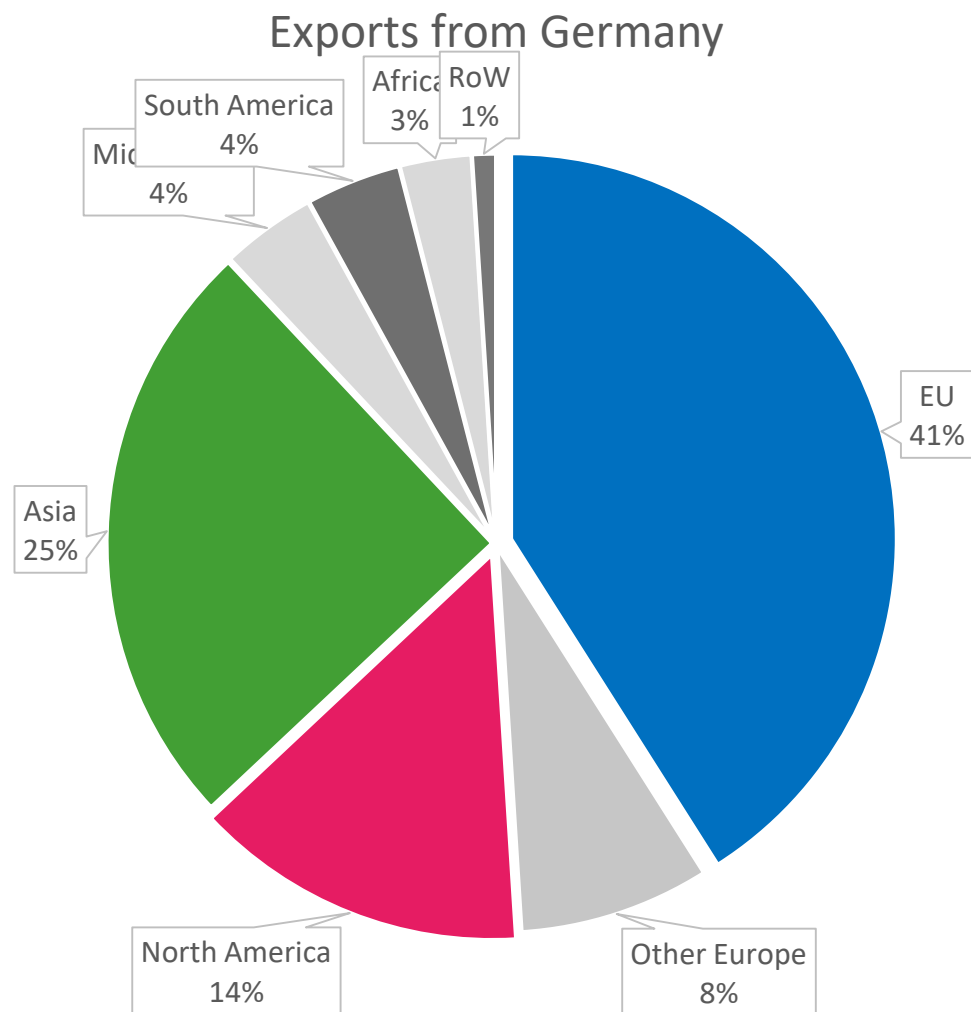
Manufacturer Headquarter Locations

Analytical, Bio and Lab technology in Germany



The 2.3% market growth in 2019 was mainly created by a rise in exports.

Analytical, Bio and Lab technology: International trade



Source: Spectaris 2019 trend report

Lab business

Almost two thirds of laboratories in Germany report business as usual

13% are even busier than before the outbreak

Optimistic outlook

According to a survey in October, Covid-19 hit the industry less than expected in summer

Positive development due to infection-specific products

Diagnostics 2020



Dr. Moritz Beissenhirtz

Manager Business Development
Thermo Fisher Scientific



Gregor Kemper

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Our advisory services include:

- Market-entry strategy development support
- Tax and legal information and support
- Funding and financing options advice
- Location identification, location visit support

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