

Medical Technology

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

July 2018



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SPECTARIS
Medical Technology



SPECTARIS - Services at a glance



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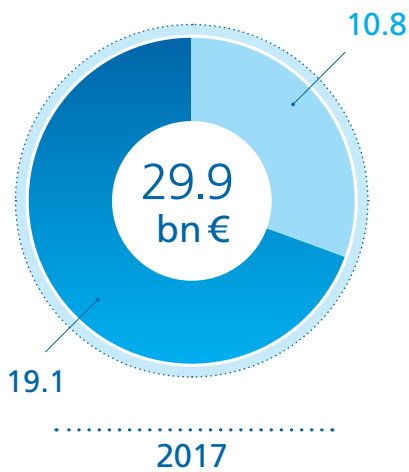
The German Medical Technology Industry

€ 29.9 | € 29.2 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

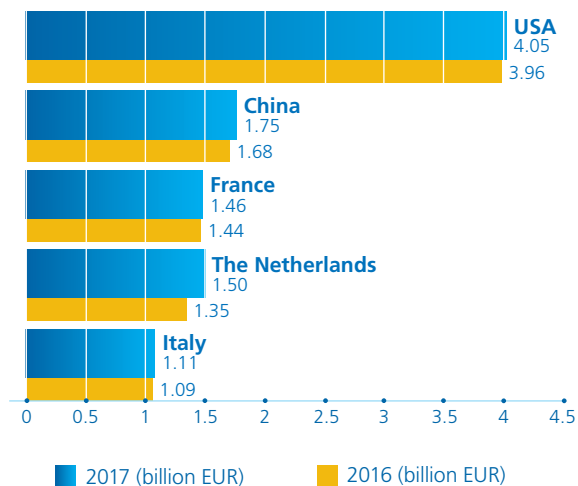


- R&D quota: $\approx 9\%$
- Export quota: 64 %
- Medium sized industry: 93 % of the companies <250 employees
- Sales growth p.a. 2010–2017 (CAGR): 4.7 %

■ Export turnover ■ Domestic turnover

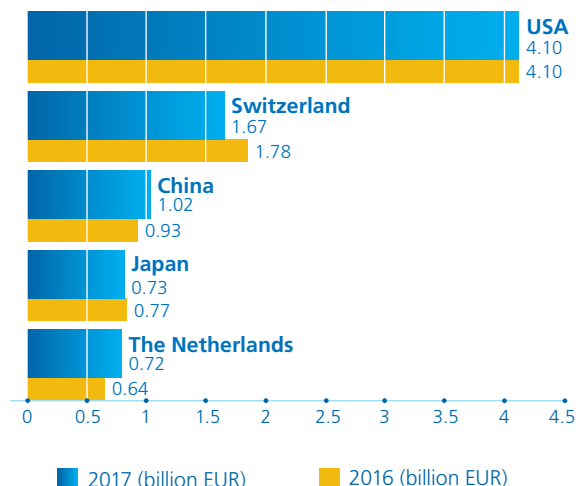
Sources: Federal Statistics Office, Eurostat, SPECTARIS

Top 5 target countries for German exports



Sources: Federal Statistics Office, SPECTARIS

Top 5 countries of origin for German imports



Sources: Federal Statistics Office, SPECTARIS

Medical Technology Industry in Europe: Germany ranks No. 1



» 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

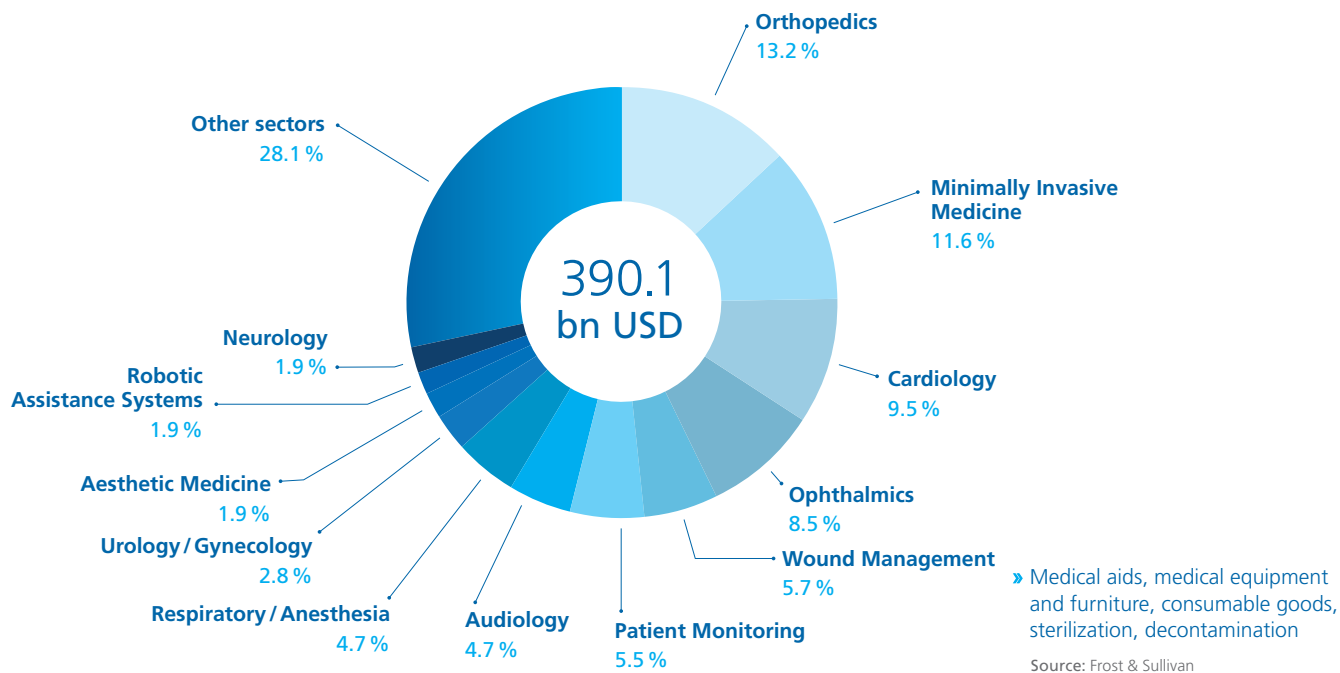
» Europe in total: 95 billion EUR

Source: Eurostat, SPECTARIS

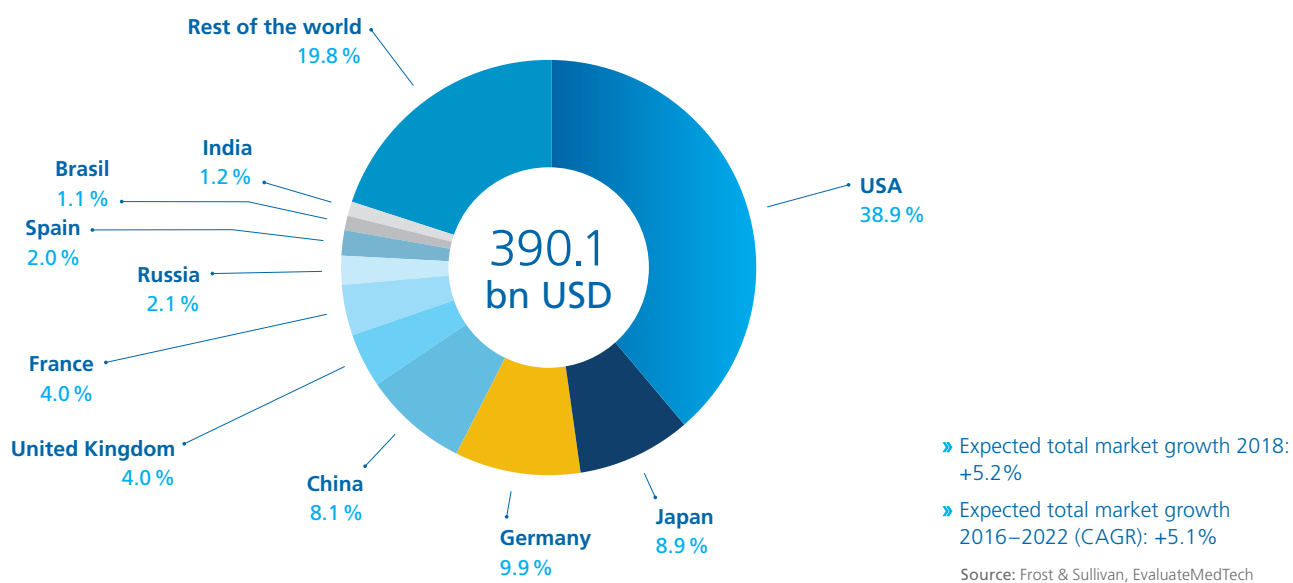
52% of the German Medical Technology are exported to European countries

The World Market for Medical Technology is still growing

The world market 2018 for medical technology by sector



The world market 2018 for medical technology by region



We are SPECTARIS



A A. SCHWEIZER / **Abbott** / Adolf Thies / ADOS / AESCULAP / Agilent Technologies Deutschland / **air-be-c** Medizintechnik / ALCON Pharma / ALS Automated Lab Solutions / **Alu Rehab** / AMO Germany / Analytik Jena AG / **Andreas Hettich** / AOYAMA Optical Germany / Arnold & Richter / ARRI Lightning Stephanskirchen / **ASANUS** Medizintechnik / asecos / asphericon / **ATMOS** MedizinTechnik / **aXcent medical** / Axel Semrau **B B.** **Braun Avitum Saxonia** / **Bauer und Häselbarth-Chirurg** / Bausch & Lomb / Befort Wetzlar OD / **Belimed** / Berghof Products + Instruments / Berliner Glas / Bierther Submikron / Blue Ocean Nova / **bon Optic** / **BOSCH + SOHN** / BOW Berliner Optikwelt / BRAND / **BREAS Medical** / Breitfeld & Schliekert / BÜCHI Labortechnik / **Burmeier GmbH** **C** **Carl Martin** / Carl Zeiss / Carl Zeiss Jena / **Carl Zeiss Meditec** / **Carl Zeiss Microscopy** / Carl Zeiss Sports Optics / **Carl Zeiss Surgical** / Carl Zeiss Vision / CETONI / **Christoph Miethke** / Clearlab / Coherent / Coherent Kaiserslautern / Coherent LaserSystems / **Condor Medizintechnik** / CooperVision / CRYSTAL / CULLMANN GERMANY **D** Deutsche Augenoptik AG / **DeVilbiss Healthcare** / DITABIS / **DMB Apparatebau** / **DOCERAM Medical Ceramics** / Dörr / DR. 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Vertriebs** / mark'ennovy / Martin Christ Gefriertrocknungsanlagen / **Matachana Germany** / Mauser Einrichtungssysteme / **MEDICARE Medizinische Geräte** / **Medicon** / **MELAG Medizintechnik** / **Memmert** / Menicon / MERSEN Deutschland / **Messer Group** / Metrolux Optische Messtechnik / Mettler Toledo / **MEYER-HAAKE** / **Miele & Cie.** / **Mikrop** / MINOX / **MMM Medcenter Einrichtungen** / **MÖLLER-WEDEL** / **MÖLLER-WEDEL-OPTICAL** / MPG&E / **MPV MEDICAL** / Müller-Welt Contactlinsen / **Münchener Medizin Mechanik** **N** **NanoFocus** / **NDI Europe** / NEOSTYLE / Netzsch Gerätebau / Neumaier Logistics / Newport Spectra-Physics / **NIKA Optics** / Nikon / Novacel / nova motum Services & Consulting / Novoflex Präzisionstechnik **O** **OASYS** / **OBE-Präzision** / **OBERON** / **Oculus Optikgeräte** / **OFA Bamberg** / OHARA / OLYMPUS Deutschland / **Olympus Europa** / **OLYMPUS Winter & Ibe** / op Couture Brillen / opdo Walter Sengespeick / Optics Balzers Jena / Optische Werke G. 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Note: Highlighted companies are medical technology companies