

# Analytical, bio and laboratory technology

## In brief

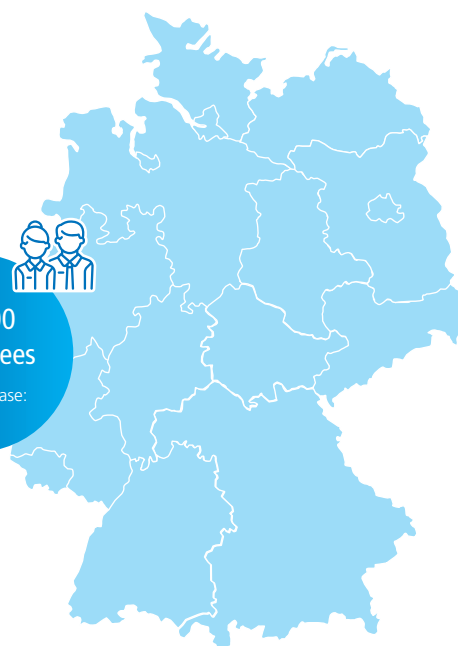
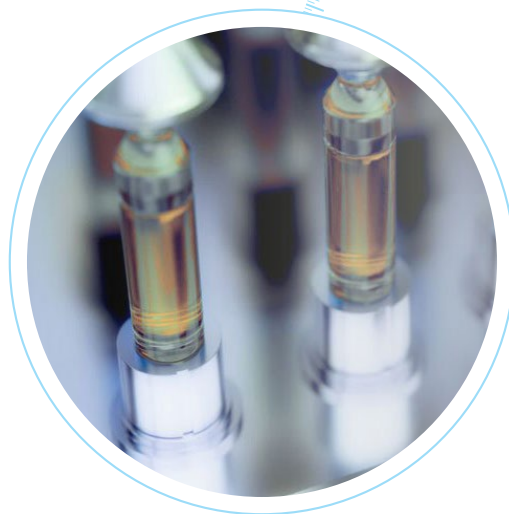
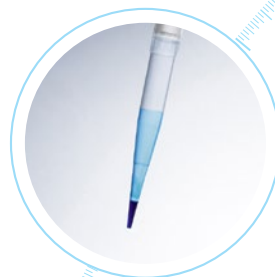
The products of German analytical, bio and laboratory technology can be found in almost every laboratory in the world – analytical and laboratory equipment “made in Germany” enjoys high recognition and is extremely popular worldwide. In 2019, the 330 German companies with their 48,600 employees generated sales of EUR 9.5 billion.

## Industry structure

The German industry for analytical, bio and laboratory technology is strongly characterised by medium-sized companies. The industry is one of the most innovative industries in the German economy, with an export quota of almost 55%, is very export-oriented and a leader in the international environment. Many of the companies are family-run and are hidden champions and world market leaders in their niche market.

## Companies

The list of companies that are members of SPECTARIS can be found at:  
[www.spectaris.de/analysen-und-labortechnik/mitglieder](http://www.spectaris.de/analysen-und-labortechnik/mitglieder)



## Products & technology

- Analytical technology
- Biotechnology
- Laboratory technology
- Consumables
- Process analytics
- Measuring and testing technology

## Customers & markets

- Pharmaceutical industry
- Chemical industry
- Food and environmental analysis
- Life Sciences
- Semiconductor
- Medical technology and medical laboratories
- Academic research

## Opportunities, challenges, trends

Global competition in laboratory technology is increasing, whilst at the same time, the regulatory requirements for manufacturers and products are also rising.

The biggest and most exciting task in the coming years will be to ensure that analytical, bio and laboratory technology is prepared for the IoT-based "Laboratory 4.0" with respect to workflow integration, connectivity and data integrity. The necessary requirements for the indus-

try are diverse and range from the definition of uniform device interfaces to the greater use of robotics and respecting the growing requirements regarding reproducibility and strict compliance.

In the laboratory of the future, also processes and structures must be rethought. This includes the involvement of customers at an earlier stage, and new methods of idea generation which are more intense and continuous to meet better the needs of the customer, e.g. like design thinking.

Last but not least, digitalisation also opens up new business models. Smart services are already available for customers, but these are mostly information platforms for service parts, accessories and consumables and digital manuals - and most are "for free" instead of "for fee". There is enormous potential in the further development of smart services into smart services business models for which the customer pays.

## Further information

- Our trend 2019 "Analytical, Bio and Laboratory Technology – Markets, Developments, Potentials" report provides a detailed overview of the industry (only in German)
- The trend event "Lab.Vision" takes place once a year, alternating at analytica in Munich as Lab.Vision@analytica and as a two-day trend event at a user, most recently at BASF in 2019 and the next will be at Roche in 2021 (event will be held in German).

Analytical, bio and laboratory technology	2016	2017	2018	2019	Dev. 2019/18
<b>Total sales (€ bn.)</b>	7.85	8.71	9.28	9.49	+2.3%
<b>Domestic sales (€ bn.)</b>	3.64	4.17	4.35	4.28	-1.5%
<b>Foreign sales (€ bn.)</b>	4.21	4.54	4.93	5.21	+5.6%
<b>Export rate (%)</b>	53.7	52.1	53.2	54.9	+3.3%
<b>Employees (Thousand)</b>	43.1	44.2	47.0	48.6	+3.4%
<b>Companies</b>	approx. 330				

Companies with 20 employees and more. Data contains rounding differences.  
Source: SPECTARIS



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