Medical Technology

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



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Medical Technology

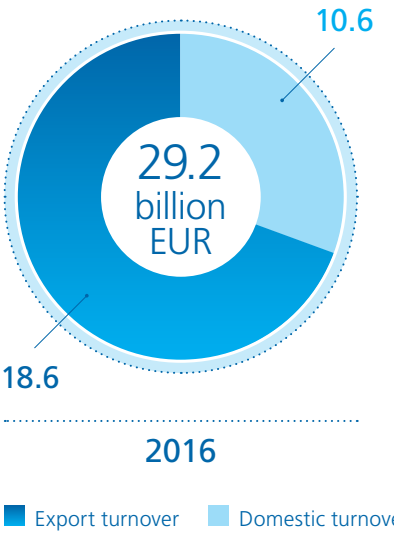
The German Medical Technology Industry

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

2016 2015

» Data refers to companies ≥ 20 employees
» Including small businesses: 26.21 billion EUR turnover, 12.550 commercial enterprises, 200.230 employees (2015)
» Retail trade with medical/orthopedic products: 52.000 employees (2014)

Innovative, medium sized, export-oriented

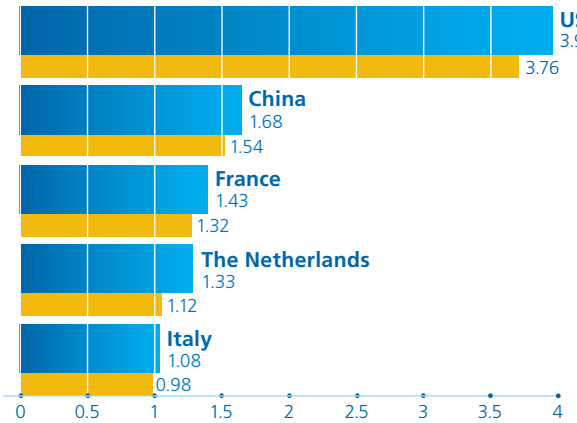


- R&D quota: ~9%
- Export quota: 64%
- Medium sized industry (<250 employees): 92% of the companies
- Sales growth p.a. 2011–2016 (CAGR): +5.0%

Export turnover Domestic turnover

Sources: Federal Statistics Office. Eurostat, SPECTARIS

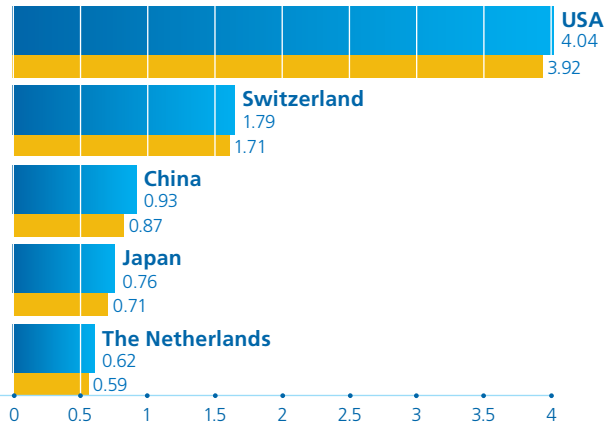
Top 5 target countries for German exports



2016 (billion EUR) 2015 (billion EUR)

Sources: Federal Statistics Office, SPECTARIS

Top 5 countries of origin for German imports



2016 (billion EUR) 2015 (billion EUR)

Sources: Federal Statistics Office, SPECTARIS

Medical Technology Industry in Europe: Germany ranks No.1



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

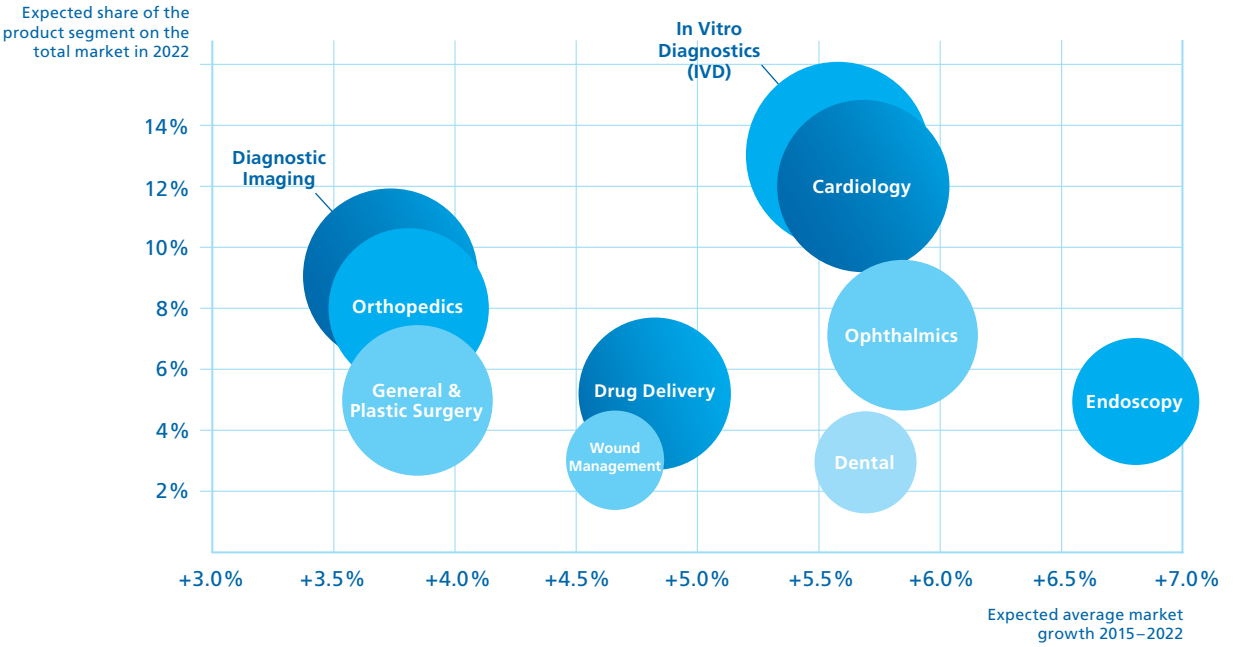
» Note: Data refers to the respective total turnover of the local manufacturers in 2015 (excluding IVD)

» Remaining Europe: 9 billion EUR

» Total Europe: 90 billion EUR

Sources: Eurostat, SPECTARIS

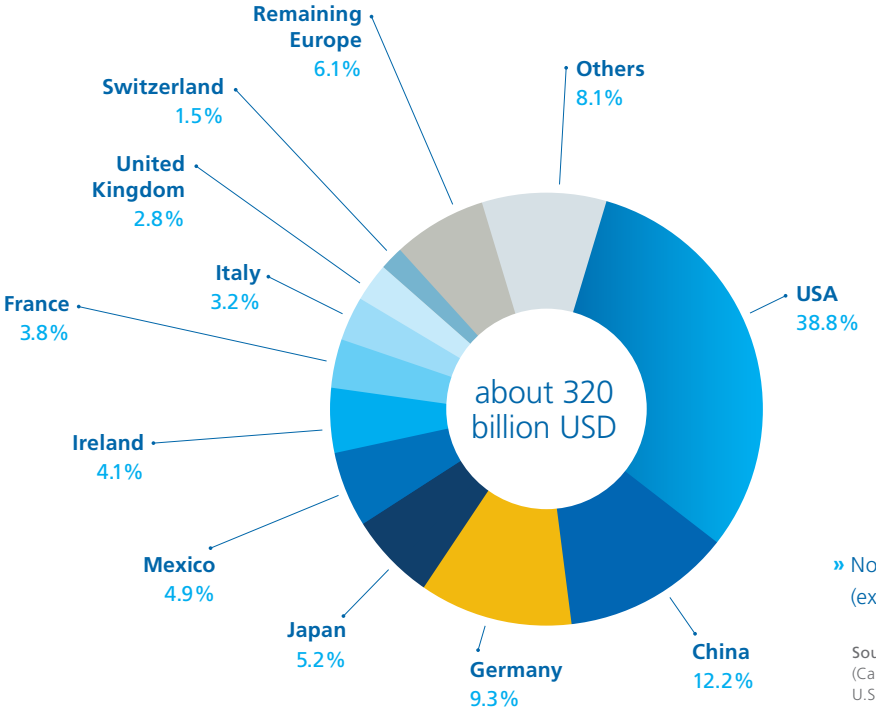
The World Market for Medical Technology is still growing



» 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%)

Sources: EvaluateMedTech® World Preview 2016, Outlook to 2022, Evaluate Ltd, www.evaluate.com

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



» 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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We inform you about current developments within the industry and offer access to important economic and market data.

Representing your interests

We speak up for your interests, guide decision-making processes and are a competent contact for politics and media.

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Please do not hesitate to contact us for further information:
+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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Contact

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

Note: Highlighted companies are medical technology companies