

MEDICA 2022

# MARKET UPDATE GERMANY: DIAGNOSTICS AND ANALYTICS

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# The Diagnostics and Analytics Industry in Germany

## Agenda

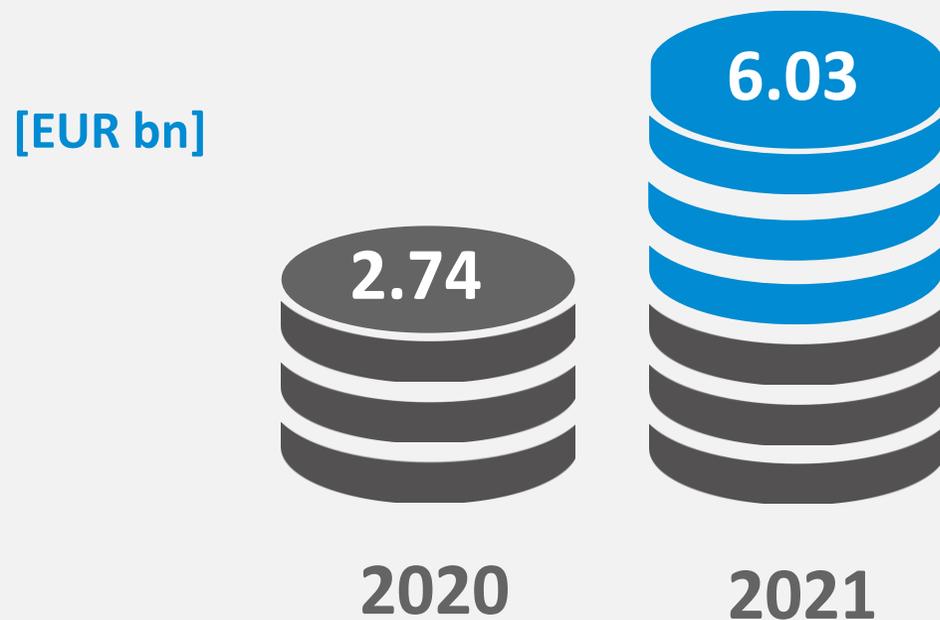
1. **Diagnostics: market data and statistics**
2. Analytics: market data and statistics
3. Current trends and developments



# 1. DIAGNOSTICS

MARKET DATA AND STATISTICS

# Diagnosics sales in Germany experienced an unprecedented growth of 120% in 2021

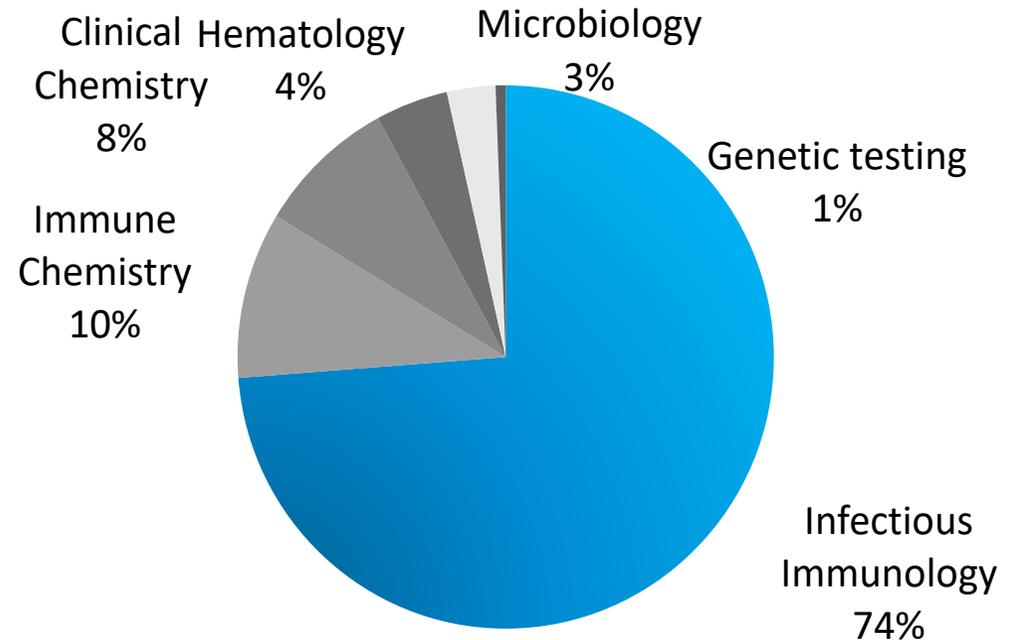


This growth was primarily due to increased reagent sales; the market for devices and services decreased in size

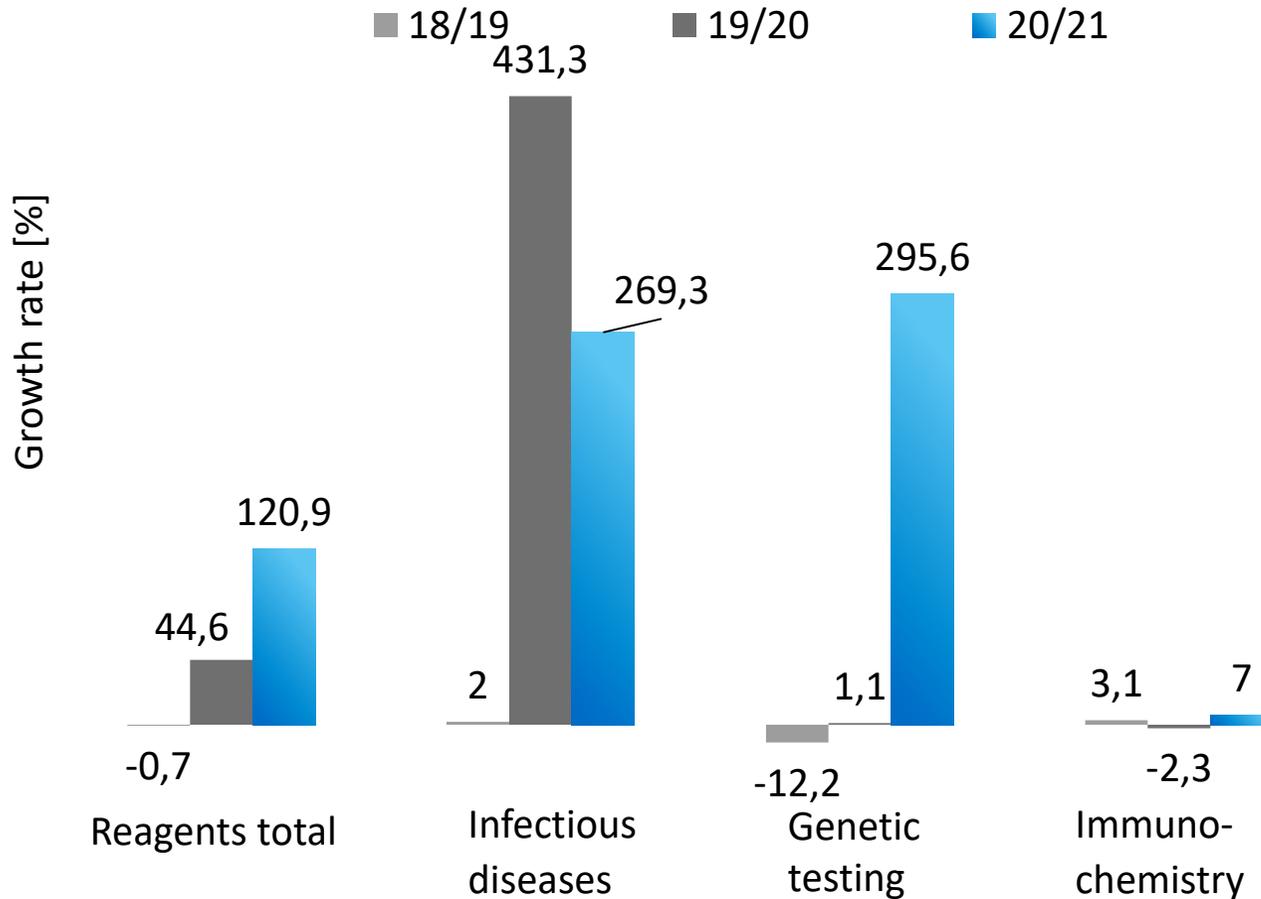
# The explosive growth in 2021 was mainly carried by infectious disease diagnostics

Reagents accounted for 95% of the German IVD market in 2021.

Reagent market segments:



# Genetic testing is a small segment, but the fastest growing one



The total IVD market *without* COVID-19 testing grew by 1,2% in 2021.



## 2. ANALYTICS AND RESEARCH

MARKET DATA AND STATISTICS

# A return to regular, steady growth is expected for the analytical, biological and lab technology industry

## 2021

-  Revenue: +12.5% [EUR 10.88 bn]
-  Export: +12.9% [EUR 6.05 bn]
-  Staff: +3.7%

## 2022 (estimates)

-  Revenue: +6.9%
-  Export: +7,6%
-  Staff: +5,2%

# Although most exports from Germany go to EU countries, China is the #1 destination

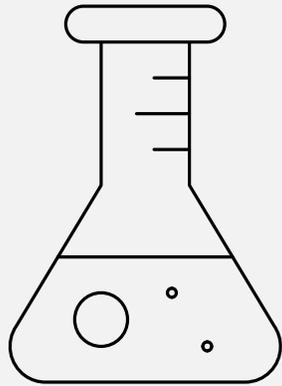


**50%**

**of Analytics, bio and lab technology companies in Germany have plans to expand to China**

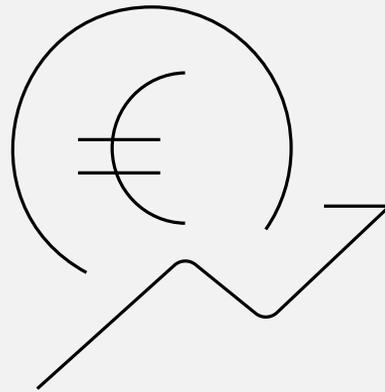
The top countries of origin for imports to Germany in this industry field are the USA and Japan.

# The market for products used in Life Science research exhibited solid growth last year



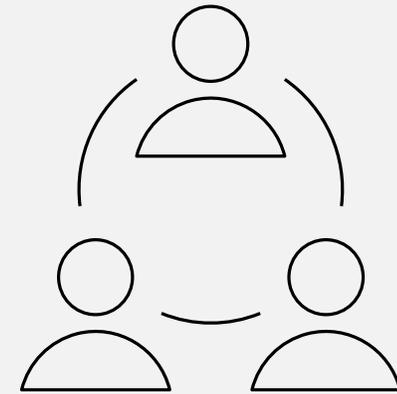
Revenue

**€ 3.17 bn**



Growth 2020/2021

**9.7%**



Employees

**20,000**



## 3. CURRENT TRENDS

AND DEVELOPMENTS

# Germany ended its free antigen program in June 2022

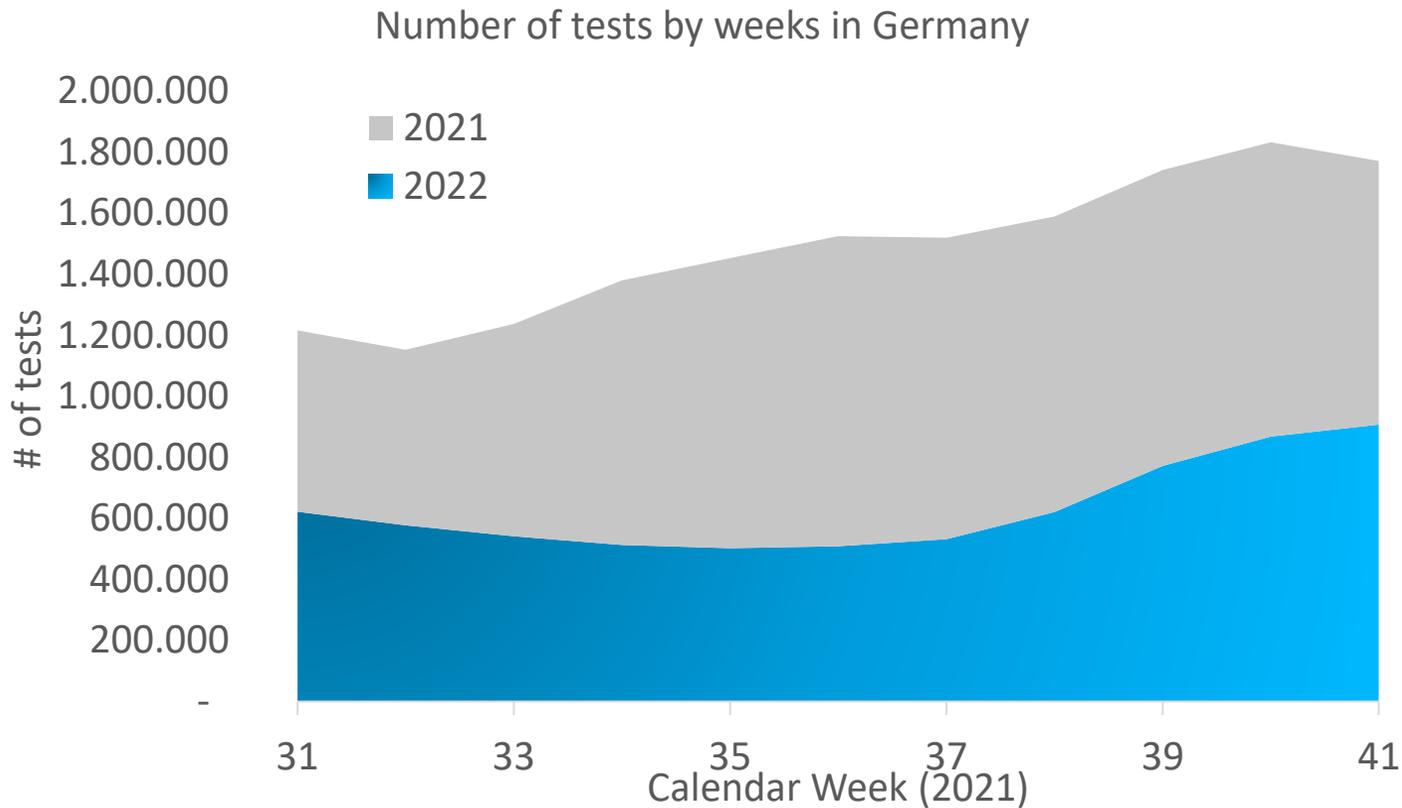
Free antigen tests for vulnerable groups and in healthcare facilities →

3€ antigen tests for people with high infection risk →

Out-of-pocket for everyone else →

Since COVID-19 testing was critical for revenue growth in the past years, how is the end of free testing going to impact the market?

# Despite the end of free antigen tests, the number of tests only decreased by a bit more than half



Many of the COVID-19 diagnostics approved in the EU are supplied by international companies.



## IVDR: What's new

- Harmonized EU IVD market, entered into force in May
- Modification from 2021 extended deadline for some products up until 2027, depending on risk class
- Only dates were changed, other obligations apply immediately

## Digital lab

Development of an international OPC-standard to enable interoperability between lab equipment. The standard is scheduled to be finalized next year.

## Servitization

Among companies in Germany, services are an increasingly important addition to their analytics, biotech and lab technology products. Over two thirds of companies generate at least 10% of their revenue with services.

## Our services for international clients

- Information about growth markets in Germany
- Legal information
- Tax information
- Incentives and financing information
- Introduction to local partners
- Site selection support





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