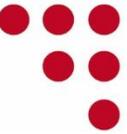


HEALTH  
TECH  
CLUSTER  
SWITZERLAND

Dr. Patrick Dümmler  
Cluster Manager  
Health Tech Cluster Switzerland

**Switzerland as a Health Tech Hub**  
3. Polish-Swiss Roundtable  
Pfäffikon SZ, November 9th, 2016



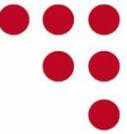
# Excerpts from the LIMEDex Index Study

## LIMEDex Index® – Swiss Medtech Country Report 2016

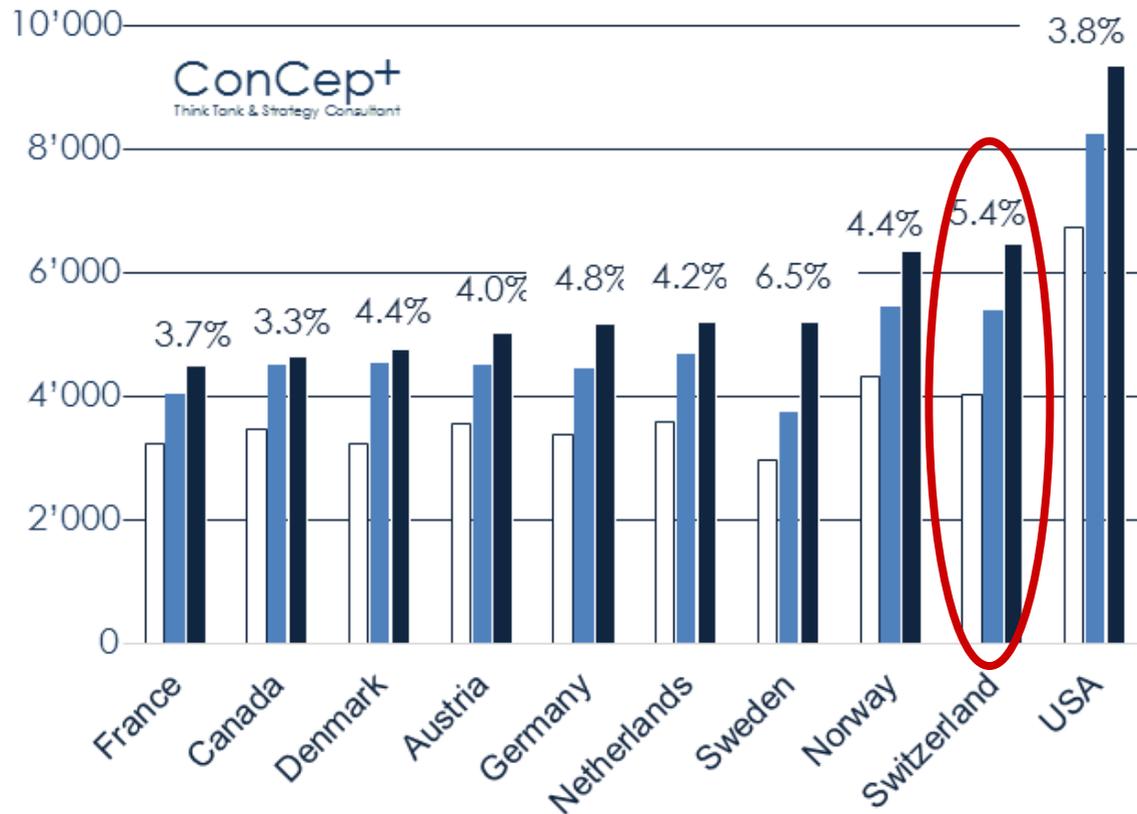


Prepared by ConCepus –  
Think Tank & Strategy  
Consultant

Available on  
[www.conceplus.com](http://www.conceplus.com)



# Switzerland has an attractive healthcare market



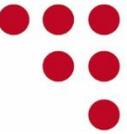
Healthcare expenses per capita<sup>1</sup> [USD bn PPP]

CAGR 2005-2014 in %

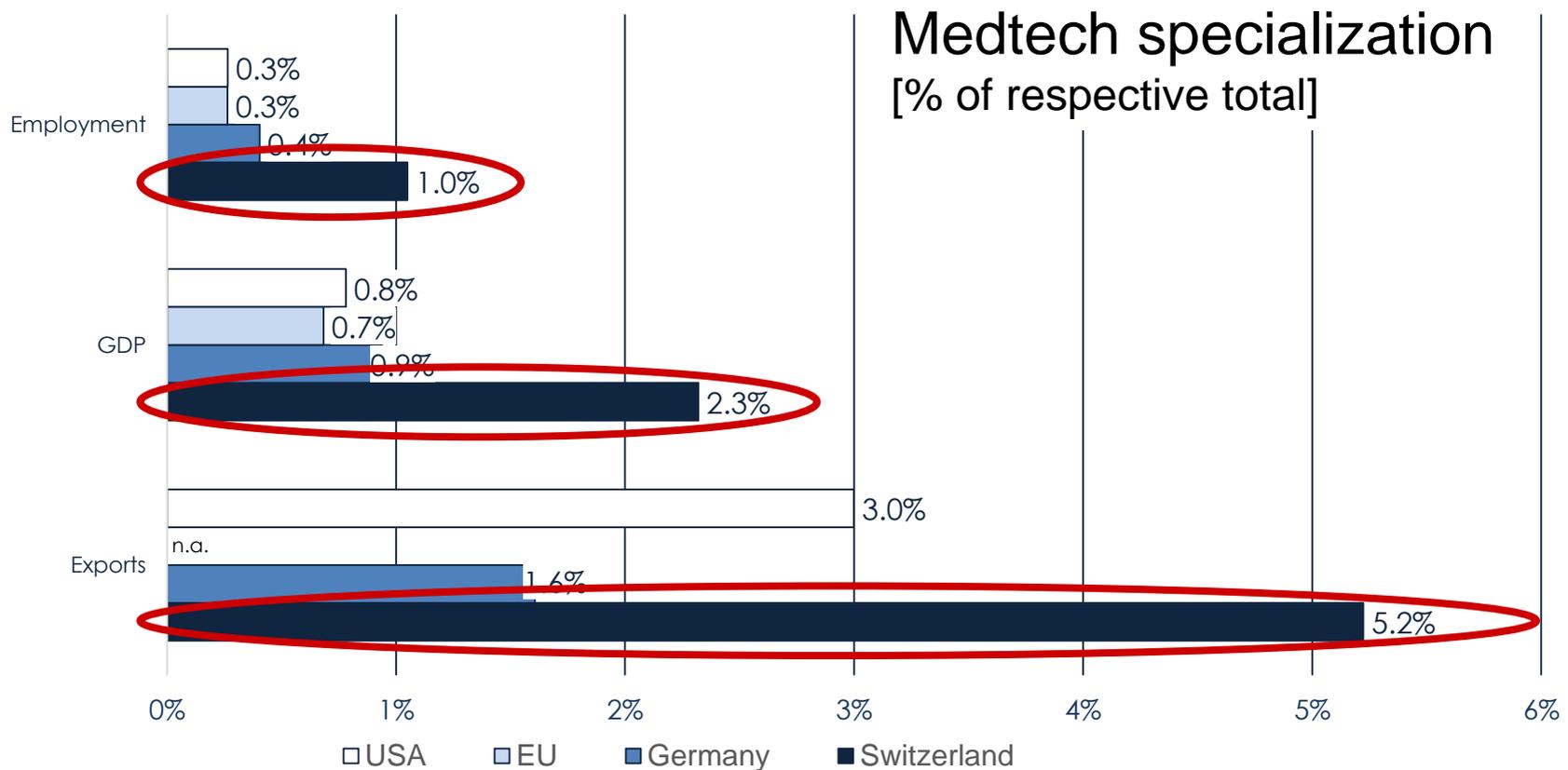
□ 2005 ■ 2010 ■ 2014

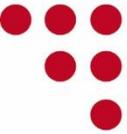
1) Total health expenditure per capita in USD, Purchasing Power Parity (PPP), shown are countries with the 10 biggest health expenses per capita

2) According to WHO data Monaco and Luxembourg have higher per capita expenses than Switzerland but are omitted here due to their very limited absolute market size



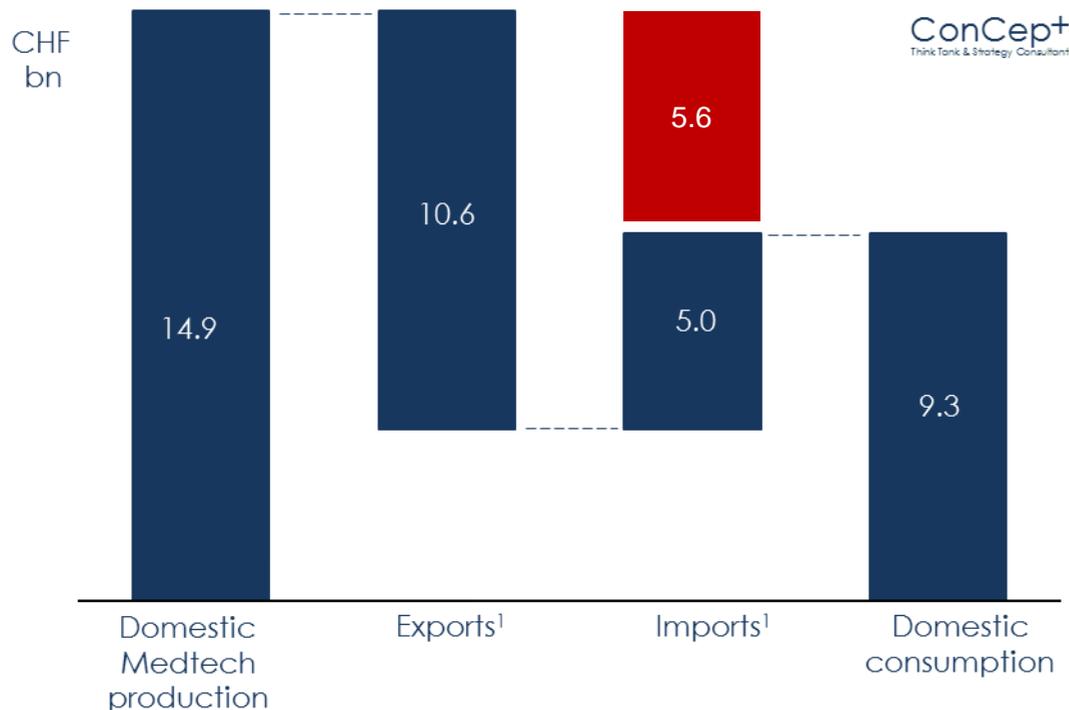
# Switzerland has a very high relative medtech share





# Manufacturing of medtech products was 14.9 bn

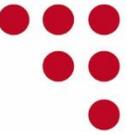
## Swiss Medtech Trade 2015 [in CHF bn]



## Comments

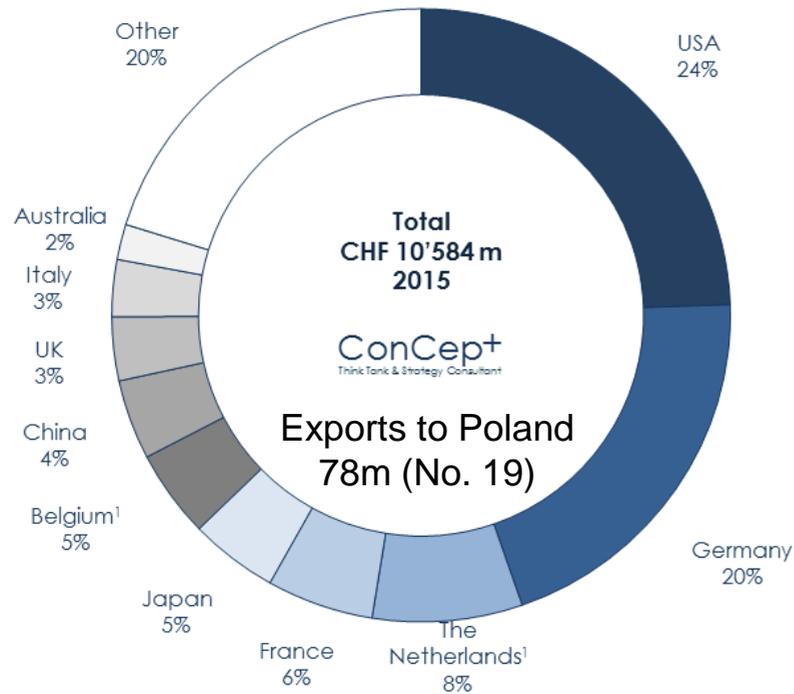
- Domestic Swiss Medtech production is estimated at CHF 14.9bn growing by 1.8% vs. 2014
- In 2015 Switzerland exported Medtech devices worth CHF 10.6bn (no change to 2014)
- Medtech imports represented a value of CHF 5.0bn in 2015 (+1.1% vs. 2014)
- Based on above figures domestic consumption was CHF 9.3bn and grew by 3.6% vs. 2014
- The Swiss Medtech trade surplus of CHF 5.6bn represents 15.4% of total Swiss trade surplus in goods

1) Reflects finished goods only  
Source: Own calculations based on data from Swiss Federal Customs Administration; ConCep+ LIMEDex Index - Swiss Medtech Country Report 2016

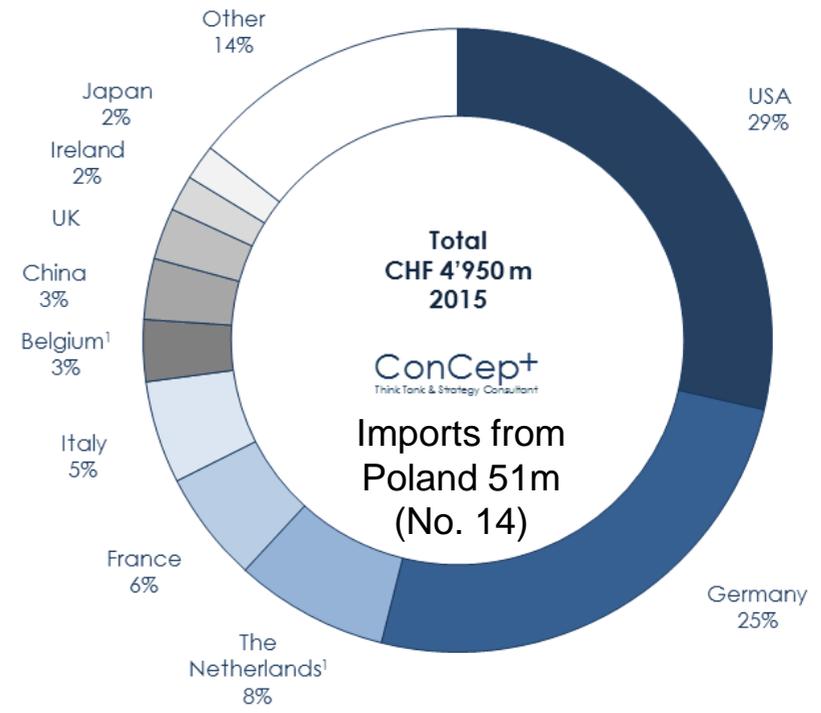


# The US and Germany are the most important trading partners – Poland among top 20

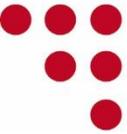
Top 10 Swiss export destinations  
[% share of total Medtech exports, 2015]



Top 10 Swiss import sources  
[% share of total Medtech imports, 2015]



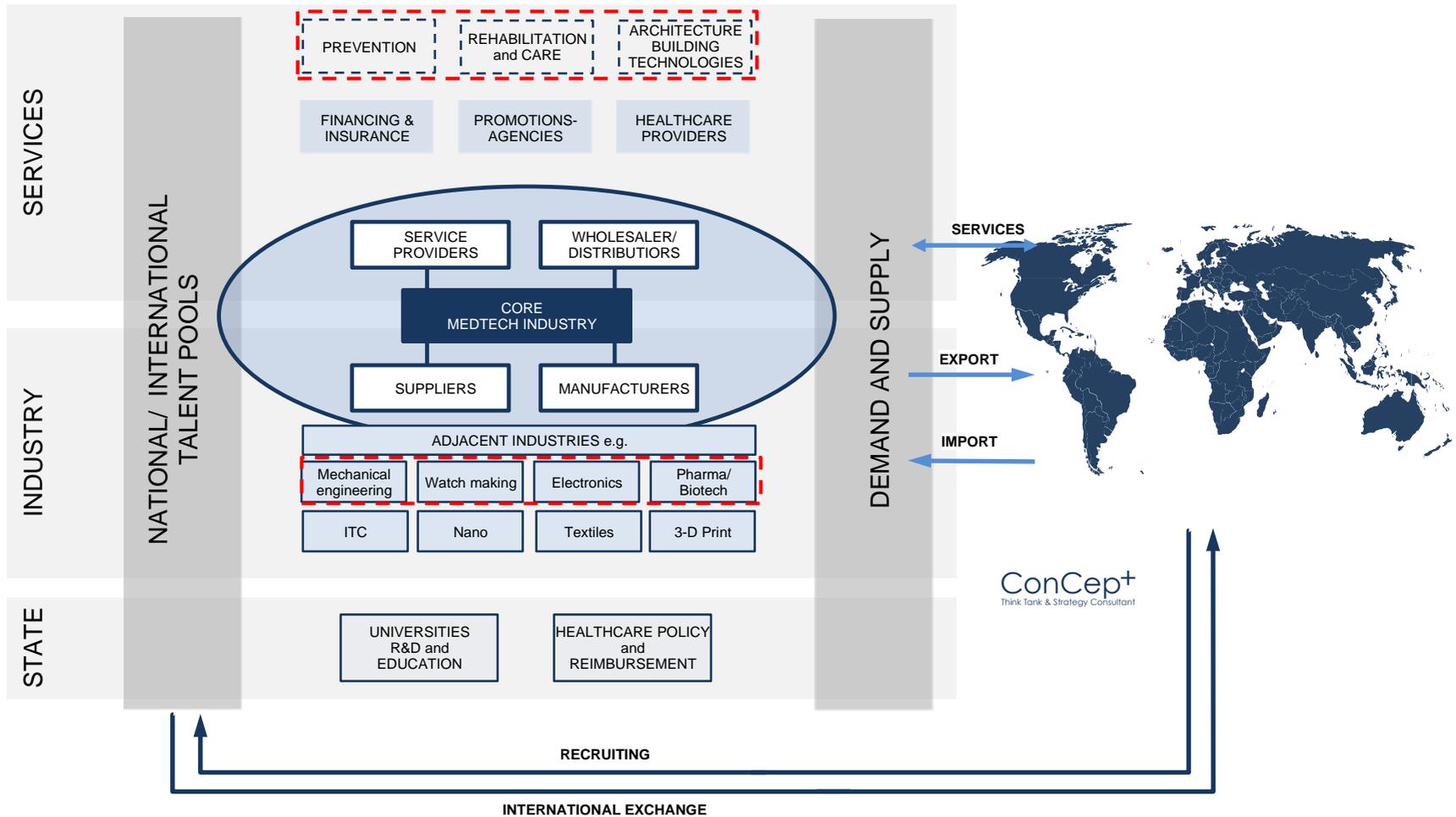
1) Data for the Netherlands and Belgium are overestimated as these countries serve as distribution centres for various Medtech companies ("Rotterdam" effect)



# 20 biggest medtech companies in Switzerland employ 43% of all Swiss medtech employees

Ranking	Company	Core manufacturing activities in Switzerland	Head-quarters	Employees in Switzerland 2015			Changes [%]	Global sales in CHF m			Changes [%]	R&D expenses in CHF m			Changes [%]	R&D/sales 2015 [%]
				2015	2014	2015		2014	2015	2014		2015	2014			
1	J&J Medical	Orthopedics, neurosurgery, cardiology, surgery	USA	6'000	6'000	0.0%	25'137	27'381	-8.2%	n.a.	1'574	n.a.	n.a.			
2	Roche Diagnostics	In-vitro diagnostics	CH	2'370	2'200	7.7%	10'814	10'766	6%*	1'200	1'037	15.7%	11.1%			
3	Sonova	Hearing systems	CH	1'238	1'200	3.2%	2'035	1'951	4.3%	150	126	19.0%	7.4%			
4	Medtronic	Cardiovascular, orthopedics, neuroscience	USA	1'000	1'000	0.0%	20'232	16'918	19.6%	1'640	1'469	11.6%	8.1%			
5	Zimmer Biomet	Orthopedics	USA	1'000	1'000	0.0%	5'989	4'649	28.8%	360	186	93.5%	6.0%			
6	Mettler Toledo	Precision instruments for laboratory	USA/CH	1'100	1'000	10.0%	2'392	2'473	-3.3%	110	n.a.	n.a.	4.6%			
7	Baxter	Medication delivery, renal therapy, bio science	USA	1'100	900	22.2%	15'564	16'599	-6.2%	965	n.a.	n.a.	6.2%			
8	B. Braun	Consumables for hospitals	GER	993	934	6.3%	6'600	6'528	1.1%	280	266	5.3%	4.2%			
9	Dentsply	Dental products	USA	900	900	0.0%	2'670	2'904	-8.1%	80	76	5.3%	3.0%			
10	Biotronik**	Cardiovascular diseases	GER	850	1'068	-20.4%	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
11	Straumann	Dental implants	CH	780	764	2.1%	780	710	9.9%	n.a.	36	n.a.	n.a.			
12	Stryker	Orthopaedics, neurotechnology and spine	USA	760	565	34.5%	9'932	9'625	3.2%	625	610	2.5%	6.3%			
13	Hamilton**	Laboratory automation, liquid handling	CH	750	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
14	Ypsomed	Injection systems	CH	738	712	3.7%	306	276	10.9%	28	24	16.7%	9.2%			
15	Smith & Nephew	Orthopedics and wound management	UK	470	410	14.6%	4'594	4'577	0.4%	221	233	-5.5%	4.8%			
16	Tecan	Laboratory instruments	CH	450	455	-1.1%	420	399	5.3%	30	40	-24.1%	7.1%			
17	Coltene	Dental equipment and consumables	CH	360	375	-4.0%	155	162	-4.3%	5	5	2.4%	3.5%			
18	Abbott	Diagnostics	USA	350	400	-12.5%	9'546	10'070	-5.2%	690	669	3.1%	7.2%			
19	Medela**	Breastpumps and medical vacuum solutions	CH	330	330	0.0%	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
20	Mathys Orthopaedic	Orthopedics	CH	321	300	7.0%	130	139	-6.5%	n.a.	n.a.	n.a.	n.a.			
<b>Total</b>				<b>21'860</b>	<b>20'513</b>	<b>6.6%</b>	<b>117'296</b>	<b>116'127</b>	<b>1.0%</b>	<b>6'384</b>	<b>6'351</b>	<b>0.5%</b>	<b>5.4%</b>			

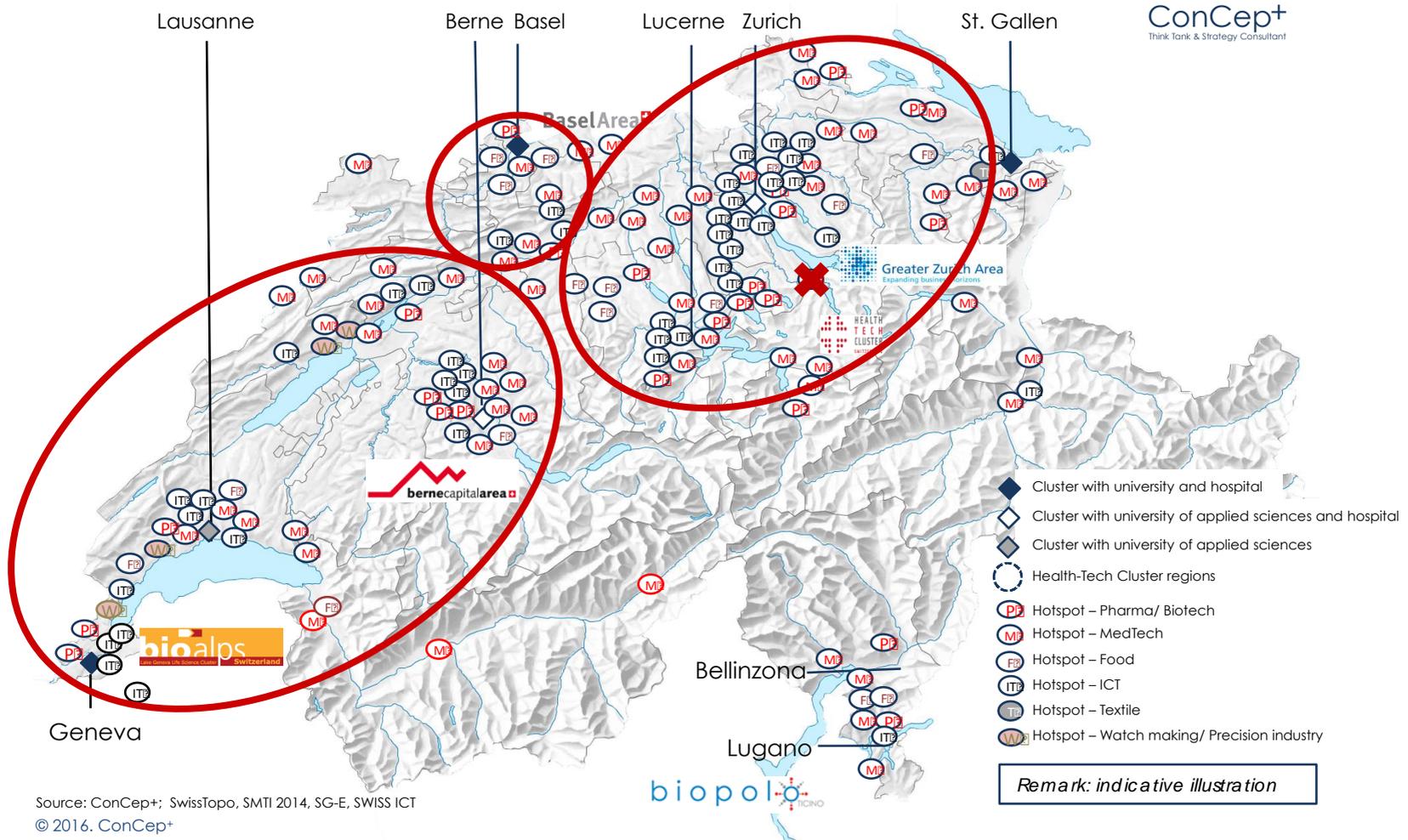
# The Swiss healthtech ecosystem



Source: Dümmler, Hofrichter, SMTI 2014; ConCep+

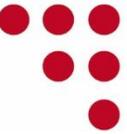
     New adjacent industries and services in support of holistic healthcare offering creation

# Healthtech hotspots in Switzerland



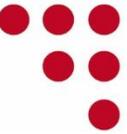
Source: ConCep+; SwissTopo, SMTI 2014, SG-E, SWISS ICT  
© 2016, ConCep+

Source: LIMEDex Index® – Swiss Medtech Country Report 2016



## Health Tech Cluster Switzerland (HTCS) – Profile

- Health Tech Cluster Switzerland is a network of health tech stakeholders
- Over 185 members
- Manufacturers, suppliers, institutions for research and training, service providers, investors and clinics



# Health Tech Cluster Switzerland – Industry network and value chain

## **manufacturers**

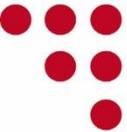
medical technology  
pharmaceutics  
biotechnology  
diagnostics

## **healthcare providers**

hospitals  
clinics  
doctors with a medical practice

## **other parties represented**

research  
suppliers  
specialized service providers  
dealers/distributors  
health insurance companies  
patients  
regulators  
associations

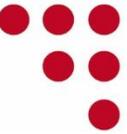


# HTCS – An international network

Cooperation partners are:

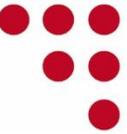
- BIOPRO Baden-Württemberg
- ecoplus. Niederösterreich
- Forum MedTech Pharma e.V.
- Gesundheitstechnologie-Cluster Business Upper Austria
- Health Tech Cluster Switzerland
- Human.technology Styria
- ARGE LISAVienna
- Medical Valley EMN e. V.
- Cluster Life Sciences Tirol
- TIS Techno Innovation Südtirol
- ZukunftsAgentur Brandenburg





## Health Tech Cluster Switzerland – Services for members

- Networking and market access
- Information and expertise
- Coaching and innovation support
- Studies and reports
- Communication and marketing



## Health Tech Cluster Switzerland – Next events

- Nov. 10<sup>th</sup> – Health Tech Start-Ups:  
Start-Up Day, Zurich
  
- Nov. 24<sup>th</sup> – Health Tech Experts  
Wearables, ISO 13485, Root D4