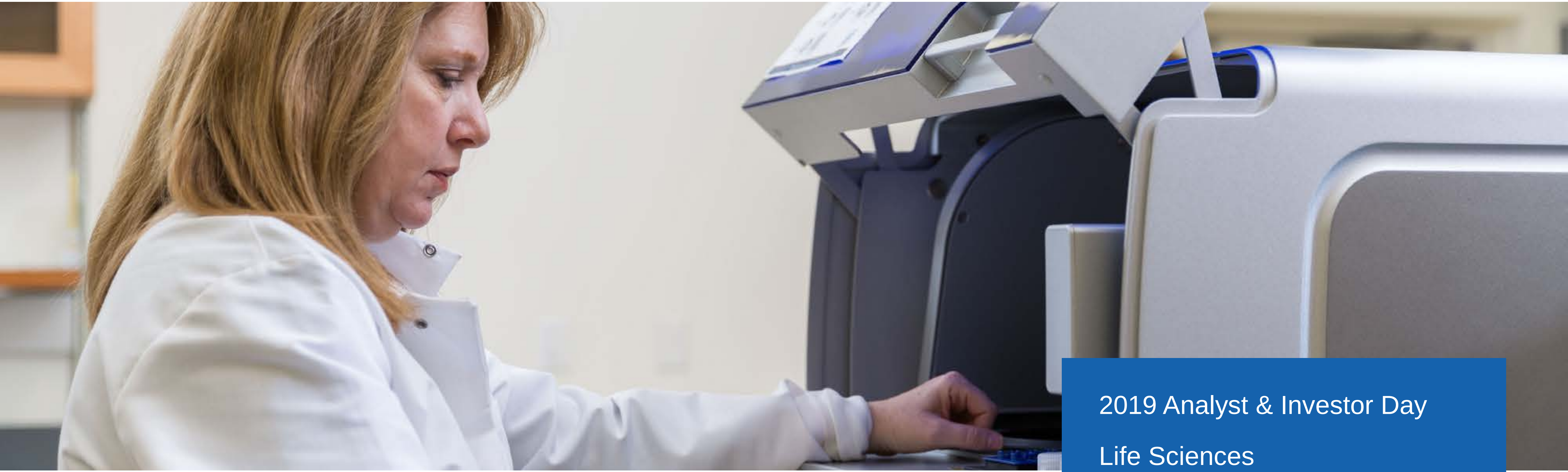

2019 Analyst & Investor Day

Life Sciences

Leveraging technology leadership to deliver on exciting opportunities

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Disclaimer

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Life Sciences offers highly attractive growth opportunities

Our customers

Academia

Discovery research

Pharma

Discovery

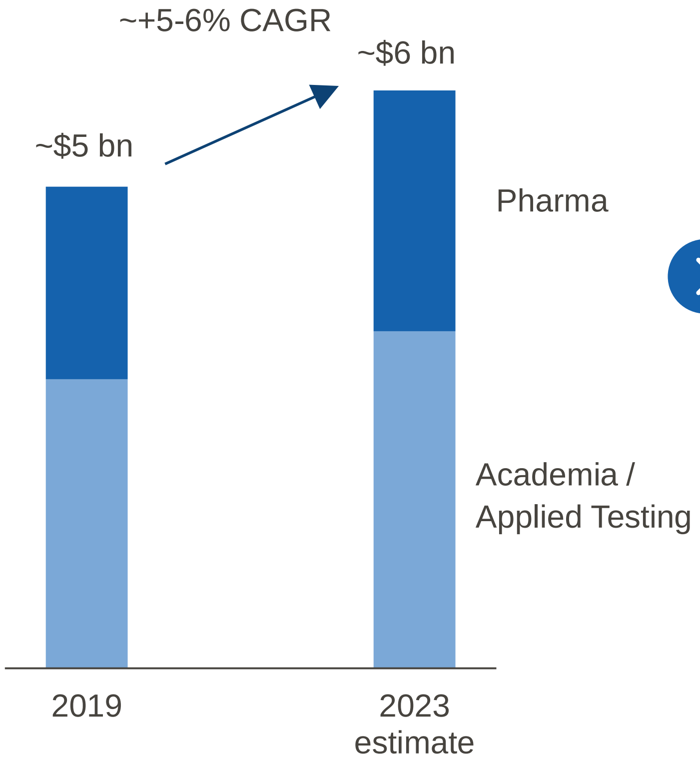
Development

Applied Testing

Human ID / Forensics

Total addressable market

QIAGEN market share: ~15%

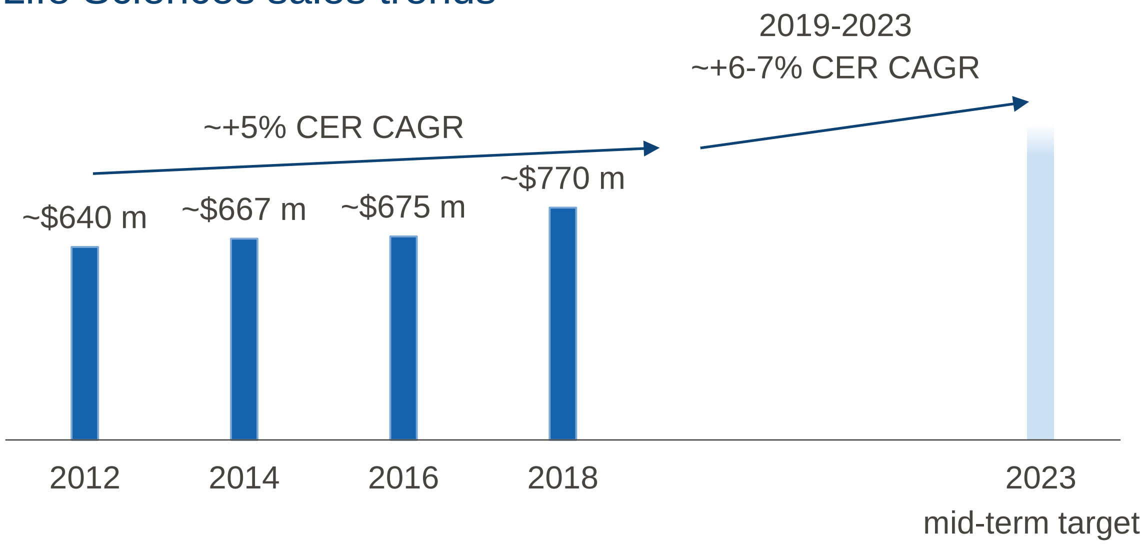


Key trends

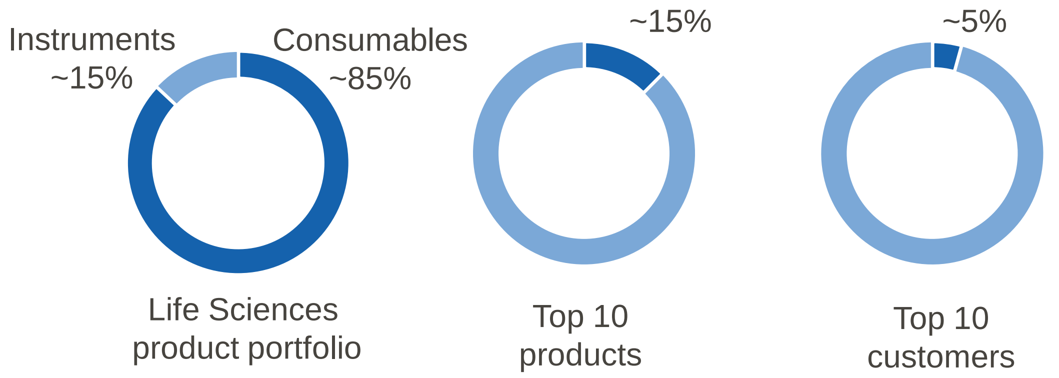
- Impressive breakthroughs in genomics
  NGS, dPCR, CRISPR, SynBio, Single cell
- Dissemination into many areas of science
  Human Cell Atlas, Mio EU Genome Alliance
- Explosion of scientific data
  Increasing output beyond imagination
- … and all starts with a biological sample
  Reliance on Sample & Assay Technologies

Leveraging QIAGEN's technology leadership to deliver on exciting opportunities

Life Sciences sales trends



2018 sales: Well-diversified portfolio and customer base



Sample Technologies

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

#1

PCR Assay Technologies

Strong enzyme and GeneGlobe portfolio for
gene design and analysis

Top 3

NGS Assay Technologies

Application-specific portfolio for sequencing
integrated with QIAGEN bioinformatics solutions

Top 3

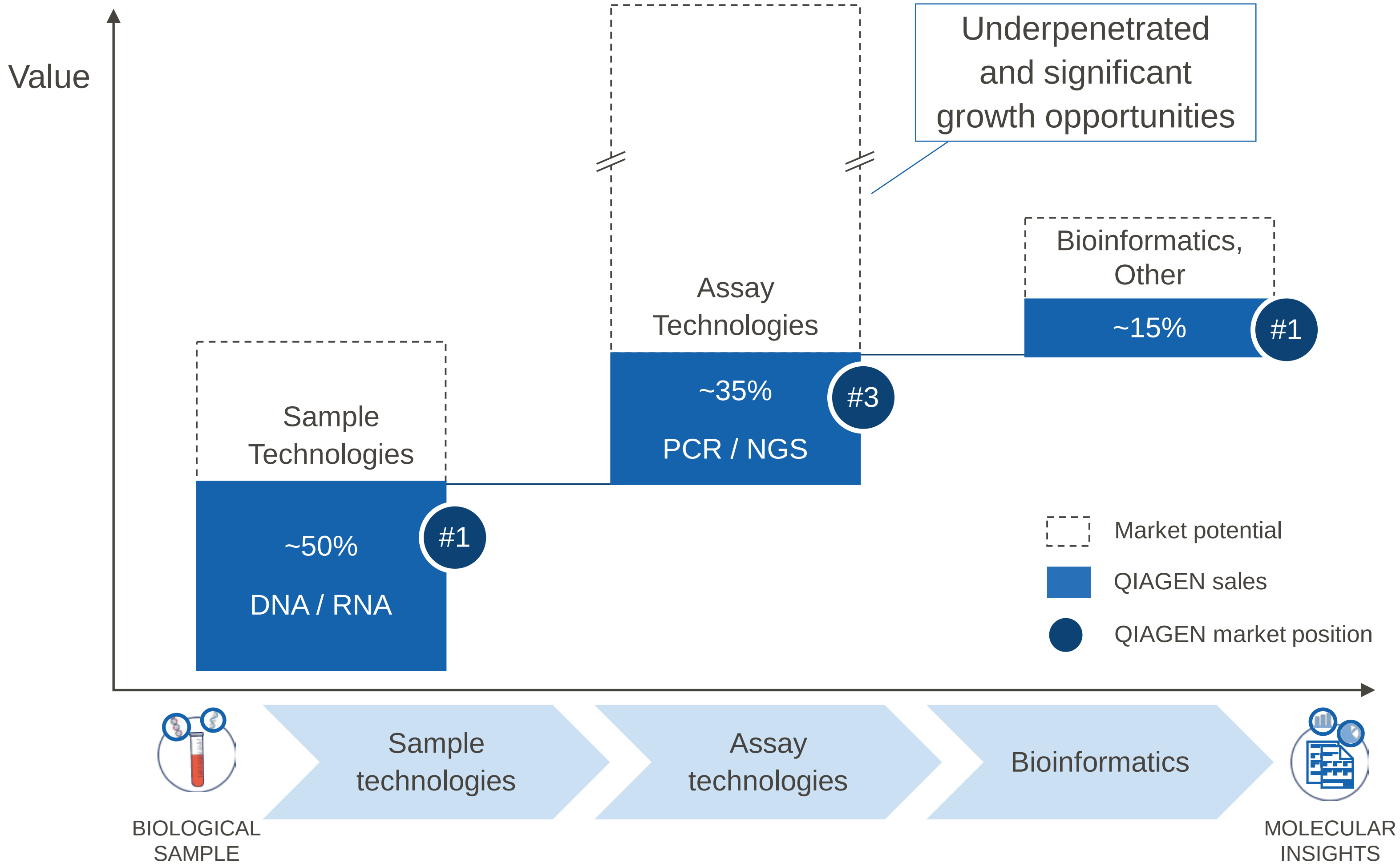
Human Identification Testing

Complete and integrated workflows for
all types of human identification and forensic testing

Top 2

Life Sciences: Building on the strength of our market-leading positions

2018 Life Sciences sales perspectives ($770 million)



Strategy: Deliver growth with new products and strong foundation in Sample Technologies

Exciting portfolio of novel solutions for Life Science research

Sample Technologies: Leverage leadership

Strengthening No. 1 position with opportunities in new high-value application areas

PCR Assay Technologies: Transform portfolio with digital PCR

Planning 2020 launch of digital PCR platforms with unlimited range of assays

NGS Assay Technologies: Support growth with customer-specific solutions

Integrating best-in-class NGS assays with best-in-class bioinformatics

Human Identification Testing: Expand product portfolio

Gaining market share and global presence with complete Sample to Insight offering

Sample Technologies: Many diverse and complex applications

Attractive end markets

- >1 million samples processed daily
- >$700 million market opportunity with +2-3% CER annual growth

Strategic focus

- Extend leadership with innovations in new application areas: Liquid biopsy, microbiome research, etc.

Where we play

- No. 1 market position, more than 500 Sample Tech products
- Full portfolio for sample collection, stabilization and purification

Value proposition

- ~3,000 automated protocols available for customers
- Known by almost all end-users for strong brand: 200,000 citations

Selected biological samples

Tissue	Stool
Cells	Saliva
Blood	Other body fluids
Serum	Bone
Plasma	Plants
Urine	Soil

Input demands	Processing	Target analytes
Low / high-volume Low-quantity Tubes / plates	Manual	Genomic DNA Plasmid DNA cfDNA
Output demands Low-quantity High-quantity Tubes / plates	Automated Low- to high-throughput	mRNA, rRNA, miRNA Proteins Circ. tumor cells

Applications

Cloning	Sequencing / NGS
DNA amplification	qPCR / dPCR
Arrays	Liquid biopsy
Gene editing	Micobiome
Epigenetic	Gene silencing
Cellular analysis	Proteomics

QIAGEN Sample Technologies found in essentially every laboratory worldwide

From young scientists to Nobel laureates

Strong market position

- ~100% brand awareness
- ~70-80% of end-user use QIAGEN once per year
- >60% market share in many application areas
- >100 million purifications per year with QIAGEN

Selected areas of science:

- Molecular biology
- Microbiology
- Genetics
- Cell biology
- Immunology
- Cancer biology
- Developmental biology

PCR Assay Technologies: Transformation with 2020 launch of disruptive dPCR systems

Attractive end markets

- ~$2.5 billion quantitative PCR (qPCR) market in Life Sciences
- ~$200 million digital PCR (dPCR) opportunity

Strategic focus

- Transform an underperforming business to a growth driver
- Launch dPCR systems(1) portfolio with millions of assays
- Convert qPCR customers to new digital PCR platform

Where we play

- Competitive PCR enzymes and instruments
- Leading gene-design and analysis platform (GeneGlobe)

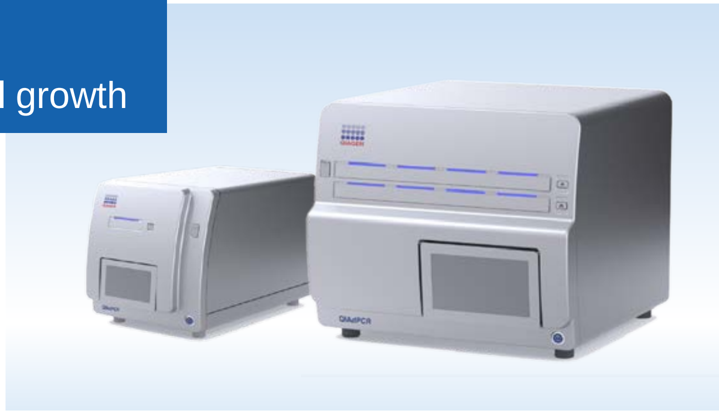
Value proposition

- Disruptive digital PCR systems being prepared for launch in 2020
- Highest-sensitivity dPCR combined with ease of use

Digital PCR market

~$200 million(2)

~+15-20% CER annual growth



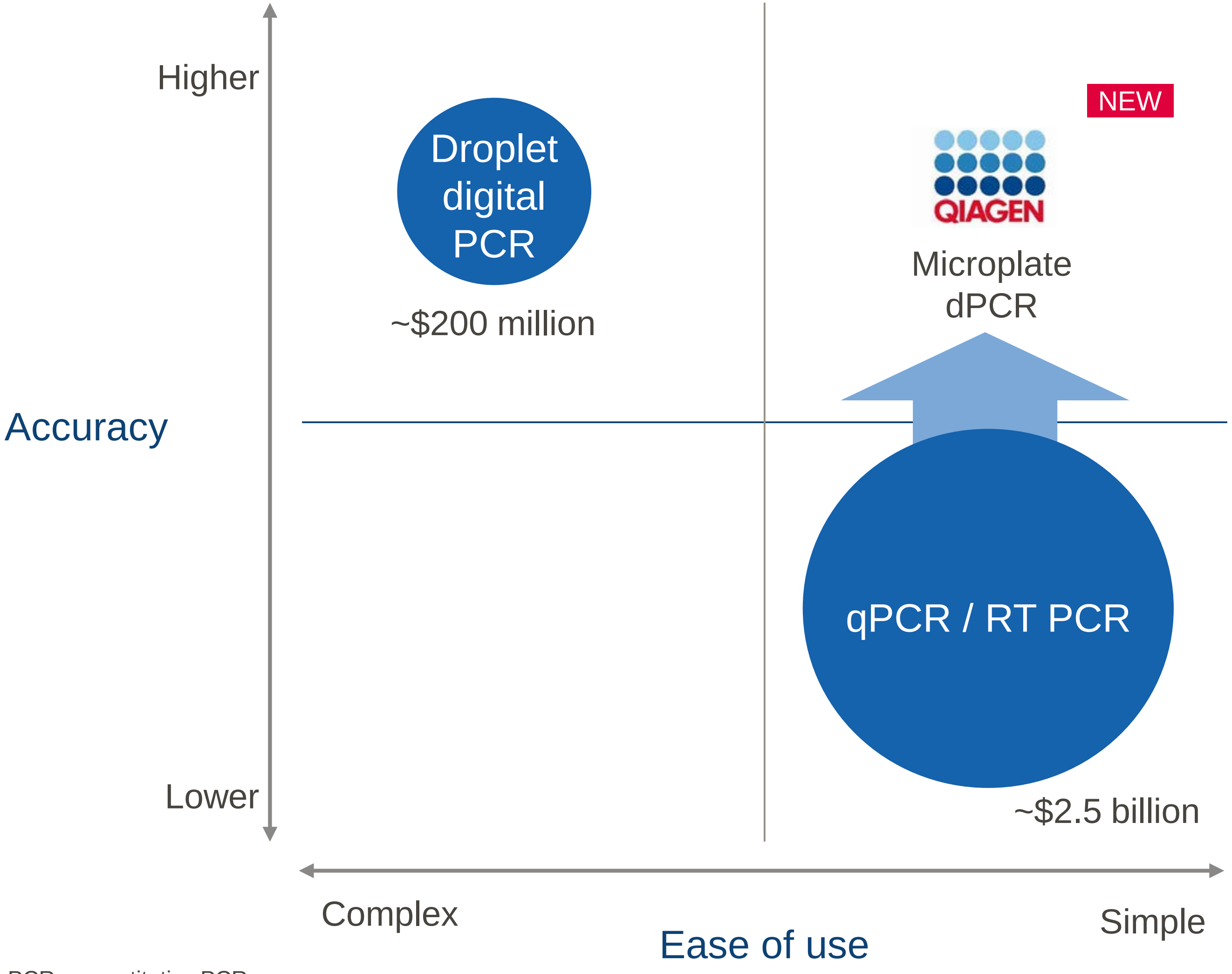
Quantitative PCR market

~$2.5 billion(2)

~+1-2% CER annual growth

(1) QIAGEN acquired digital PCR assets from Formulatrix, Inc. in early 2019 (2) 2019 market estimates.

QIAGEN's digital PCR system: High sensitivity combined with better ease of use



RT PCR – Real-time PCR qPCR – quantitative PCR

Case study: Next generation of dPCR systems with a million pre-designed assays

- Throughput options
- Quicker time to result
- Higher multiplex capabilities
- Less hands-on time
- Lower cost of entry

Specifications	QIAGEN Microplate dPCR	Incumbent ddPCR system
Sample throughput:	Low- to ultra high-throughput	Mid-throughput
Time per run	~1.5 hours	~5 hours
Samples per 8-hour shift	120-384	96
Multiplexing capability	2- or 5-plex	2-plex
Walk-away workflow	Yes	No
Fully integrated instrument	Yes	No
Cost competitive with qPCR	Yes	No

NGS: Best-in-class consumables powered by best-in-class bioinformatics

Attractive end markets

- >$800 million market opportunity with >15% CER annual growth

Strategic focus

- Launch of novel cutting-edge applications
- Increase market penetration

Where we play

- Sample technology for DNA / RNA
- Assay technologies for library prep and NGS panels
- Bioinformatics for data analysis and interpretation

Value proposition

- Top NGS chemistries integrated with best-in-class bioinformatics

Sample collection and stabilization → DNA/RNA purification → Target enrichment and QC → Library preparation and QC → Sequencing → Analysis and interpretation

QIAseq Universal NGS solutions
Compatible with any sequencing platform

QIAGEN Bioinformatics solutions
Compatible with any sequencing data

Human Identification / Forensics: Gain market share with comprehensive workflow

Attractive end markets

- ~$300 million total addressable market for QIAGEN
- High barriers to entry

Strategic focus

- Offering sample collection, purification, new STR[1] assays, NGS
- Gaining market share through offering a complete portfolio

Where we play

- Human Identification and Forensics: law enforcement, immigration
- Leader in sample technologies, top player with new assay portfolio

Value proposition

- Ability to offer complete Sample to Insight HID workflows
- NGS as a future technology

Selected QIAGEN Human Identification customers

ICMP (The Hague, Holland)

GeneReader NGS System
used to identify genocide
victims from Balkans conflict

Dr. Sherree Hughes-Stamm:

QIAGEN
Young Investigator Ambassador

Member of the
Texas Forensic Science Commission

(1) STR – Short Tandem Repeat

Summary

- Market positions to create value in ongoing genomics revolution
- Access to any customer in the Life Sciences research markets
- Several differentiated drivers in place to accelerate growth
- Exciting new portfolio of novel innovation in trending applications