

Press conference of Messe München

12th of October 2020, analytica

The laboratory sector under the impact of the corona virus pandemic

Bridge building: From LSR to IVD-Tests, to Vaccines and Drugs



Immediate LSR and IVD response: The establishment of protocols and the production of reagents for nucleic acid extraction and qPCR were available within a very short time for the fast and reliable detection of SARS-CoV-2.



Vaccine research: The biotechnology and pharmaceutical industries are working flat out on the development of vaccines. The spectrum of possible SARS-CoV-2 vaccine types ranges from RNA-based to replicating viral vector to protein subunits.



Drug research: Many candidates in current drug research were originally tested against other pathogens such as Ebola or Malaria. Covid-19 offers a new potential field of medicinal application for Remdesivir or Hydroxychlorquine.

Diagnostics Industry

Products for in vitro
analysis of samples from
human body for...

Medical laboratory (medical
practice, hospital),
Self-testing by patients (e.g.
blood glucose self-monitoring)

Products

Consumables
Control material
Reagents
Test kits
Instruments
Devices
Systems
Technologies

Life Science Research Industry

Products for basic and
applied research in the life
science for..

Research laboratories in
medicine, biotechnology,
chemical/pharmaceutical
industry, forensics, food
analysis, archaeology etc.

IVD and LSR market - comparable products, but different developments

IVD market 2019

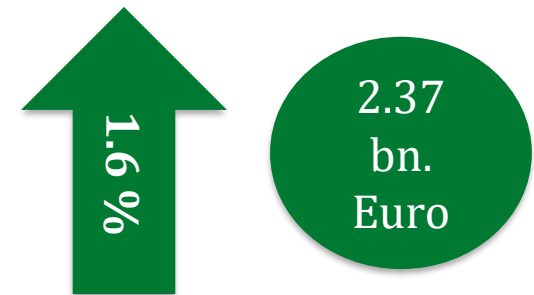
Stagnation over several years



- **Highly regulated market (health insurance)**
- **Budgeting of physicians**
- **Price erosion**

LSR market 2019

Reversal of long-term
very positive trend

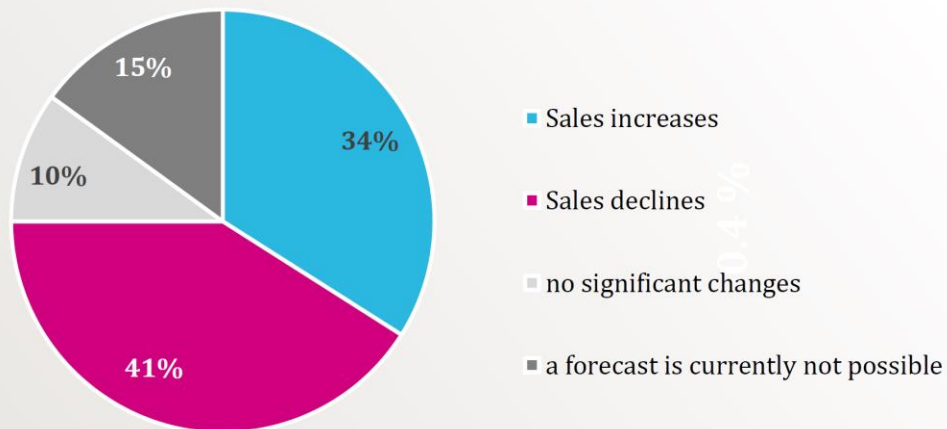


- **Laboratory capacities reached ?**
- **Lack of skilled personnel ?**

IVD and LSR market - comparable products, but different developments

IVD market 2020

Almost half of the companies reported a decline,
more than a third reported increasing sales.

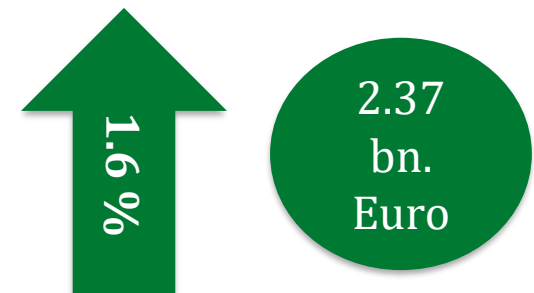


Source: VDGH member survey September 2020



LSR market 2019

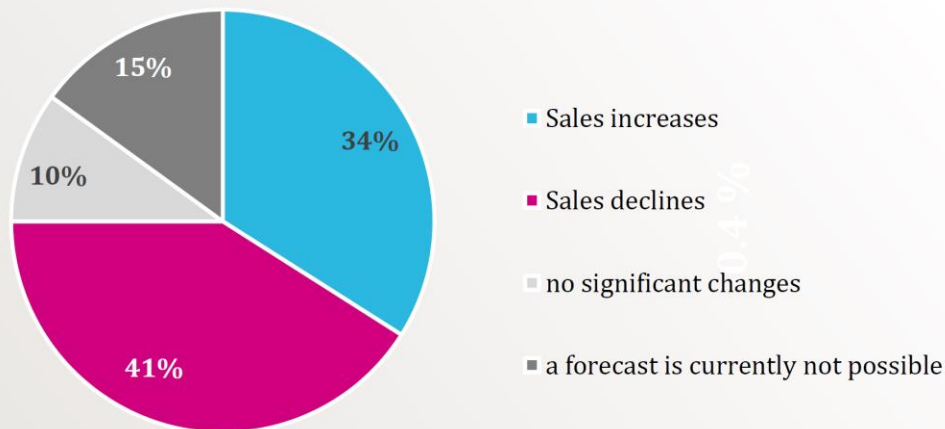
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IVD and LSR market - comparable products, but different developments

IVD market 2020

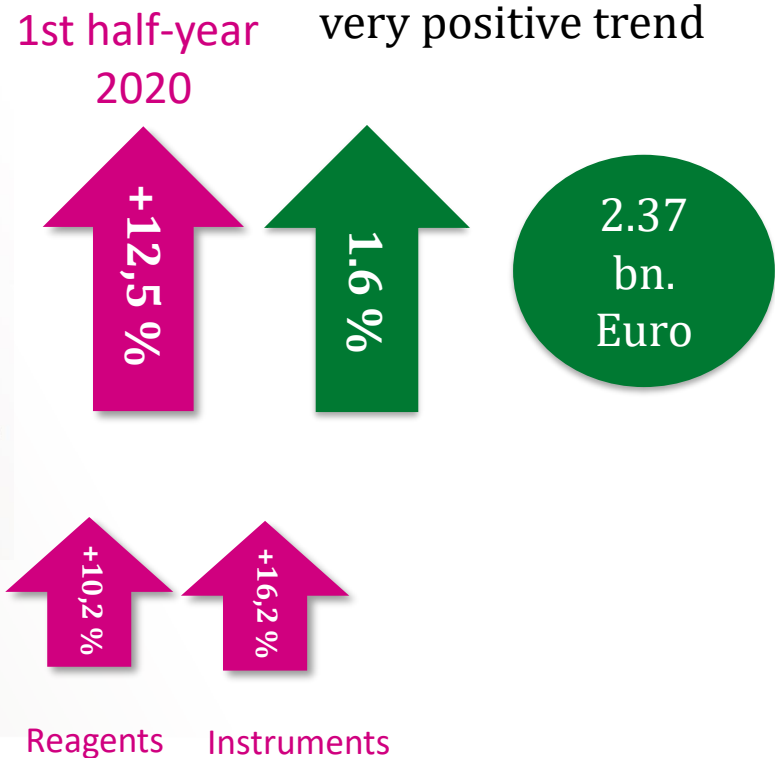
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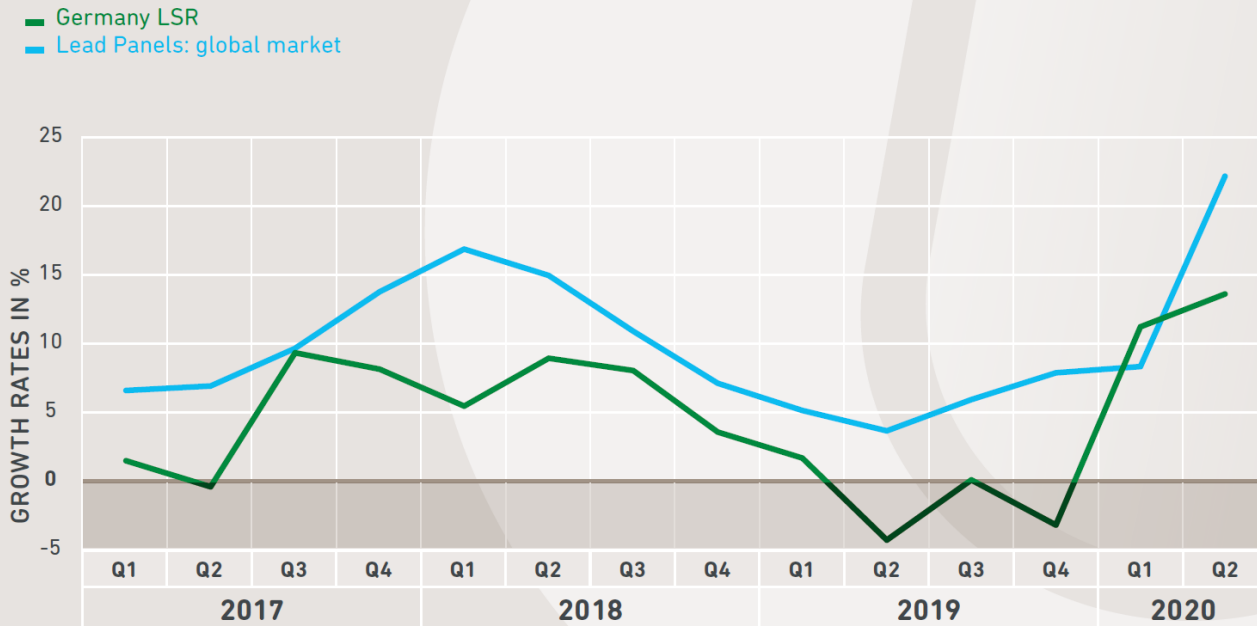
LSR market 2019

Reversal of long-term
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International comparison

Benchmarking the LSR market in Germany with the global LSR market*

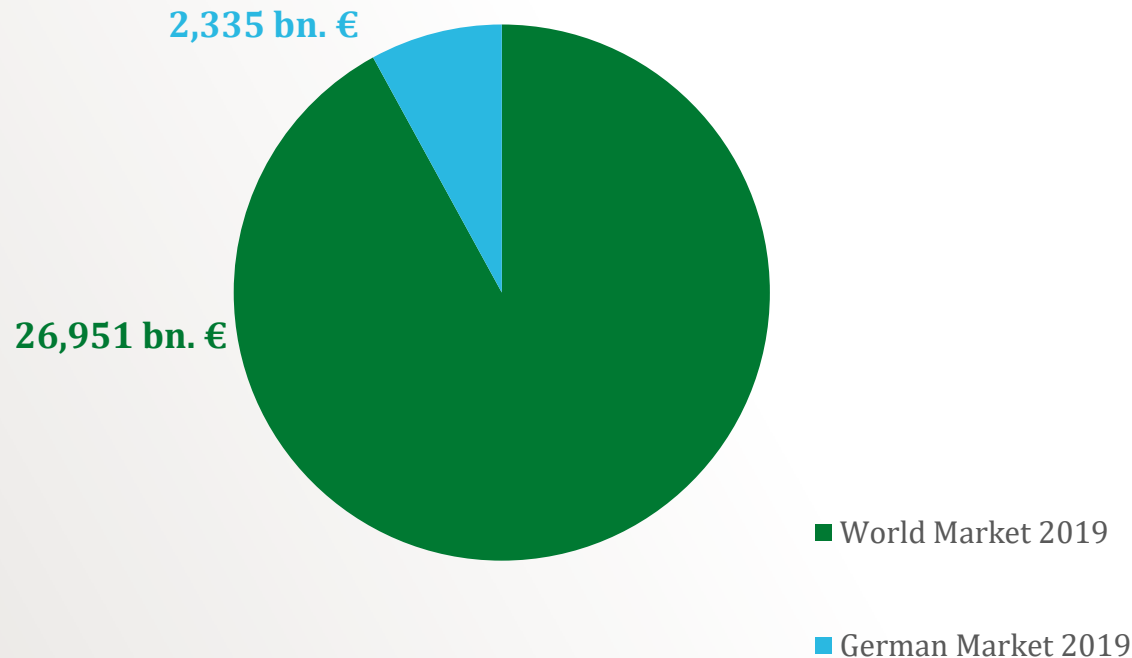


Source: VDGH member companies provide data to quarterly surveys of the LSR Market Research Committee
Figure: LSR Market Research Committee in the Association of the Diagnostics Industry

* Comparison of the quarterly dynamics of international, listed companies with the German LSR market 2017–2020

- **Lead panels** = groups of international companies listed on the stock markets; representing the segments
 - LSR Reagents
 - LSR Instruments
 - Molecular Diagnostics
- Lead panels did generally grow 5 – 10% stringer than LSR
- 2019 was a weak year internationally
- **Trend reversal 2020 occurs earlier in Germany**

International comparison



German share = 8,7%

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LSR & IVD industries incredibly fast ramp up

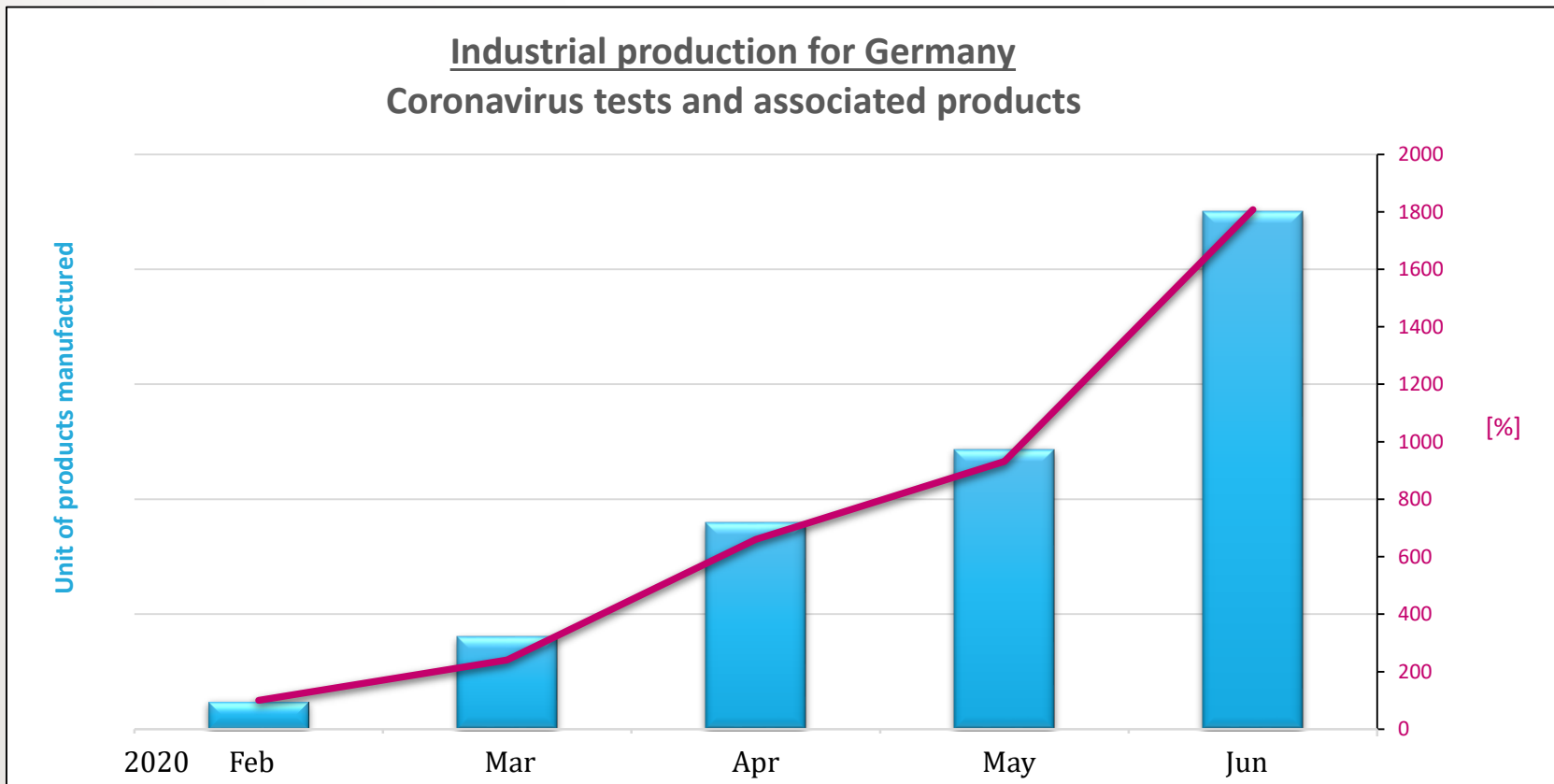


Figure: Availability of coronavirus tests and associated products (e.g. swabs, extraction kits, devices) for Germany, increase in percent.
Source: VDGH membership survey of May 2020)

1. virtual LSR Spotlight Forum:

Life Science Spotlight 2020

LSR Spotlight
Forum Program
www.analytica.de
Presented in
cooperation with
Messe München

Dial in!

October, 20th
2:00 p.m. – 4:00 p.m.

 <https://lsr.vdgh.de/>

Thank you !!