



European Diagnostic Manufacturers Association

PRESS RELEASE

12 January 2007

European IVD Market Estimates 2005

The latest estimates on the In Vitro Diagnostic (IVD) market in Europe, corresponding to the year 2005, are now available. The IVD sales in Europe represent less than 2% of the Total Healthcare Expenditure (i.e. around €20 per capita and per annum). Highly automated, IVD testing provides valuable data at low cost, thus allowing global healthcare savings while contributing to increase its quality. Increased testing will not significantly augment the costs of healthcare, but an appropriate spending on IVDs would certainly have a positive impact on healthcare.

In Vitro Diagnostics provide critical health information, **influencing more than 60% of the clinical decisions and contributing significantly to the quality of healthcare.** IVDs allow **earlier and more appropriate treatments**, thus helping to **shorten length of hospital stays**, rule out expensive treatments and **reduce costs** of treatment of complications. Moreover they assist to keep under **control the spread of infectious diseases** in the community.

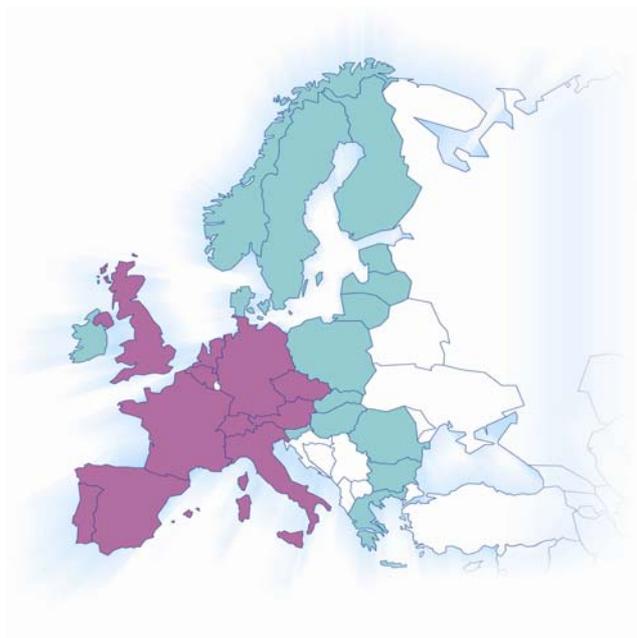
EDMA, the European Diagnostic Manufacturers Association publishes the data compiled from the **“European Diagnostic Market Statistics” (EDMS) programme**, where companies report invoiced sales of reagents, instruments and consumables used to perform tests to an independent auditor CIP, according to the EDMA Classification.

As more than 85% of the market is covered in major countries, **the accuracy of this data is high and represents a real asset for the IVD industry.** EDMA encourage all the companies and countries to participate to the EDMS programme, which is one of the best tools available to understand the trends in our industry and a basis for marketing decisions.

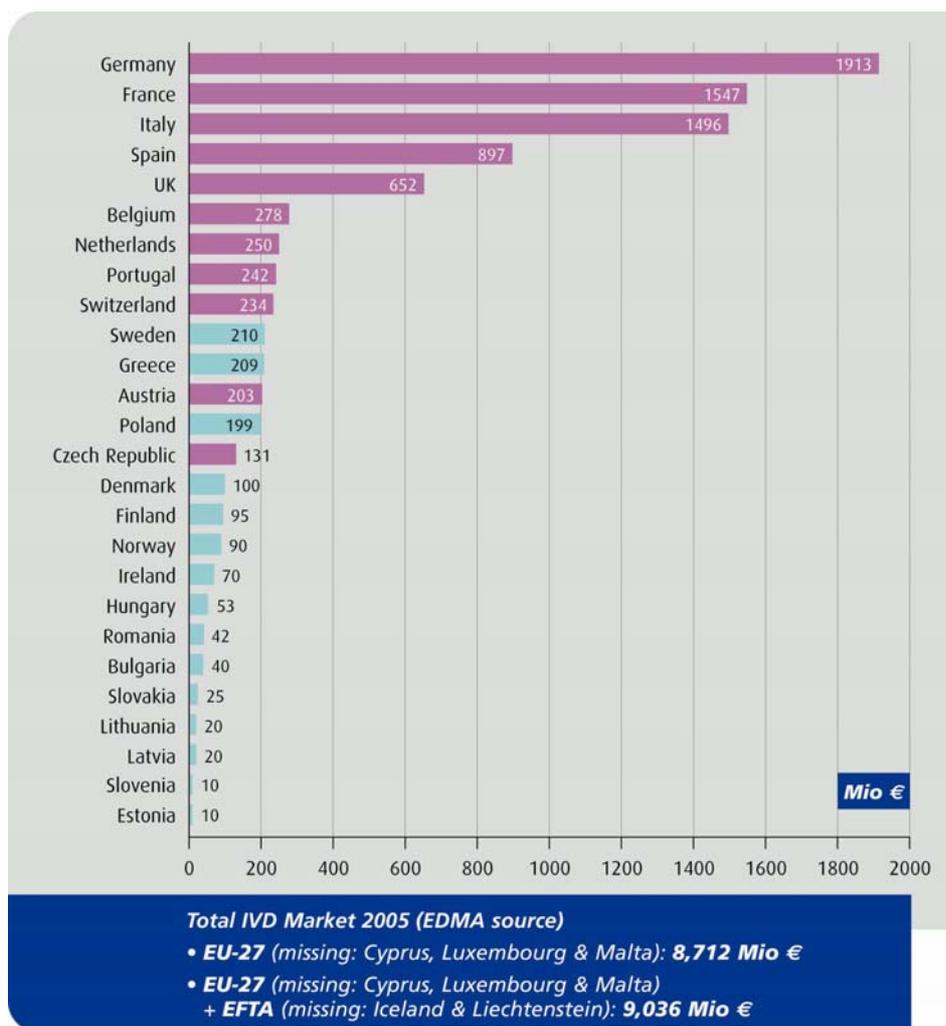
The amount spent on IVDs out of the Total Healthcare Expenditure is minimal. As stated in the following European market estimates for 2005, the average IVD industry sales represent less than 2% of the Total Healthcare Expenditure (i.e. around €20 per capita and per annum). **The value that In Vitro Diagnostics can contribute to increase the quality, safety, accuracy and savings of the European healthcare will only be achieved if there is a change in the way that resources are allocated** in order to take advantage of these opportunities.

IVD Market Estimates 2005

The results presented in the following table are based on *individual estimates made in 26 European countries*:



- 11 countries participating in the European Diagnostic Market Statistics (EDMS) programme: **Austria, Belgium, Czech Republic, France, Germany, Italy, Portugal, Spain, Switzerland, the Netherlands and UK.**
- The National Associations members of EDMA and the EDMA Market Research Task Force have estimated the IVD market in 15 other countries not participating in the EDMS programme: **Bulgaria, Denmark, Estonia, Finland, Greece, Hungary, Ireland, Latvia, Lithuania, Norway, Poland, Romania, Slovakia, Slovenia, and Sweden.**



Countries	Population	GDP	GDP per capita	THE	THE / capita	THE as % GDP	IVD mkt est. 2005	% IVD 05 / THE 04	IVD 05 / capita	
	Thousands	Mio €	€	Mio €	€	%	Mio €	%	€	
EU 15	OECD source 2004						EDMA source			
Germany	82,491	2,215,650	26,859	248,100	3,008	11.2	1,913	0.8	23.2	
France	60,200	1,648,369	27,382	173,878	2,888	10.5	1,547	0.9	25.7	
UK	59,834	1,703,386	28,469	140,691	2,351	8.3	652	0.5	10.9	
Italy	57,553	1,388,870	24,132	117,194	2,036	8.4	1,496	1.3	26.0	
Spain	42,692	837,316	19,613	67,777	1,588	8.1	897	1.3	21.0	
Netherlands	16,282	488,642	30,012	45,063	2,768	9.2	250	0.6	15.4	
Greece	11,062	167,169	15,112	16,743	1,514	10.0	209	1.2	18.9	
Portugal	10,509	135,079	12,854	13,512	1,286	10.0	242	1.8	23.0	
Belgium	10,421	288,089	27,645	27,788	2,667	9.6	278	1.0	26.7	
Sweden	8,994	277,337	30,836	25,161	2,798	9.1	210	0.8	23.3	
Austria	8,175	237,039	28,996	22,770	2,785	9.6	203	0.9	24.8	
Denmark	5,401	196,972	36,470	17,569	3,253	8.9	100	0.6	18.5	
Finland	5,228	149,725	28,639	11,240	2,150	7.5	95	0.8	18.2	
Ireland	4,044	188,622	46,642	13,425	3,320	7.1	70	0.5	17.3	
Luxembourg	452	27,056	59,858	2,170	4,801	8.0				
EU 27										
Poland	38,232	220,083	5,757	14,286	374	6.5	199	1.4	5.2	
Czech Republic	10,212	93,078	9,115	6,800	666	7.3	131	1.9	12.8	
Hungary	10,107	82,470	8,160	5,251	520	6.4	53	1.0	5.2	
Slovakia	5,382						25		4.6	
Bulgaria							40			
Estonia							10			
Latvia							20			
Lithuania							20			
Romania							42			
Slovenia							10			
Cyprus										
Malta										
EFTA										
Switzerland	7,390	288,071	38,981	33,414	4,521	11.6	234	0.7	31.7	
Norway	4,592	214,462	46,704	20,892	4,550	9.7	90	0.4	19.6	
Iceland	293	11,346	38,723	1,162	3,965	10.2				
Liechtenstein										
US	293,655	9,396,267	31,998	1,441,618	4,909	15.3				
Japan	127,435	3,691,737	28,970	291,332	2,286	7.9				

GDP = Gross Domestic Product; THE = Total Healthcare Expenditure (private and public)

In 2005, healthcare costs an EU citizen only €374 in Poland (lowest level), rising to €4521 in Switzerland, €4550 in Norway, and €4801 in Luxembourg (highest levels), whereas a US citizen spent €4909.

In Europe, less than 10% of GDP is spent on healthcare in most countries (more than 15% for USA), and the IVD sales represent less than 0.1% of the GDP in almost all the countries.

For more information, please visit [EDMA website](http://www.edma-ivd.be) or contact:
[Patricia de Buyt](mailto:Patricia.de.Buyt@edma-ivd.be), EDMA Market Research Manager (Tel. +32 2 777 02 73)