

Diagnostiikkasektori – suomalaista huippuosaamista

Bioteollisuus Forum

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Ann-Christine Sundell

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- ▶ >25 yrs experience in global lifescience
- ▶ Former president for the diagnostics business within Perkinelmer
 - > 400M\$ in revenue
 - > 1500 employees
 - 9 operational sites – US, Finland, China & India
 - Reached top 3 positions in several market segments
- ▶ Board professional & Advisor for lifescience (diagnostics) & healthcare companies



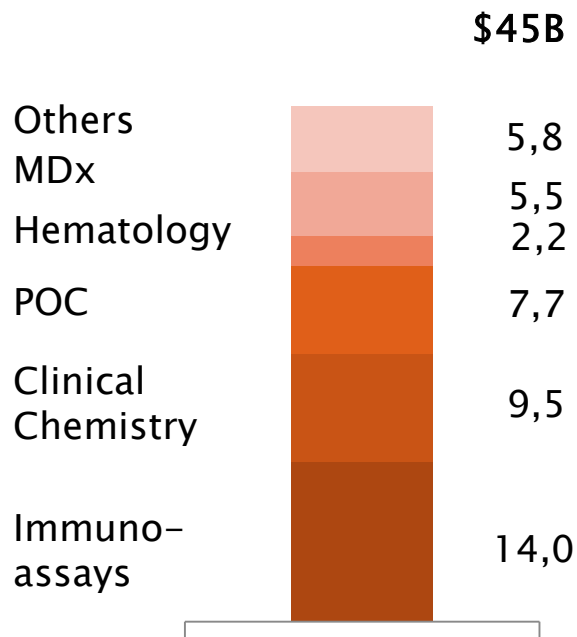
Kuva 2. Medisiinin laboratorio v. 1920. Lääkäri tutkii virtsan sedimenttiä.



*Kuva 1. Uuden klinikan eli Medisiinin laboratorio v. 1952. (ks. 1.1.)
Bild. 1. Nya Klinikens (Medicinens) laboratorium år 1952. (se 1.1.)
Fig. 1. Laboratory of the New Clinic in Helsinki in 1952 (see Ch. 1.1.)*

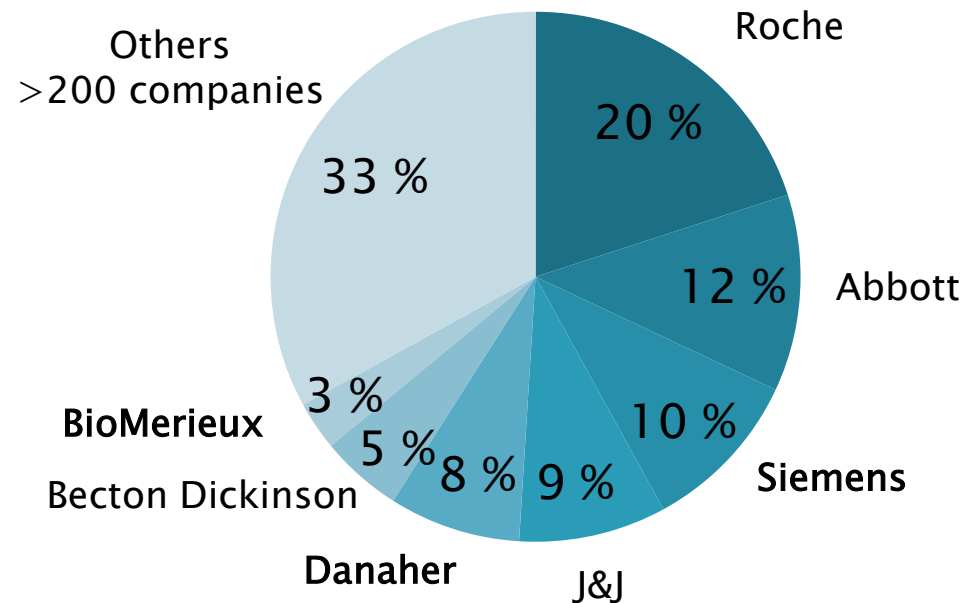
IVD market

Market size – B\$ (2010)



CAGR 5–6%

Market share (2011)

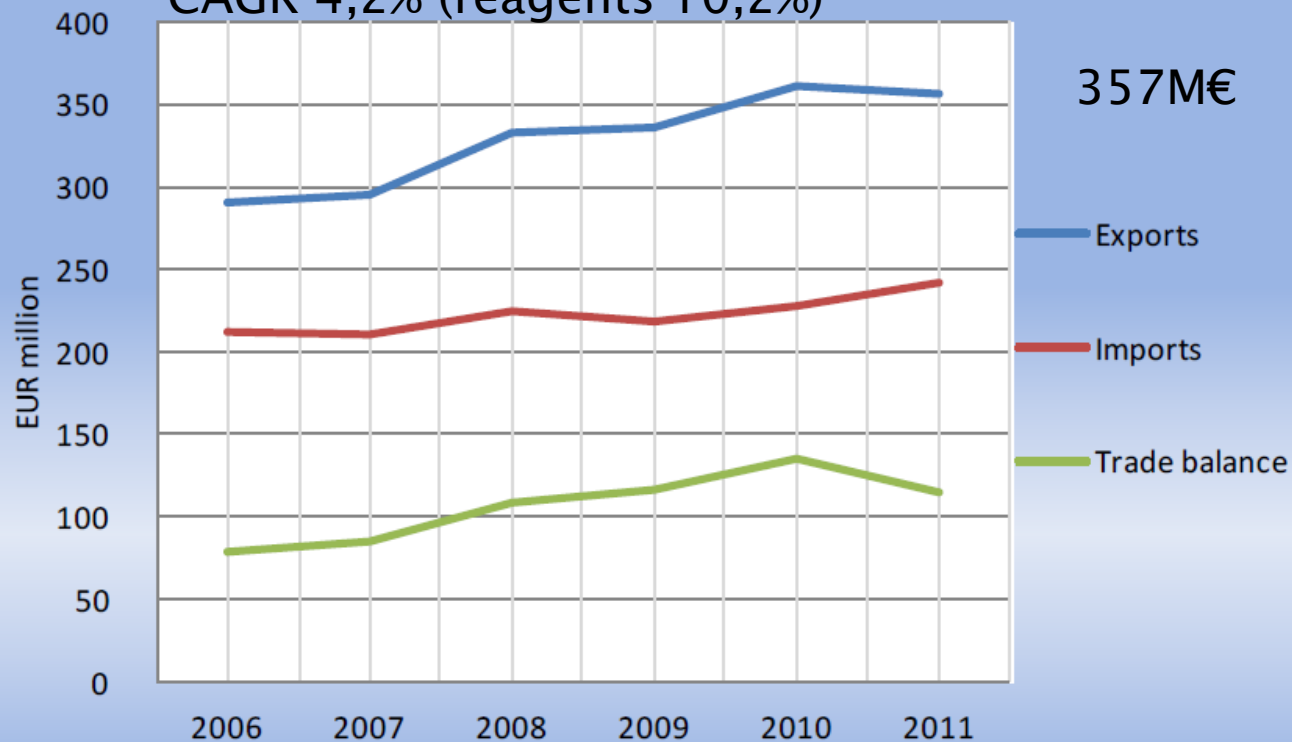


Consolidation will continue,
new players to enter the list e.g.
Hologic, Alere, Qiagen, Agilent, LifeTech

Finnish Diagnostic sector

Finland's trade in in-vitro diagnostics 2006-2011

CAGR 4,2% (reagents 10,2%)



Corresponds to
~640M\$¹⁾



1.3% of
Global market

Fastest growing
larger healthcare
Technology
segment in Finland

Trade surplus of
115M€ in 2011

¹⁾ Estimation end customer sales, per Dec'11

Finnish Diagnostic sector

SUBSIDIARIES

PUBLIC

PRIVATE



25 companies members
in FIVDIC (Finnish In Vitro
Diagnostics Cluster)



~ 2000 employees



Strength & Weakness

Made in Finland– examples

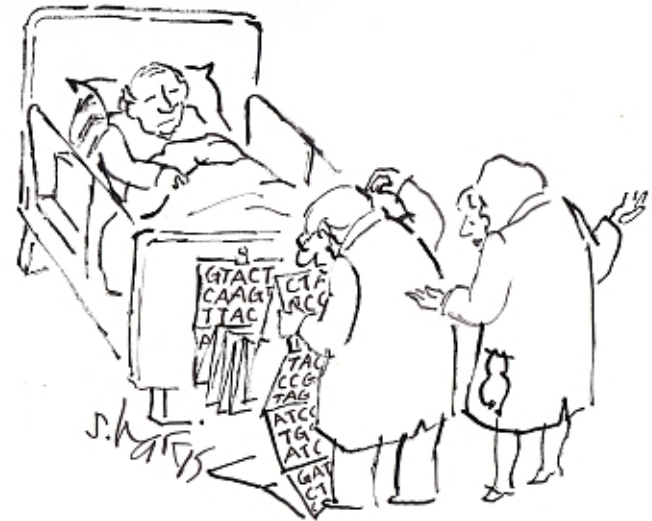
- ▶ #1 in supply of antibodies e.g. cardiac, thyroid and inflammation
- ▶ #1 in bloodspot based IVD
- ▶ #1 in ultra sensitive CRP POC
- ▶ #1 in MSMS IVD
- ▶ fPSA – prostate screening
- ▶ Lactose intolerance, Celiac
- ▶



What about the future?

- ▶ Better utilization of information and trends derived from laboratory tests combined with additional data e.g. demographics, nutrition
 - Personalized Medicine
 - Predictive Medicine
 - Informatics mgmt

We are well positioned due to our healthcare system with proper registers and historical data



What about the future?

- ▶ Aging population opens up new opportunities
 - Vitality Diagnostics
 - Home care/Care centers
 - Distance care

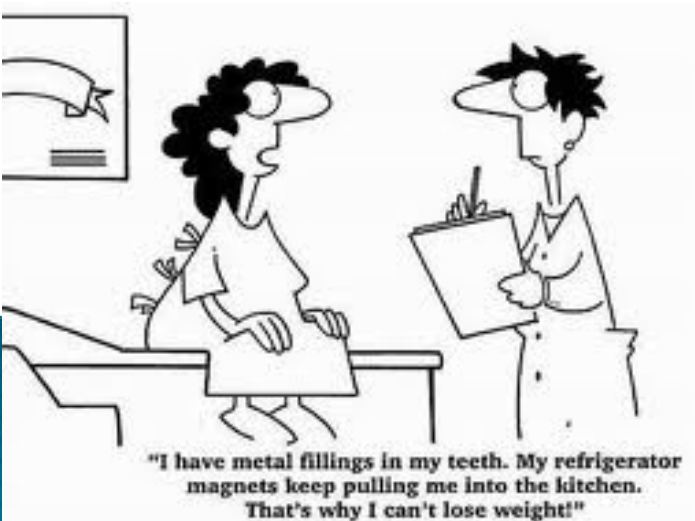
We have everything ; strong IT, mobile communications and detection/sensor knowledge



What about the future?

- ▶ Consumer awareness, Healthy Workforce, Life Style changes
 - Preventive Healthcare
 - Nutrition status
 - Wellness testing

Combination of nutrition, fitness and objective measures = diagnostic tests data, opens up a total new market. Prevention is part of our culture



Conclusions

Finnish Diagnostics sector

- ▶ Good technical base incl. regulatory and manufacturing discipline
- ▶ IVD is growing → room to play
- ▶ New trends → opens up new areas/niches

But...

- ▶ Go out of your offices
 - ▶ It is 1x technology and 3 x marketing
 - ▶ Do not invent the wheel again – collaborate
- 