Medical Technology

SPECTARIS-Spotlight
Facts and figures of an industry caring for our future health
July 2018
SPECTARIS - Services at a glance

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The German Medical Technology Industry

€ 29.9bn € 29.2bn 138k 133k 1,310 1,258
billion turnover employees companies

2017 2016

- Data refers to companies ≥ 20 employees (without small businesses)
- Including small businesses: 32.39 billion Euro turnover, 12,500 commercial enterprises, 198,000 employees (2016)
- Retail trade with medical/orthopedic products: 59,300 employees (2016)

Innovative, medium sized, export-oriented

- R&D quota: ≈ 9%
- Export quota: 64%
- Medium sized industry: 93% of the companies <250 employees
- Sales growth p.a. 2010–2017 (CAGR): 4.7%

Top 5 target countries for German exports

<table>
<thead>
<tr>
<th>Country</th>
<th>2017 (billion EUR)</th>
<th>2016 (billion EUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>4.05</td>
<td>3.96</td>
</tr>
<tr>
<td>China</td>
<td>1.75</td>
<td>1.68</td>
</tr>
<tr>
<td>France</td>
<td>1.46</td>
<td>1.44</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>1.50</td>
<td>1.35</td>
</tr>
<tr>
<td>Italy</td>
<td>1.11</td>
<td>1.09</td>
</tr>
</tbody>
</table>

Top 5 countries of origin for German imports

<table>
<thead>
<tr>
<th>Country</th>
<th>2017 (billion EUR)</th>
<th>2016 (billion EUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>4.10</td>
<td>4.10</td>
</tr>
<tr>
<td>Switzerland</td>
<td>1.67</td>
<td>1.78</td>
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<tr>
<td>China</td>
<td>1.02</td>
<td>0.93</td>
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<tr>
<td>Japan</td>
<td>0.73</td>
<td>0.77</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>0.72</td>
<td>0.64</td>
</tr>
</tbody>
</table>

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

- **Germany** 🇩🇪: €32.39 billion
- **United Kingdom** 🇬🇧: €8.15 billion
- **Ireland** 🇮🇪: €11.62 billion
- **Switzerland** 🇨🇭: €4.22 billion
- **France** 🇫🇷: €11.02 billion
- **Spain** 🇪🇸: €2.01 billion
- **Sweden** 🇸🇪: €2.28 billion
- **Denmark** 🇩🇰: €2.09 billion
- **Austria** 🇦🇹: €1.70 billion
- **Italy** 🇮🇹: €9.51 billion

- **Note:** Data refers to the respective total turnover of the local manufacturers in 2015/last available year (including small businesses)
- Remaining Europe: 10 billion EUR
- Europe in total: 95 billion EUR

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

The world market 2018 for medical technology by sector

- Orthopedics 13.2%
- Minimally Invasive Medicine 11.6%
- Cardiology 9.5%
- Ophthalmics 8.5%
- Wound Management 5.7%
- Audiology 4.7%
- Patient Monitoring 5.5%
- Respiratory / Anesthesia 4.7%
- Urology / Gynecology 2.8%
- Neurology 1.9%
- Robotic Assistance Systems 1.9%
- Other sectors 28.1%

The world market 2018 for medical technology by region

- USA 38.9%
- China 8.1%
- Germany 9.9%
- Japan 8.9%
- Rest of the world 19.8%
- Brazil 1.1%
- Spain 2.0%
- Russia 2.1%
- France 4.0%
- United Kingdom 4.0%
- India 1.2%

» Expected total market growth 2018: +5.2%
» Expected total market growth 2016–2022 (CAGR): +5.1%

Source: Frost & Sullivan, EvaluateMedTech
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