

„We make global markets transparent“



anp management consulting GmbH

Selected Case Studies Healthcare

Essen, September 2022





Agenda

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Added value

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anp management consulting GmbH is a leading B2B marketing consultancy for decision-makers from industry, retail and services.



Peter Nagel

Founder & Managing Partner
Diploma in Economics,
Industrial Manager

Overview

- | | |
|---------------------------|--|
| ■ Our claim: | „We make global markets transparent“ |
| ■ Founded: | 2004 in Essen, Germany |
| ■ Team/Experts: | 82/360 |
| ■ Projects: | 850 in more than 62 countries |
| ■ Clients: | Global player, SMEs, Organizations, Services |
| ■ Global Experts/Partner: | 820 |

As market- / competitive intelligence and benchmarking specialists, we deliver "World Class Intelligence" and support our customers with global research, in-depth strategic analysis and expert interviews.


We have firmly aligned our business to those sectors and services where we know we can outperform the competition. We do not compromise on quality.

We offer the complete service portfolio of strategic marketing. For many years we have developed and perfected proprietary intelligence methods in order to obtain information that is not easily accessible.

As a result, we create sustainable added value for our customers by increasing their competitiveness and creating a valid basis so that the right strategic decisions can be made.

Consulting Approach - Overview

The global locations of our healthcare/pharma/medical devices analysts and experts guarantee “Local Knowledge” without cultural and linguistic barriers.

Selected topics Healthcare	ANP Expertise					
	Market Research	Market Intelligence	Competitive Intelligence	Market/Technical Benchmarking	M&A Due Diligence	Strategy & Foresight
Animal health						
Capsule machinery						
Drug against acromegaly						
Endoscopic ultrasound						
EPR						
Exoskeleton						
LFT						
MRI						
MS						
Medical compressed air generators						
Neurosurgical microscopy equipment						
Nutraceuticals						
Proteins & Gene therapies						
PCR						
Radiography						
RIA						
Robotic endoscopic surgery						
X-Ray						

90+ Countries & Regions:

- Western Europe
- Russia / Eastern Europe
- Balkan States
- NAFTA
- Latin- and South America
- Africa
- Asia
- UAE and Arabic States

● selected core locations

Market- and Competitive Intelligence: Veterinary MRI Market in the US

Client

- Global Player Medical Devices
- Business: Scientific instruments for research and industrial and applied analysis
- Position: Head of Market Intelligence

Content (excerpt)

- Value Chain Analysis: Pharmacy wholesale, specialty pharmacies, component manufacturers, authorized dealers, other distributors and re-sellers, MRI software, instrument and reagents end customers
 - Verification of total sales and margins for Reagents, Software and Instruments
 - Revenue analysis, margins gained, most common types of anesthesia, anesthesia purposes, most common services
- Competitor overview and analysis: Stage in the value chain, player category, no. of player, relevant player names, market shares
 - In-depth competitor profiles: Revenue, no. of employees, sales distribution by customer type / product, market share, production, investments, key figures per business group, prices & cost structure

Project Approach

- Desk research
- Phone interviews with targets and stakeholder
- Face-to-Face interviews with targets and stakeholder

Team

- Project Manager
- Pharma machinery experts
- Team size: 2

Added value

- Final assessment and input for Business Development
- Decision-making basis for future strategic actions

Competitive Intelligence: Machine User Research China and Japan

Client

- Pharma Machinery Company
- Business: Pharma machinery, services and equipment
- Position: Head of Sales

Content (excerpt)

- Market Intelligence Study for China and Japan
- Pharmaceutical:
 - Production locations of companies producing hard capsule products (machine number and name, dosage, capacity, production volume, background why using those machines)
 - Ranking of top 10 pharma companies
- Dietary supplement
 - Production locations of companies producing hard capsule products (machine number and name, dosage, capacity, production volume, background why using those machines)
 - Ranking of top 10 pharma companies

Project Approach

- Desk research
- Phone interviews with targets and stakeholder
- Face-to-Face interviews with targets and stakeholder

Team

- Project Manager
- Pharma machinery experts
- Team size: 4

Added value

- Final assessment and input for Business Development
- Decision-making basis for future strategic actions

Market Research: Identification of Diagnostic Laboratories in 6 countries

Client

- Global Player Medical Devices
- Business: Scientific instruments for research and industrial and applied analysis
- Position: Head of Business Development

Content (excerpt)

- Identification of diagnostic laboratories in 6 countries: Belgium, France, Italy, Norway, Poland, Sweden
- Identified services (yes/no) and technologies (yes/no) in addition to main contact and company data: Percentage of services diagnostic vs. non-diagnostic, Cardio-vascular, Nutrition, Oncology, COVID, Diabetes, Liver, Kidney, Neurology, Pneumology, ELISA/EIA, RIA, PCR, LFT, IAC, Other kits, NMR, Human MRI, Mass Spectrometry, Other technology
- Filled cells in Excel: 26.600
- Management Summary Powerpoint (45 pages)

Project Approach

- Desk research
- Phone interviews with targets and stakeholder
- Face-to-Face interviews with targets and stakeholder

Team

- Project Manager
- Medical devices experts and analysts
- Team size: 8

Added value

- Final assessment and input for Market Intelligence
- Decision-making basis for future sales activities

Competitive Intelligence: Pharma Machinery Study US and India

Client

- Capsule Machinery Company
- Business: Capsule and printing machinery
- Position: Head of Business Development

Content (excerpt)

- In-depth research to understand the US and Indian market for Capsule Filling Machines, Capsule Sealing Machines, Capsule/Tablet Checkweigher, Capsule/Tablet Inspection Machines and Capsule/Tablet Printing Machines
- Competitive Intelligence for eight machinery companies in the US / India:
 - Global Sales Results of each machine (Value and Volume) in past three years
 - Percentage of each application (Pharma vs. Dietary)
 - Major Customers in North America and India
 - Sales channel analysis and customers

Project Approach

- Desk research
- Phone interviews with targets and stakeholder
- Face-to-Face interviews with targets and stakeholder

Team

- Project Manager
- Pharma machinery experts
- Team size: 3

Added value

- Final assessment and input for Business Development
- Decision-making basis for future strategic actions

Competitive Intelligence: Inspection and track-and-trace systems for pharmaceutical applications

Client

- Client: Leading provider of track-and-trace and vision systems
- Business: Traceability technology and value chain digitalization
- Position: Head of Product Planning and Marketing

Content (excerpt)

- In-depth competitor investigation (3 targets located in EU, US and Asia):
 - Sales results, sales by region
 - Major customers, market position, strengths/weaknesses
 - Future sales revenue expectation and the reasons why
 - JV and partnerships for components, SW, integration for inspection systems
 - Needs of hyperspectral and multispectral imaging (dosage, processes)
 - Usage of Artificial Intelligence / Deep Learning for inspection
 - Challenges and future perspective for track-and-trace systems

Project Approach

- Desk research (15% of total efforts)
- Phone interviews with targets and stakeholder (85% of total efforts)

Team

- Project Manager
- Pharma machinery experts
- Team size: 3

Added value

- Transparent competitor profiles and therefore basis to adapt and develop a revised competitor strategy

Market Research: Identification of Commercial Analytical Service Providers in 4 countries

Client

- Global Player Medical Devices
- Business: Scientific instruments for research and industrial and applied analysis
- Position: Head of Market Intelligence

Content (excerpt)

- Identification of CASP companies in 4 countries: China, India, Germany and USA
- Identified services (yes/no) and technologies (yes/no) in addition to main contact and company data: Pharma/Biotech, Chemical industry, F&B, Nutraceuticals, Animal health, Small molecules, Biologics & Biosimilars, Proteins & Gene therapies, Polymes & Elastomers, Disinfectants & Biocides, Microbiology, Water, Cosmetics, Textiles & Fabrics, MS, NMR, EPR, MRI, PET, uCT
- Filled cells in Excel: 6278
- Management Summary Powerpoint (20 pages)

Project Approach

- Desk research
- Phone interviews with targets and stakeholder
- Face-to-Face interviews with targets and stakeholder

Team

- Project Manager
- Medical devices experts and analysts
- Team size: 4

Added value

- Final assessment and input for Market Intelligence
- Decision-making basis for future sales activities

Market Research: Identification of Commercial Analytical Service Providers in 13 countries (Follow-up Project)

Client

- Global Player Medical Devices
- Business: Scientific instruments for research and industrial and applied analysis
- Position: Head of Market Intelligence

Content (excerpt)

- Identification of CASP companies in 13 countries:
Belgium, Canada, Denmark, Finland, France, Italy, Netherlands, Norway, Poland, Spain, Sweden, Switzerland and United Kingdom
- Identified services (yes/no) and technologies (yes/no) in addition to main contact data:
Pharma/Biotech, Chemical industry, F&B, Nutraceuticals, Animal health, Small molecules, Biologics & Biosimilars, Proteins & Gene therapies, Polymes & Elastomers, Desinfectants & Biocides, Microbiology, Water, Cosmetics, Textiles & Fabrics, MS, NMR, EPR, MRI, PET, uCT
- Filled cells in Excel: 8450
- Management Summary Powerpoint (65 pages)

Project Approach

- Desk research
- Phone interviews with targets and stakeholder
- Face-to-Face interviews with targets and stakeholder

Team

- Project Manager
- Medical devices experts and analysts
- Team size: 12

Added value

- Final assessment and input for Market Intelligence
- Decision-making basis for future sales activities

Market Research: Identification of market potential for exoskeletons in the Industrial, Rehabilitation and Patient handling/care setting in seven countries

Client

- Global Player Medical Devices
- Business: Medical equipment and devices
- Position: Head of Business Development

Content (excerpt)

- Developing questionnaire with client for each of the three target groups
- Target countries: Germany, Italy, France, Spain, UK, Poland, Czech Republic
- Questions related to exoskeletons: Major applications, pricing, types of exoskeletons been offered, usage, pain points, scalability, key buying criteria, additional services, key selling points, decision maker, concerns for adoption, barriers and limitations, role and influence of unions in the purchasing decision and implementation, future development and trends

Project Approach

- 105 phone interviews with
 - industrial (major manufacturer chemicals, pharma and construction),
 - rehabilitation (centers for orthopaedic and neurological injuries) and
 - patient care respondents (hospitals, senior home facilities)

Team

- Project Manager
- Medical devices analysts
- Team size: 5

Added value

- Final assessment and input for Business Development so that future decisions can be prioritized
- Identification of key information so that the sales department is prepared for future target groups and negotiations
- Identification of competitor products

Market Intelligence: Market Analysis for X-ray and CT inspection systems

Client

- Global Player for medical equipment and measurement
- Business: Industrial measurement and inspection
- Position: Head of Product Marketing

Content (excerpt)

- Developing questionnaire for target groups
- Target: Client wanted to collect in-depth knowledge about the
 - Market: Trends, driver, market size and potential, market shares, future trends, foresight, success factors
 - Competitors: Strengths, weaknesses, USP, pricing, short profile with key data
- Industries covered: Semiconductors, Electronics, Metal Casting, Tires, E-Mobility, Aerospace, Additive Manufacturing
- Regions covered: China, Japan, South East Asia, India, USA, Canada, Mexico, Germany

Project Approach

- Desk research (10% of total effort)
- 80 phone interviews on site in local languages (90% of total effort) in order to find out opinions about future size/growth, competitors etc. (see Content)

Team

- Project Manager
- Medical devices analysts
- Team size: 6

Added value

- Definition of parameters and data for past growth in the radiosopic and CT inspection systems
- Build up of a market size/growth model for radiosopic and CT market
- Transparent landscape of industries and regions for business development

Selected project topics - Totally 24 projects in 2020-2022, targeting 45 companies in Healthcare / Medical Devices

Healthcare

- Endoscopic ultrasound equipment in the USA
- Medical imaging equipment in CEE
- Radiography equipment and consumables in DACH

Healthcare

- CT scan equipment in Midwest USA
- MRI scan equipment in Korea, Vietnam and Malaysia
- Ultrasound equipment in Canada

Healthcare

- Diagnostic equipment for cardio in Japan
- Endoscopy equipment in Russia
- Neurosurgical microscopy equipment in Germany

Healthcare

- Capsule endoscopy solutions in Brazil
- Endoscopic submucosal dissection market in Western Europe
- Robotic endoscopic surgery in the USA

Healthcare

- Robot-assisted surgery in Japan
- Veterinary MRI market France
- Drugs against acromegaly

Healthcare

- Medical compressed air generators
- Surgery devices US, Arab States
- Pharma inspection systems, T&T Italy & Canada

Selected project topics - Totally 24 projects in 2020-2022, targeting 45 companies in Healthcare / Medical Devices

Technologies

- Injection molding
- Extrusion
- Paint
- Printing / rapid prototyping
- Assembly
- Bending, grinding/polishing
- Heat treatment
- Machining zirconium oxide

Field of competence

- Parts and tooling costs
- Development costs
- Prototype costs
- Investment costs
- Cost / concept optimization
- Assembly costs
- Development of medical technology devices and machines



Main tools

- Excel-based calculation tool
- CAD
- CalCard
- Narrow
- Customer specific tools*
- 4cost
- CostData
- Siemens Team Center

Case Studies

- Product optimization and production relocation of a chryostat
- Optimization of packaging and its processes and approval
- Process optimization of a twin-screw extruder for the production of infusion tubing
- Development of a new syringe concept for a blood plasma syringe with which
- Focus on a significant reduction of scrappage in the filling and spraying process

Case Studies

- Development of a radiolucent skull clamp
- Development and establishment of a production for bone levers
- Process and cost optimization of the machining of titanium implants
- Cost-optimal development of a dental machine for dentures

Why ANP? – Added value for our clients

Your key to success: Our unique combination of seniority, seriousness and discretion, local resources, methodical intelligence know-how, proven technical expertise paired with excellent automotive expertise.

Why ANP?

- We work globally with local teams, proven methods and industry expertise
- We staff every project with the best experts, regardless of location
- We always act flexible, pragmatic, independent and neutral
- Seniority: Average professional experience of our analysts and consultants is 24 years
- We offer excellent value for money with no hidden costs
- We always guarantee the highest level of confidentiality
=> NDA, Fire-Wall-Principle



Added value for our clients

- Securing market decisions and investments
- Sustainable improvement in competitiveness
- Identification of strengths and weaknesses
- Anticipation of opportunities and risks
- Successful market positioning
- Identification of growth opportunities
- Transparent and comprehensible results
- A high level of detailed knowledge, which other market participants are usually unable to provide
- Cost and time savings

Do you have any questions or would
you like to discuss your project with us?

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