Medical Technology

SPECTARIS-Spotlight
Facts and figures of an industry caring for our future health

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The German Medical Technology Industry

€29.2 billion turnover  €27.6 billion turnover
133k employees  130k employees
1.258 companies  1.229 companies

- Data refers to companies ≥ 20 employees
- Retail trade with medical/orthopedic products: 52,000 employees (2014)

Innovative, medium sized, export-oriented

- R&D quota: ~9%
- Export quota: 64%
- Medium sized industry (< 250 employees): 92% of the companies
- Sales growth p.a. 2011–2016 (CAGR): +5.0%

Top 5 target countries for German exports

<table>
<thead>
<tr>
<th>Country</th>
<th>2016 (billion EUR)</th>
<th>2015 (billion EUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>3.76</td>
<td>3.62</td>
</tr>
<tr>
<td>China</td>
<td>1.68</td>
<td>1.54</td>
</tr>
<tr>
<td>France</td>
<td>1.43</td>
<td>1.32</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>1.33</td>
<td>1.29</td>
</tr>
<tr>
<td>Italy</td>
<td>1.08</td>
<td>1.06</td>
</tr>
</tbody>
</table>

Top 5 countries of origin for German imports

<table>
<thead>
<tr>
<th>Country</th>
<th>2016 (billion EUR)</th>
<th>2015 (billion EUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>4.04</td>
<td>3.92</td>
</tr>
<tr>
<td>Switzerland</td>
<td>1.79</td>
<td>1.71</td>
</tr>
<tr>
<td>China</td>
<td>0.93</td>
<td>0.87</td>
</tr>
<tr>
<td>Japan</td>
<td>0.76</td>
<td>0.71</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>0.62</td>
<td>0.59</td>
</tr>
</tbody>
</table>

Sources: Federal Statistics Office, Eurostat, SPECTARIS
Medical Technology Industry in Europe: Germany ranks No.1

51% of the German Medical Technology are exported to European countries

- Germany: €26.21 billion
- France: €10.74 billion
- Spain: €1.98 billion
- Switzerland: €4.22 billion
- Italy: €9.03 billion
- The Netherlands: €1.61 billion
- Ireland: €11.62 billion
- Finland: €2.27 billion
- Denmark: €2.00 billion
- Sweden: €2.00 billion
- Remaining Europe: €9 billion EUR

Total Europe: €90 billion EUR

Note: Data refers to the respective total turnover of the local manufacturers in 2015 (excluding IVD)

Sources: Eurostat, SPECTARIS
The World Market for Medical Technology is still growing

Expected share of the product segment on the total market in 2022

Expected average market growth 2015 – 2022

» Note: Size of bubbles is equivalent to sales value in 2022
   Turnover (including IVD) ➔ Year 2015: about 370 billion USD
   ➔ Year 2022: 530.8 billion USD (CAGR 2015–2022: +5.2%)


Germany is the third largest producer of medical technology products in the world

About 320 billion USD

» Note: Data refers to Year 2015 (excluding IVD)

Sources: SPECTARIS
(Calculated on the basis of data of GTAI, U.S. CommercialService and Eurostat)
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