QIAGEN at a Glance
Customers rely on QIAGEN to address key challenges in the century of biology

WE HELP 500,000 CUSTOMERS

TO UNLOCK MOLECULAR INSIGHTS

OUR COMMITMENT:
TO ADVANCE MOLECULAR SCIENCE AND MEDICINE

>500

5,200

core products

employees
Strong leadership positions create opportunities in scientific and clinical applications

2019 sales by product portfolio

- ~11% Instruments (incl. services)
- ~89% Consumables and related revenues
- ~19% Pharma
- ~51% Life Sciences
- ~32% Academia / Applied Testing
- ~$1.53bn

2019 sales by customer class

- ~49% Molecular Diagnostics
- ~32% Academia / Applied Testing
- ~51% Life Sciences
- ~19% Pharma
- ~$1.53bn

CRISPR No. 1 in sample technologies

Microbiome No. 1 in sample technologies

Liquid biopsy No. 1 in sample technologies

Real-world patient data

Strengthening No. 1 position in genomic data informatics

Precision Medicine No. 1 in pharma CDx partnerships and FDA approvals

Latent TB detection No. 1 modern gold standard test
QIAGEN’s products target three major customer classes:

- ~32% Academic Research / Applied Testing
- ~49% Molecular Diagnostics
- ~19% Pharma

1984 EXPERIENCE
QIAGEN was founded in 1984 by scientists from the Heinrich-Heine University in Düsseldorf, Germany.

$1.53 bn SALES
QIAGEN’s adjusted net sales grew 4% CER in FY 2019.

5,200 EMPLOYEES
QIAGEN has been repeatedly recognized as an employer of choice with leading HR programs.

35 LOCATIONS
QIAGEN maintains subsidiaries in 20 countries and has more than 70 sales offices worldwide.

500,000 CUSTOMERS
QIAGEN serves a truly global customer base across various markets in life science and healthcare.

>2,340 PATENTS
QIAGEN invests ~10% of its sales into R&D to continuously drive innovation and growth.

500 PRODUCTS
QIAGEN markets a broad range of consumables and instruments for various customer needs.
Global presence with focus on the most attractive developed and emerging markets

2019 sales by geography

~$1.53bn

~47% Americas
~32% Europe / Middle East / Africa
~21% Asia-Pacific / Japan

Direct sales
Sales and marketing offices

Germantown Maryland
Americas

Venlo Netherlands
Global HQ

Hilden Germany
EMEA

Shanghai China
Asia-Pacific

Distribution partners in over 60 countries
35 subsidiaries in over 25 countries
Life Sciences: Providing differentiated technologies to enable scientific advancements

Market

- QIAGEN segment share: ~15%
- QIAGEN 2019 sales: $789 million
- Unique sample prep technologies
- Constantly innovating PCR / UNGS chemistry portfolio

2019 sales

- Instruments ~13%
- Asia-Pacific / Japan ~25%
- Consumables ~87%
- Americas ~45%
- EMEA ~30%
- EMEA ~5%
- Top 10 customers ~5%

Key products

Sample Technologies
- Most comprehensive portfolio of products for DNA / RNA collection, purification, stabilization and storage

PCR Assay Technologies
- Extensive enzyme portfolio and GeneGlobe portal for gene design and analysis, 2020 launch of complete dPCR portfolio

NGS Assay Technologies
- Best-in-class library prep technology integrated with NGS panel technology and bioinformatics for customer-specific solutions

Human Identification Testing
- Leading sample collection (FTA paper) and sample isolation products, complete workflows for all types of human identification and forensics

Innovation and customer access through Sample Technologies fuel new product growth across portfolio into MDx
Molecular Diagnostics: Full range of automation solutions from IVD to LDT and CDx

Market
- QIAGEN segment share: ~15%
- QIAGEN 2019 sales: $737 million
- Focus on high-growth, high-demand opportunities
- Complete range of solutions from PCR to NGS, LDT to IVD, monoplex to syndromic, and low to high throughput
- Full suite of automation from PCR to NGS

2019 sales
- Instruments ~10%
- Asia-Pacific / Japan ~17%
- Consumables ~90%
- Americas ~48%
- EMEA ~35%
- Top 10 customers ~18%

Key products

**Immune Response**
QuantiFERON technology: Expanding latent TB testing, CMV, Monitor for transplant, and new Lyme disease test in development

**Infectious Diseases**
New entrant in syndromic testing (QIAstat-Dx) and integrated PCR testing (NeuMoDx), building on QIAsymphony success

**Oncology and Precision Medicine**
Trusted partner with >25 pharma co-development partnerships, top supplier of FDA-approved molecular CDx kits

**LDT Workflow Solutions**
Leading provider of full range of LDT assay components, in particular for use on modular QIAsymphony processing system

CMV = Cytomegalovirus
Bioinformatics: Offering unique genomic data analysis and interpretation capabilities

Market
- QIAGEN segment share: ~20%
- 2019 sales: ~$83 million
- Industry leader in commercial bioinformatics solutions
- Offering solutions in combination with the QIAGEN “wet lab” products or as stand-alone solutions

![Market Diagram](image)

2019 sales
- Molecular Diagnostics (~9,000 users) ~20%
- Asia-Pacific / Japan ~20%
- EMEA ~25%
- Americas ~55%
- Life Sciences (~80,000 users) ~80%

Key products

**Discovery informatics**
- #1
- Curated research findings and largest collection of integrated scientific and clinical databases and interpretation solutions

**Clinical testing informatics**
- #1
- Knowledge bases of clinically relevant variants for hereditary and somatic assays with QCI (QIAGEN Clinical Insight) reporting

**Genomic-based content**
- #1
- Unique digital assets compiled over 20 years, including >1,000,000 patient tests analysed with QIAGEN cloud-based clinical solutions to date