

The German Industry for AnalBtical, Bio and Laboratory Technology (= „ABL“): Economical Outlook 2020

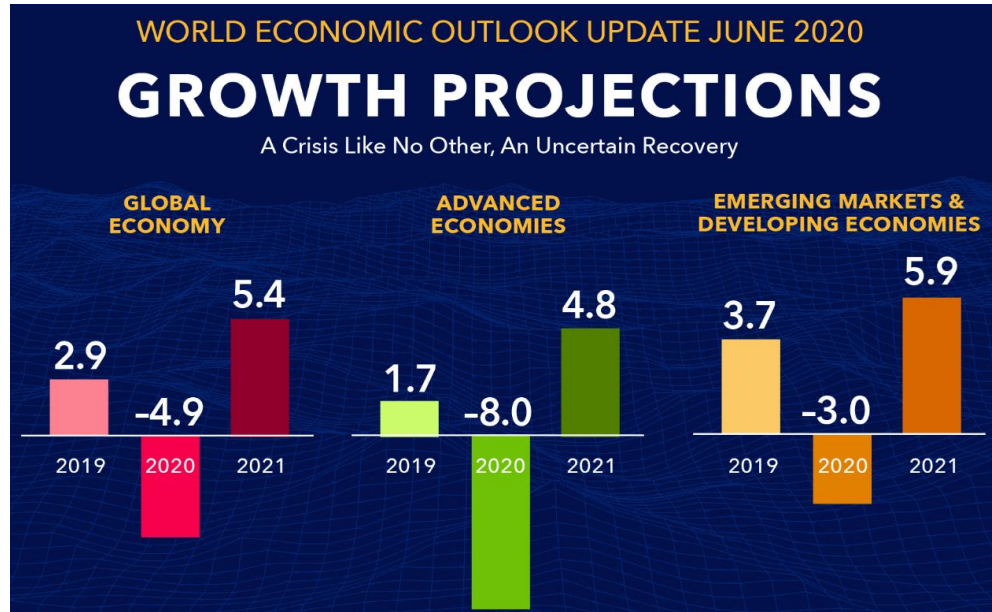
Mathis Kuchejda, Chairman of Analytical, Bio and Laboratory Technology Division at SPECTARIS,
CEO Schmidt & Haensch GmbH & Co. KG

Press Conference analytica virtual, 12.10.2020

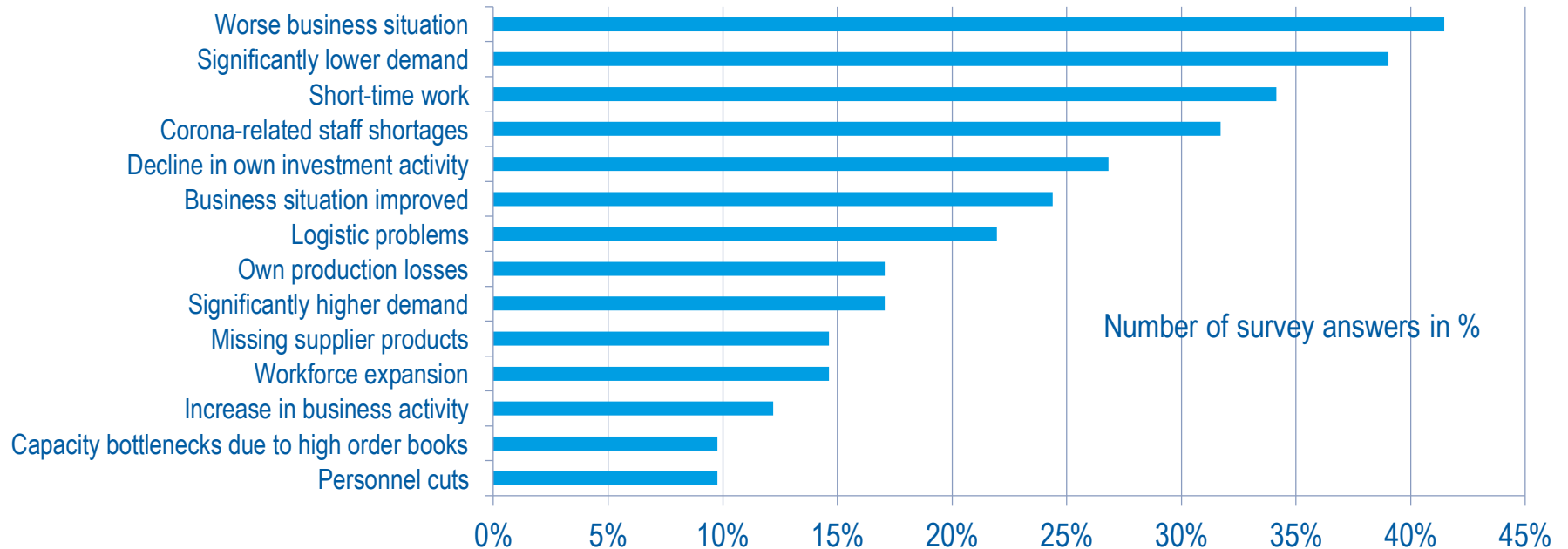
Agenda

- Global economic environment
- The German ABL industry
 - Economic impact of COVID
 - Foreign trade first half of 2020
 - Outlook year 2020

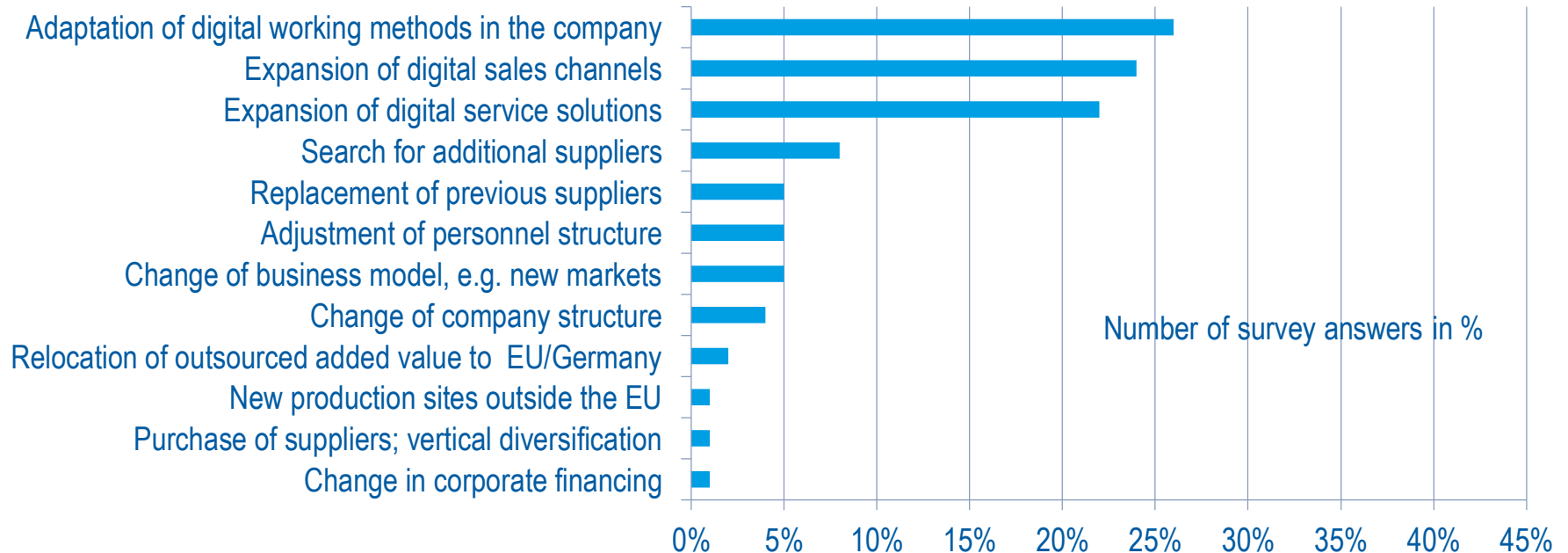
Declining global economy growth in 2020, recovery expected in 2021, uncertainty remains high



41% of companies report worse business situation



“Will the corona crisis permanently change your company, business model or value chains?”



Strong demand for consumables and applications around COVID



Products or customer segments with higher demand:

- Consumables, e.g. pipettes
- Personal protective equipment (PPE)
- Sterilizers
- Virus diagnostics, PCR/qPCR devices, Test kits
- Cell Analytic
- Research areas that deal with Corona
- Pharmaceutical research
- Bioreactors and peripherals

Weaker demand from the chemical industry (incl. oil, gas, petro)

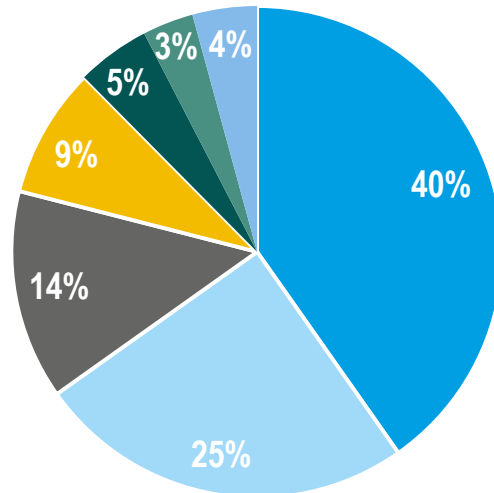


Products or customer segments with weaker demand:

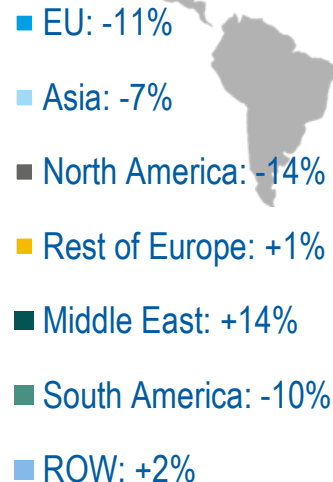
- Chemical industry, oil and gas industry, petrochemical industry
- Large equipment purchases/capital goods
- Mobility, automotive, transport
- New business areas, e.g. 3D bio printing

Exports decrease by 8% in the 1st half of 2020

Share of target regions in total exports
1st half of 2020



Change in absolute export values
1st half of 2020 vs. 2019



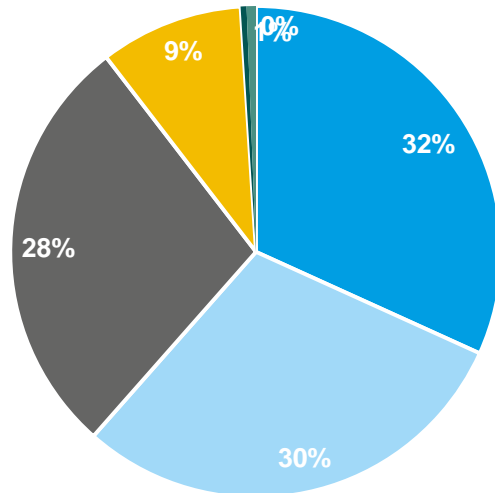
**Total German export ABL
1st half of 2020: -7,9%**

Export: Top 10 destination countries

	Country	1st half of 2020 vs. 2019
1	USA	-13,9%
2	China	-7,5%
3	France	-20,4%
4	Italy	-13,7%
5	The Netherlands	+5,9%
6	UK	-18,5%
7	Spain	-12,2%
8	Switzerland	+11,8%
9	Poland	+1,8%
10	Japan	-17,4%

Imports are stagnating

Share of target regions in total imports
1st half of 2020



Change in absolute imports values
1st half of 2020 vs. 2019

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- North America: 9%
 - Asia: -5%
 - EU: -2%
 - Rest of Europe: 1%
 - Middle East: -8%
 - ROW: -19%

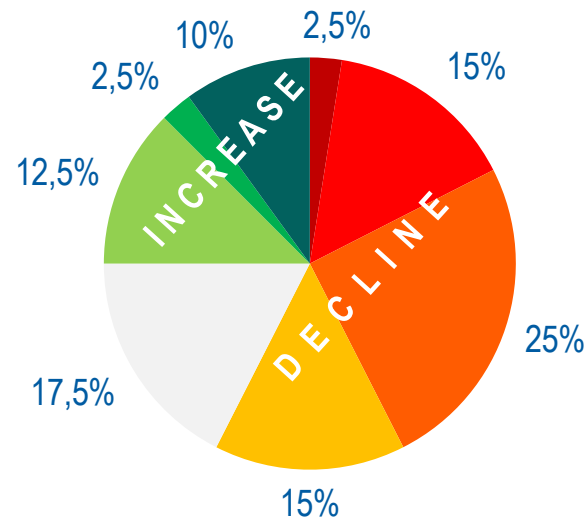
**Total German import ABL
1st half of 2020: +0,3%**

Import: Top 10 countries of origin

	Country	1st half of 2020 vs 2019
1	USA	+9,1%
2	Japan	-14,8%
3	Switzerland	+1,3%
4	UK	-0,4%
5	China	+5,9%
6	The Netherlands	+0,1%
7	Singapore	-5,8%
8	France	-8,9%
9	Ireland	-20,0%
10	Poland	-14,0%

Declining incoming orders Jan-Sep 2020

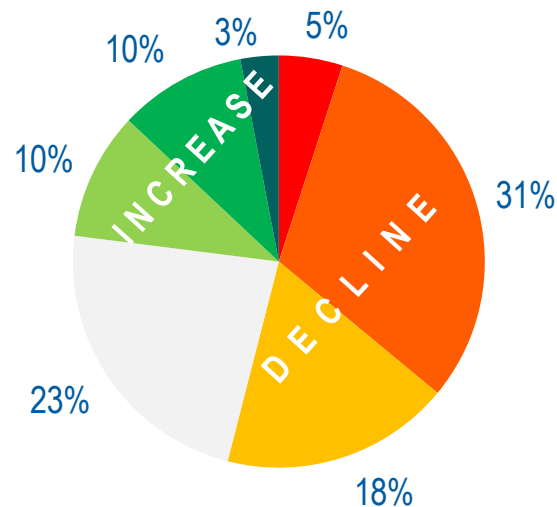
- **Orders received Jan-Sep 2020 vs. Jan-Sep 2019: -4,4%**
(in terms of value, weighted average)
- **Order situation of survey participants in detail:**



- decline in orders -50% to -75%
- decline in orders -25% to -50%
- decline in orders -10% to -25%
- decline in orders -1% to -10%
- stagnation +/-0%
- order increase +1% to +10%
- order increase +10% to +25%
- order increase +25% to +50%

Negative full year sales forecast for 2020

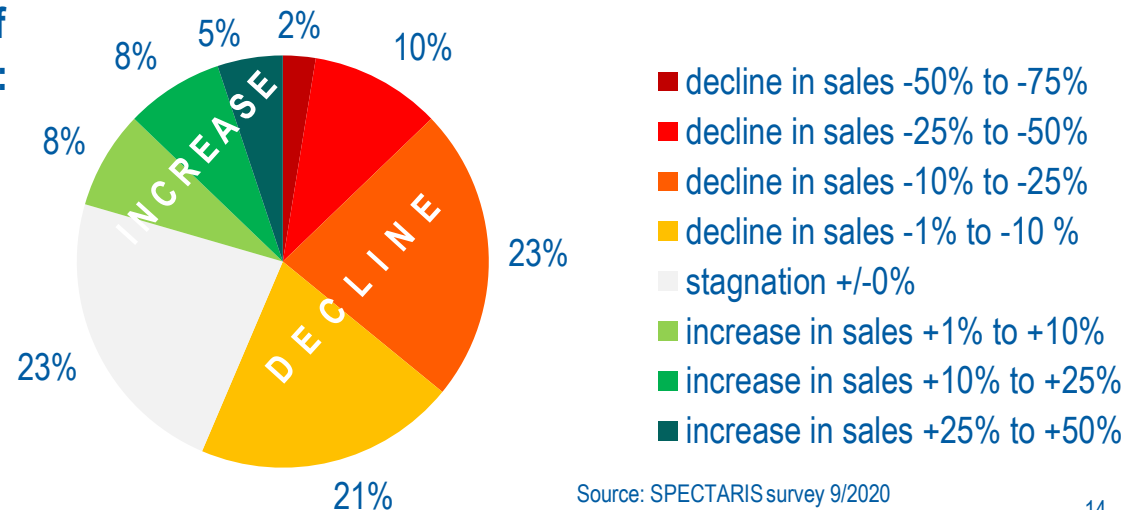
- **Total sales expectation year 2020: -4,0%**
(revenue, weighted average)
- **Sales expectation of survey participants in detail:**



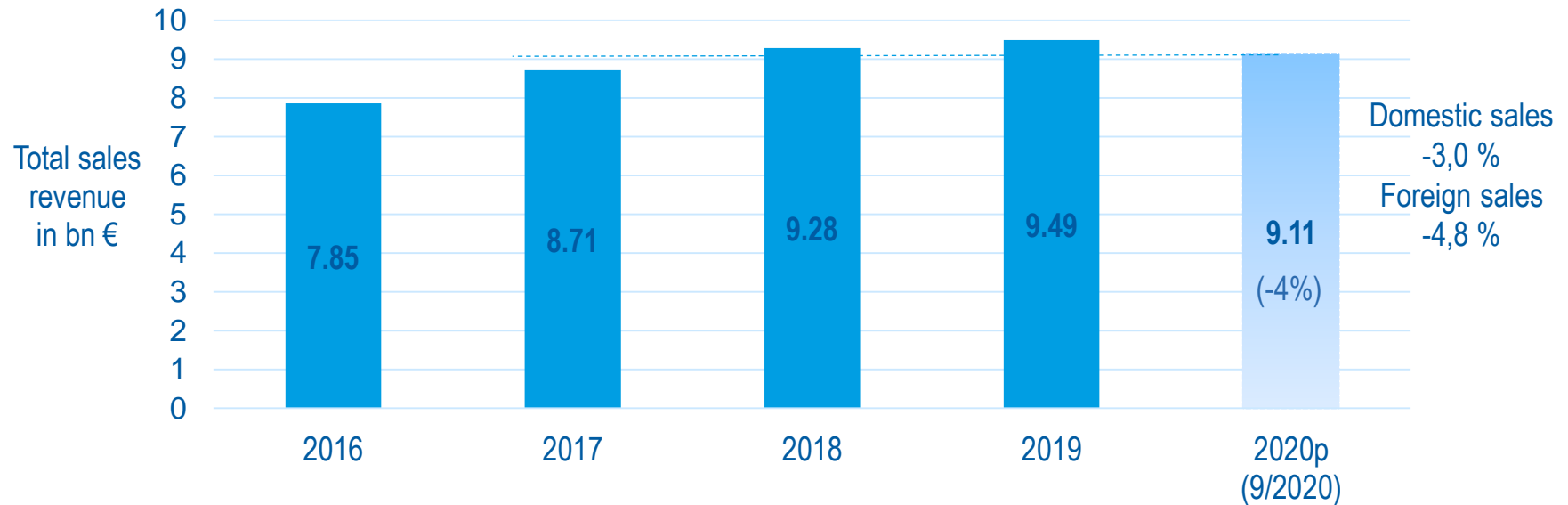
- decline in sales -50% to -75%
- decline in sales -25% to -50%
- decline in sales -10% to -25%
- decline in sales -1% to -10%
- stagnation +/-0%
- increase in sales +1% to +10%
- increase in sales +10% to +25%
- increase in sales +25% to +50%

Foreign sales forecast 2020: International business declining

- **Foreign sales expectation year 2020: -4,8%**
(foreign revenue, weighted average)
- **Foreign sales expectation of survey participants in detail:**



Sales development 2016-2020



Contact

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