

Medical Technology

SPECTARIS-Spotlight

Facts and figures of an industry caring for our future health



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+49 30 41 40 21 – 17

Contact

SPECTARIS e. V.
Werderscher Markt 15
10117 Berlin
Germany
www.spectaris.de
medizintechnik@spectaris.de

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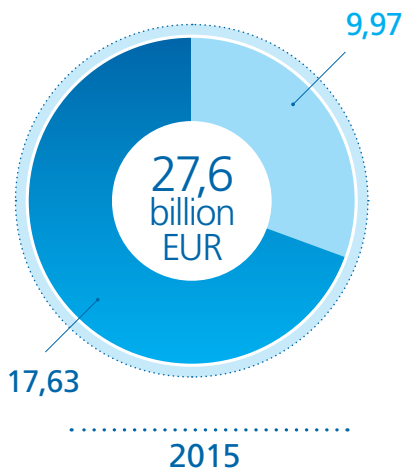
The German Medical Technology Industry

€27,6 | €25,4 130k | 125k 1.229 | 1.206
 billion turnover employees companies

■ 2015 ■ 2014

- » 2014 / 2015: revised values; conditionally comparable with previous year's value
- » Data refers to companies ≥ 20 employees (without small businesses)
- » Including small businesses: 25,93 billion Euro turnover, 12.300 commercial enterprises, 193.000 employees (2013)
- » Retail trade with medical/orthopedic products: 54.000 employees (2013)

Innovative, medium sized, export-oriented

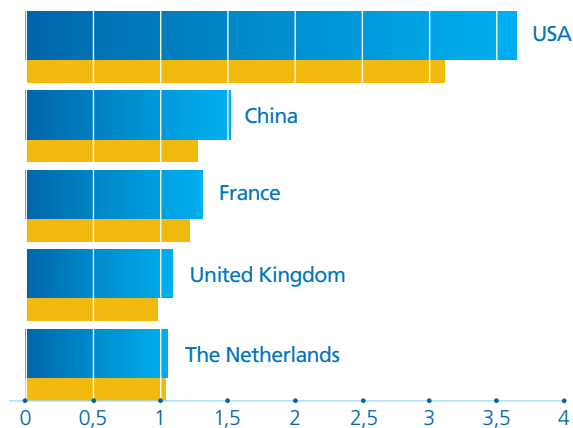


- R&D quota: $\approx 9\%$
- Export quota: 64%
- Medium sized industry: 92% of the companies <250 employees
- Sales growth p.a. 2010 – 2015 (CAGR): $4,9\%$
- Market growth Germany p.a. 2014-2019 (CAGR forecast): $+5,5\%$

■ Export turnover ■ Domestic turnover

Sources: Federal Statistics Office, Eurostat, Espicom

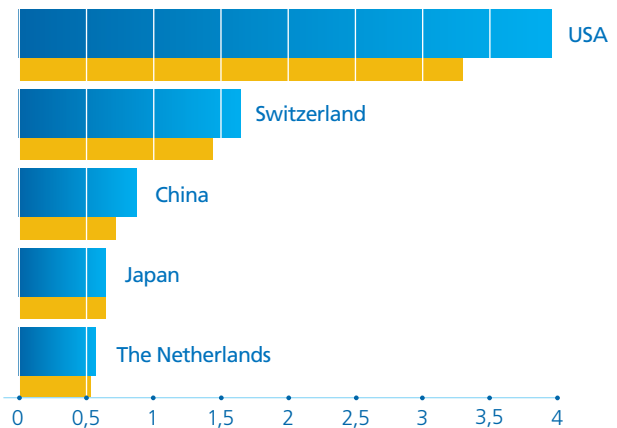
Top 5 target countries for German exports



■ 2015 (billion EUR) ■ 2014 (billion EUR)

Sources: Federal Statistics Office

Top 5 countries of origin for German imports



■ 2015 (billion EUR) ■ 2014 (billion EUR)

Sources: Federal Statistics Office

Medical Technology Industry in Europe: Germany ranks No. 1

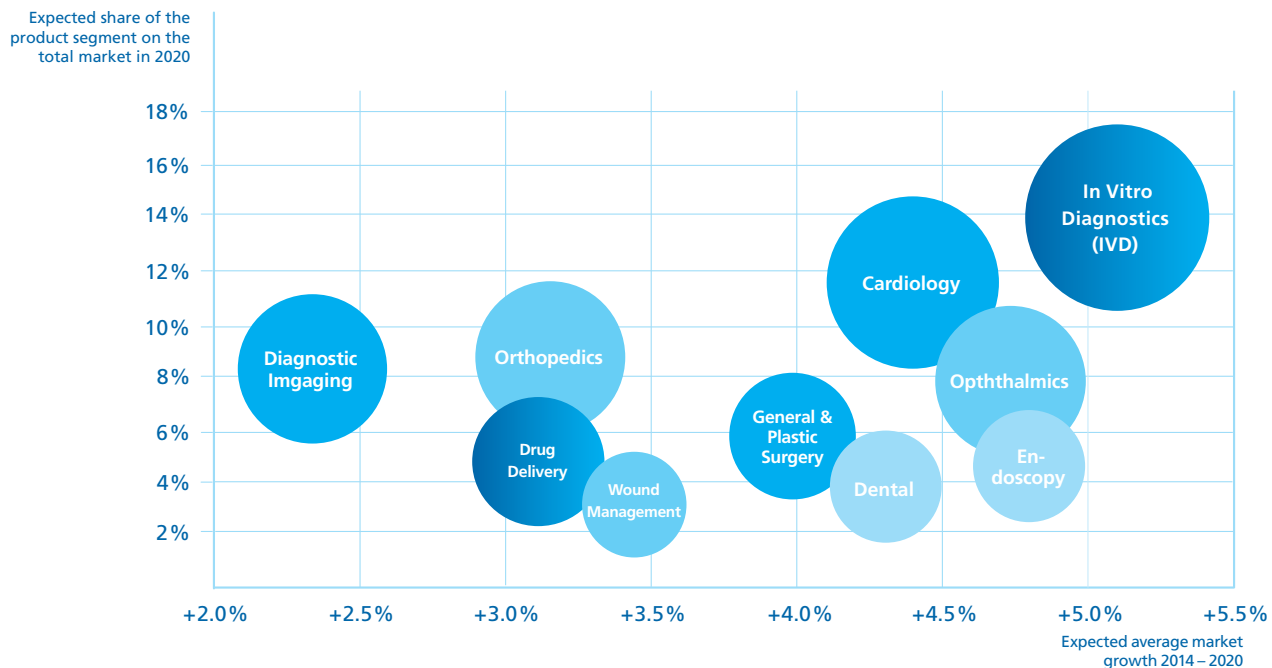


Turnover 2013

- » Note: Including small businesses
 - ¹ including parts of components
 - ² deviating from the year 2012
 - » Remaining Europe: 6,58 billion EUR
- Sources: Eurostat, GTAI, SPECTARIS

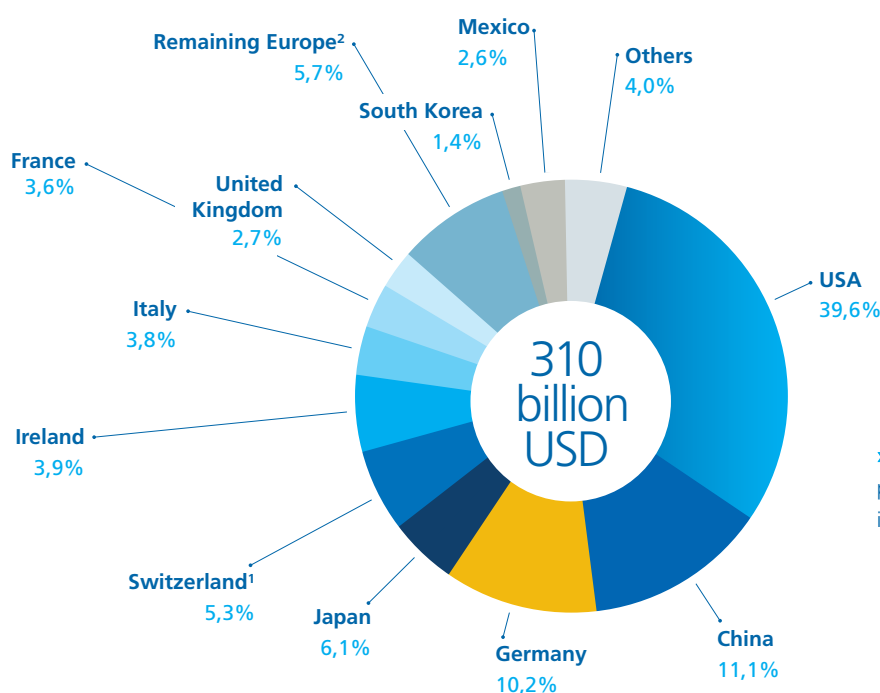
50 % of the
German Medical
Technology are
exported to European
countries

The World Market for Medical Technology is still growing



» Note: Size of bubbles is equivalent to sales value in 2020
 Turnover (including IVD) → Year 2020: 477,5 billion US-Dollar (CAGR 2014 – 2020: 4,1 %)
 Sources: EvaluateMedTech® World Preview 2015, Outlook to 2020, Evaluate Ltd, www.evaluate.com

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



» Note: Data refers to the domestic production of the respective country in 2014 (without offshore production)

¹ Including trade
² without Russia

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

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Modebrillen B B&B EYEWEAR / B.Braun Avitum Saxonia / Bauer und Häselbarth Chirurg / Bausch & Lomb / Befort Wetzlar OD / Belimed Deutschland / Berghof Products + Instruments / Berliner Glas / Bierther Submikron / BITMOS Gesellschaft für Medizintechnik / BLANCO CS / bon Optic Vertriebsgesellschaft / Bosch + Sohn / BRAND / Breas Medical / Breitfeld & Schliekert / BÜCHI Labortechnik C Carl Martin / Carl Zeiss / Carl Zeiss Jena / Carl Zeiss Meditec / Carl Zeiss Microscopy / Carl Zeiss Sports Optics / Carl Zeiss Surgical / Carl Zeiss Vision / Christoph Miethke / clearlab / Coherent Kaiserslautern / Coherent LaserSystems / Condor / Conta Optic / CooperVision / CRYSTAL / CULLMANN GERMANY D Daniel Kürten / Deutsche Augenoptik / DeVilbiss Healthcare / DIETZ / DITABIS / DMB-Apparatebau / Dörr / Dr. Johannes Heidenhain / Dr. K. 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Contact

Marcus Kuhlmann
Head of Medical Technology
Phone: +49 30 41 40 21 – 17
email: kuhlmann@spectaris.de