



PEAKZONE



HealthTech REPORT | VENTURE TRENDS

Lorenz Hartung | Elias Maier | Stine-Luise Müller | Julian Baumgärtner

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HealthTech Venture Report


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About PEAKZONE

Our Venture Experts

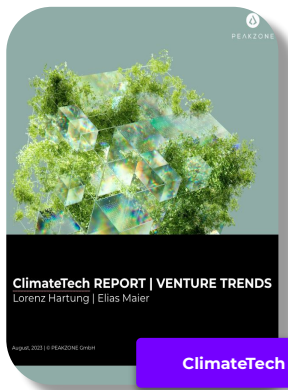


 **Lorenz Hartung**
CEO



 **Elias Maier**
Chief of Staff

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INDUSTRY OVERVIEW

Market Size & CAGR
Status Quo of HealthTech
HealthTech Clusters
Key Trends & Drivers
Corporate Leaders

The global digital health market is experiencing a significant growth of 18% between 2017 - 2027



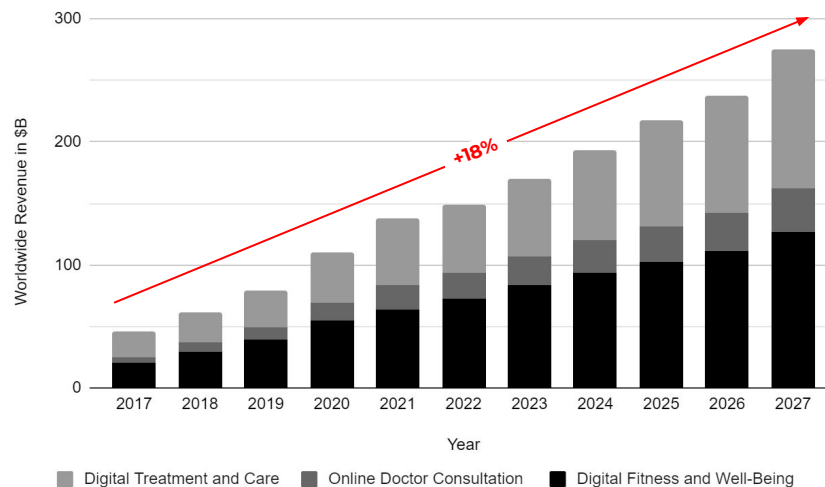
Digital Health generated \$110.70B in 2022 worldwide



The global Digital Health market is expected to grow at a CAGR of 18% (2022-2027).

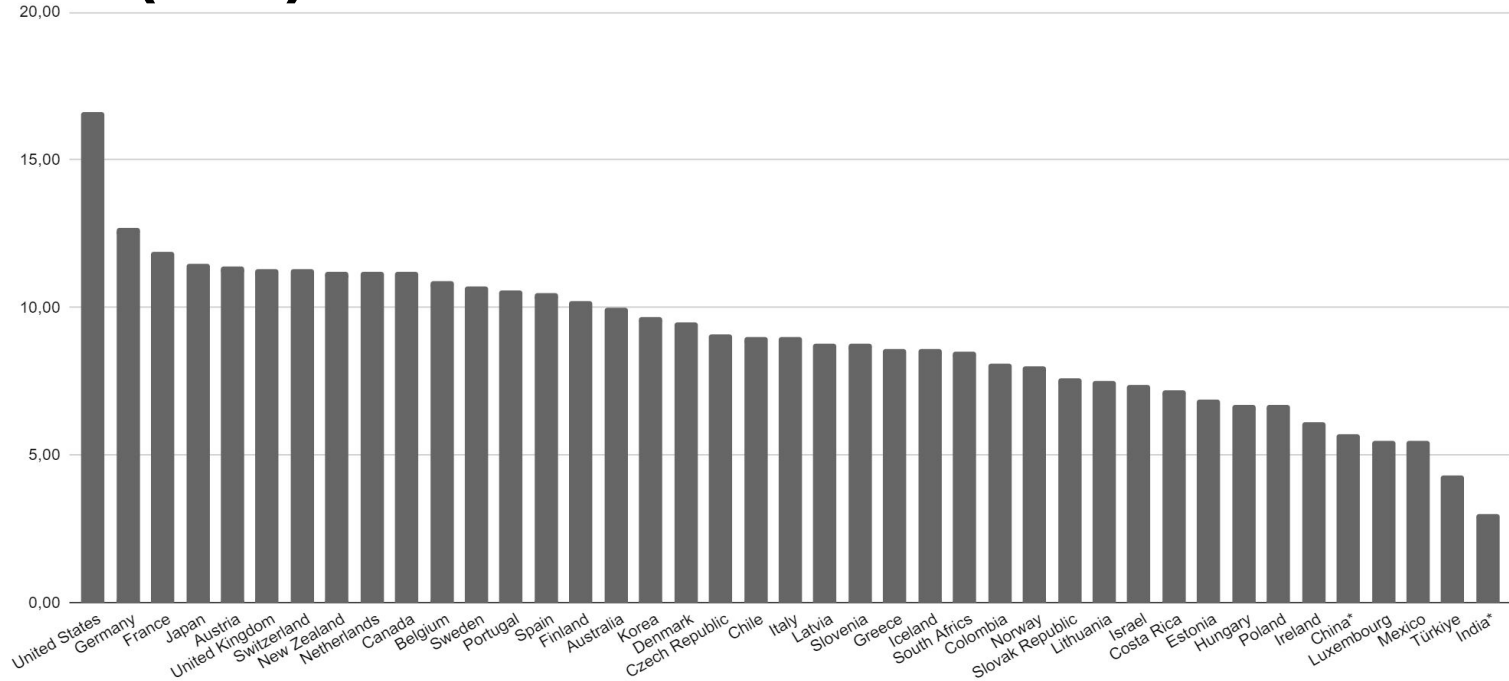
The global digital health market is experiencing a significant growth due to the growing demand for innovative health solutions.

Global Digital Health Revenue in \$ billion



The global digital health market consists of three main segments; digital treatment and care, online doctor consultation and digital fitness and well-being

Health expenditure as a percentage of gross domestic product (GDP) in selected countries in 2022



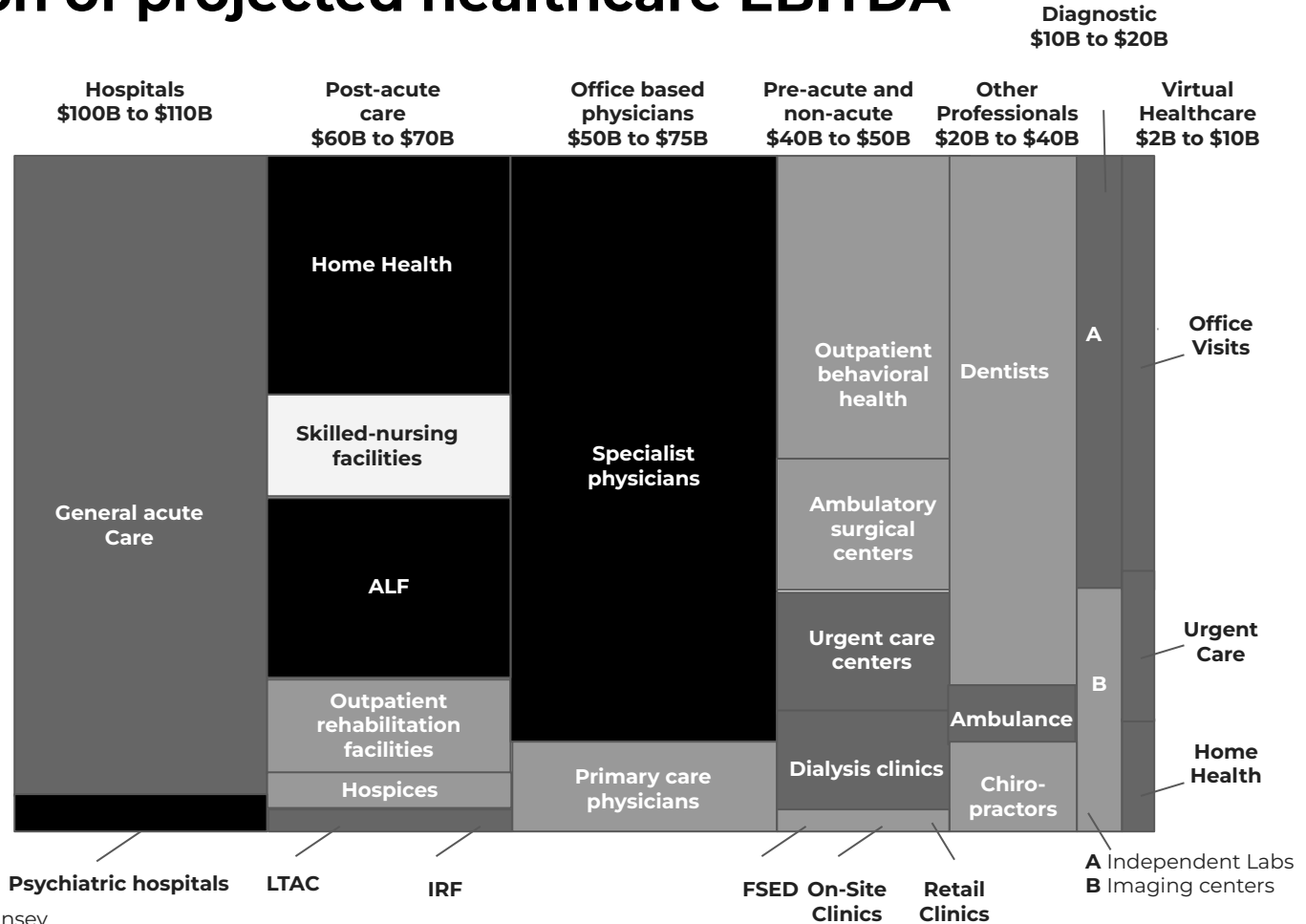
High health expenditure as a percentage of GDP, as in the USA, Germany, and France can mainly be explained due to well-established healthcare systems, higher living standards, expensive pharmaceuticals, an aging population, and a cultural emphasis on healthcare, while Turkey, Mexico and India have lower health expenditure as a percentage of GDP due to differences in healthcare infrastructure, economic development and healthcare system efficiency.

STATUS QUO



- The **global healthcare technology market is on an upward trajectory, with projected growth from \$371.4 billion in 2022 to \$439.5 billion in 2023**, reflecting a remarkable **compound annual growth rate (CAGR) of over 18%**.
- Despite economic disruptions related to the Russia-Ukraine conflict and the lingering impact of the COVID-19 pandemic, the health tech market is **expected to reach \$852.2 billion by 2027, maintaining an 18% CAGR**.
- In **2022, North America established itself as the dominant region in the healthcare technology market, closely followed by the Asia-Pacific region**, which is set to experience significant growth.

Distribution of projected healthcare EBITDA*



*as in the USA 2025, source: McKinsey

Eight Cluster define the HealthTech innovation landscape



1

Apps & Services

- Fitness & Well-Being Apps
- Patient Education Platforms
- Practice Management Software
- Medical Software Platforms
- Clinical Data Analysis



2

AI in Healthcare

- AI-enabled Medical Devices
- Medical Software Platforms
- Clinical Data Analysis
- AI Technology Application



3

VR & AR in Healthcare

- VR-based Therapy
- Augmented Reality Staff Training
- VR-based Kinesiology
- Surgical Procedures



4

Telemedicine & Remote Patient Monitoring

- Video Consultations & Connected Apps
- Teletherapy and -rehabilitation
- Wearable Devices & Home Monitoring Kits
- Telepharmacy

Diagnostics and Screening

- Laboratory Diagnostics
- Imaging Diagnostics
- Point-of-Care Testing
- Molecular Diagnostics

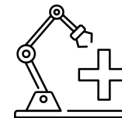
5



Robotics and Automation

- Surgical Robots
- Rehabilitation Robots
- Assistive Robots for the Elderly & Disabled
- Prosthetics & Orthotics Robots

6



Internet of Medical Things

- Medical-Grade Wearables
- Remote Patient Monitoring
- Personal Emergency Response Systems (PERS)
- Data Management Platforms

7



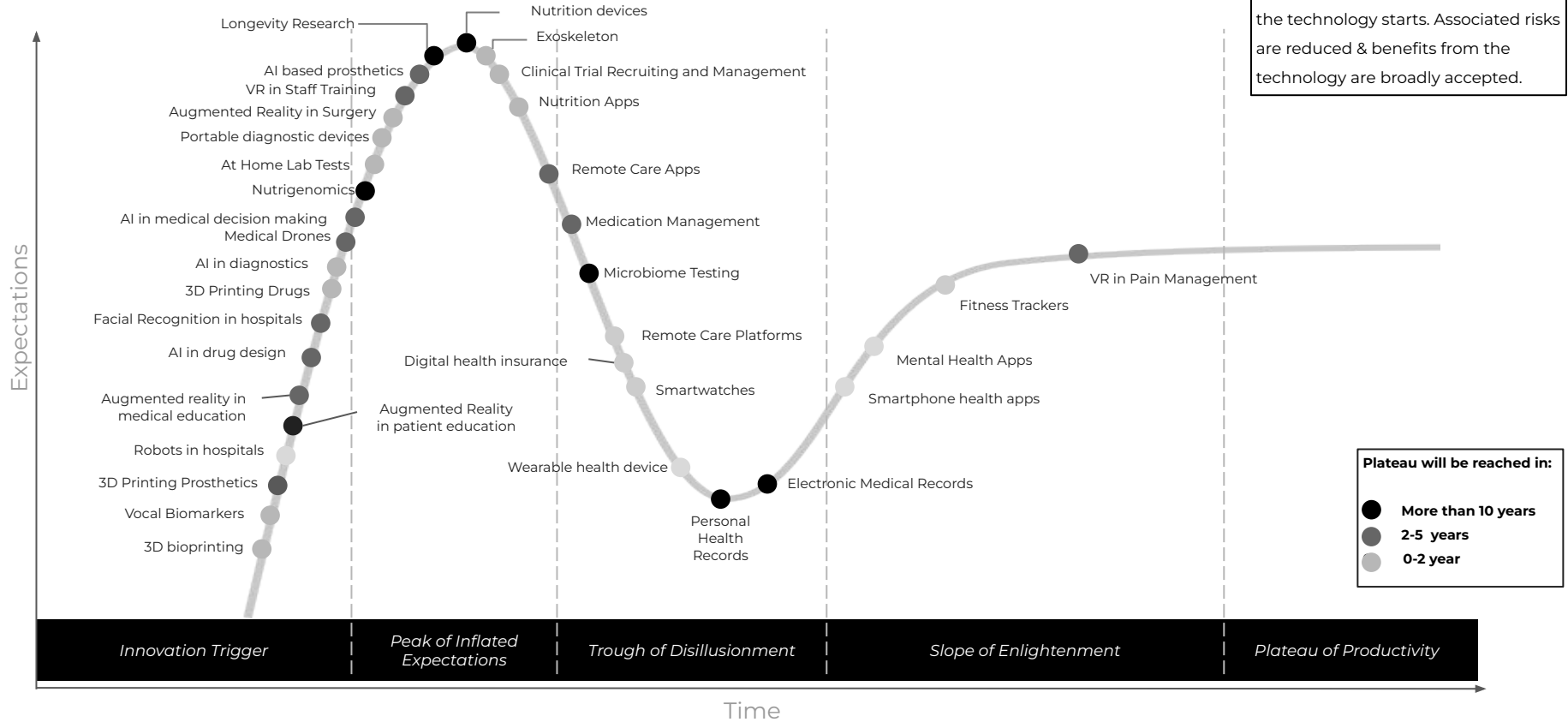
Organ Care Tech & Bioprinting

- Stem Cell Bioprinting
- Scaffolding-Based Bioprinting
- Organ-on-a-Chip
- Precision & Personalization

8



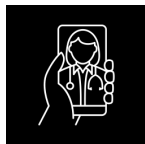
The current State of Innovation: HealthTech in the Gartner Hype Cycle 2023



Five Key Trends driving the HealthTech Industry in 2023

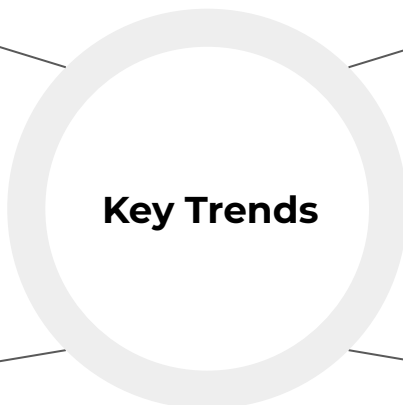
Remote Patient Monitoring

Remote Patient Monitoring has emerged as a **rapidly growing trend** in healthcare. These systems facilitate the **collection** and **analysis of patient data** **without** the need for **physical hospital visits**.



Virtual & Augmented Reality

VR in healthcare is growing, serving four main purposes. It's used for **staff training**, **aiding surgeons** in simulations to reduce surgery risks, helping individuals with **developmental disorders** and **phobias adapt to reality**, and **enhancing therapy**, with programs like Psious assisting individuals in conquering fears.



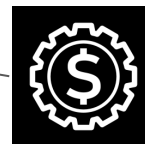
Telemedicine

Telemedicine is on the rise, with applications in **acute care** and **chronic disease management**. It offers cost-effective diagnosis and treatment, particularly in areas like cardiology.



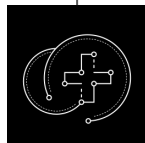
FinTech Integration

Integrating FinTech in healthcare **streamlines services**, reduces costs, and **improves data sharing**, benefiting healthcare teams and patients.



Artificial Intelligence

The field of Artificial Intelligence (AI) in healthcare entails the utilization of machines to mimic human cognition, with the primary objective of **analyzing medical data** to **predict specific outcomes**.



Leading companies in the health industry are significantly increasing their investments in health innovations



- Novartis is a multinational pharmaceutical and life sciences company, has pursued a growth strategy through a series of acquisitions across various sectors. These acquisitions have been part of the company's broader strategy to expand its presence in multiple areas of the healthcare and technology industries.
- **Startup Acquisition:** DtX Pharma (2023), Chinook Therapeutics (2023)



- Stryker is a Fortune 500 company that focuses on providing innovative medical technologies to improve and enhance healthcare outcomes for patients and medical professionals. The company operates in several key segments, including Orthopaedics and MedSurg.
- **Startup Acquisitions:** HyperBranch MedTech (2018), Cerus Endovascular (2023)



- Johnson & Johnson conducts pharmaceutical research and development, manufactures medical devices, produces consumer healthcare products, and prioritizes sustainability and social responsibility.
- **Startup Acquisition:** Abiomed (2022), Momenta (2020), Taris Biomedical (2019)

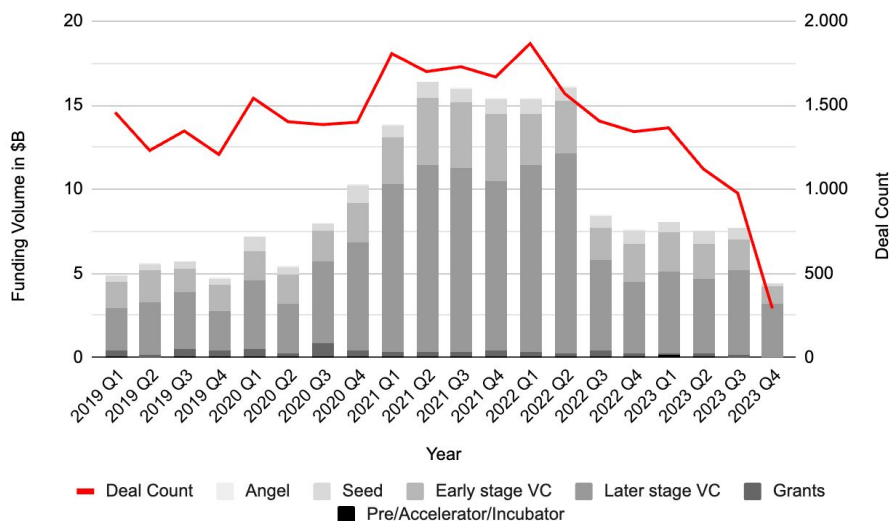
VENTURE ANALYSIS

Venture Activity
Funding Distribution
M&A Deals
Unicorn Landscape

Despite the sharp drop in H2/22, HealthTech has attracted significant investments outpacing most other sectors

Quarterly funding in HealthTech

Total funding and number of rounds, Q1/19 - Q4/23



Key take-aways

- The **HealthTech sector** experienced a **substantial rise** in funding throughout the **pandemic**
- **Quarterly funding volume** peaked in **Q2/21** at **\$16.43B** invested, over 1,700 rounds
- **Volume** dropped by **almost 50%** in **Q3/22** staying around **\$7.5B** in **quarterly funding**
- In **2023** the funding volume reached a total of **\$27.69B** over **3,750 rounds**
- Over the **last 5 years** **\$188.87B** were invested into the sector

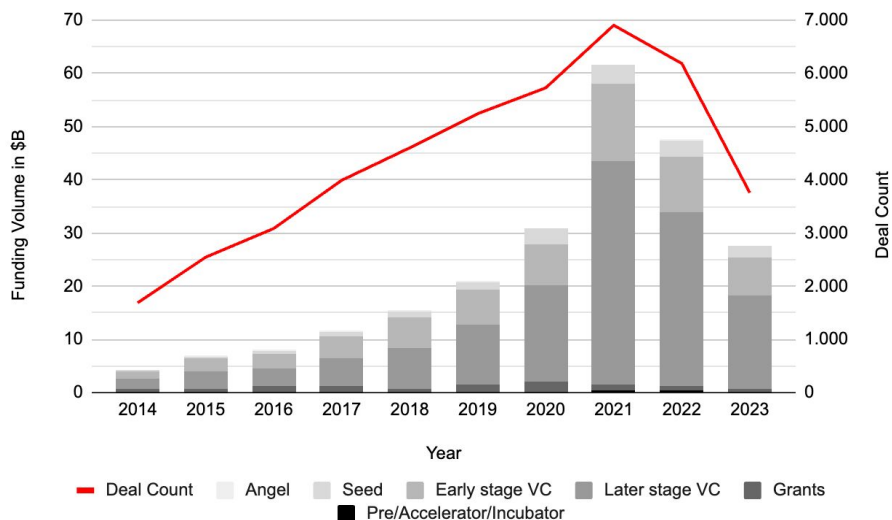
Notable Startups & Investors

- **Notable Startups:** CMR Surgical, Carbon Health, Ro, Neuralink, Everly Health, Kry
- **Notable Corporate VCs:** GV, Merck, Novartis, Samsung, Blue Venture Fund, Optum Ventures, Tencent, Intel Capital, General Electric, Leaps by Bayer, Bristol-Myers Squibb, Johnson & Johnson

A return to healthy valuations in funding is in sight for HealthTech startups

Annual funding in HealthTech

Total funding and number of rounds, 2014 - 2023



Key take-aways

- **\$2.35B** were invested in the **last 10 years** in HealthTech startups
- **Investment Volume** peaked in **2021** at **\$61.73B** invested over **6,904 rounds**
- There are **17,900 VC-backed startups in the sector**, of which over 20% have raised Later Stage VC funding
- **60%** of investments took place in **Later Stage** Rounds with **investments, totaling \$143.55 billion** throughout the years.

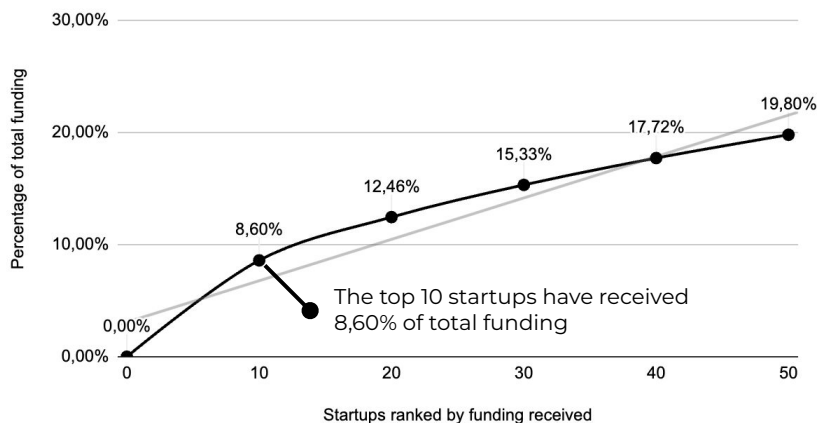
Investors

- **Corporates:** Google, Merck, Johnson & Johnson, Amazon, Novartis, Optum
- **Venture Capitalists:** HTGF, Alumni Ventures, Khosla Ventures, Founders Fund, Andreessen Horowitz, Entrepreneur First
- **Government:** Innovate UK, National Science Foundation, EIT Health, National Institutes of Health

Funding in the HealthTech segment is evenly distributed with no significant increases in funding over the years

Cumulative funding

Percentage of total funding

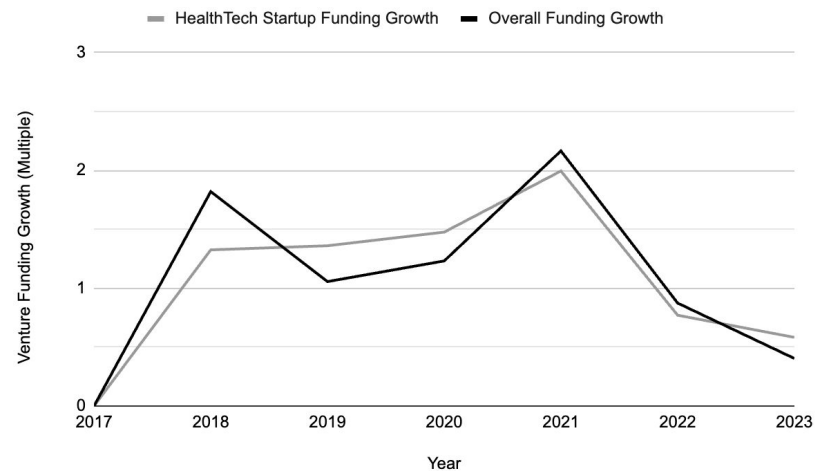


Take-away

Funding among **HealthTech startups** is **extremely evenly distributed** compared to many other sectors.

Venture funding growth in HealthTech

Indexed growth, funding in 2017 indexed to 1x



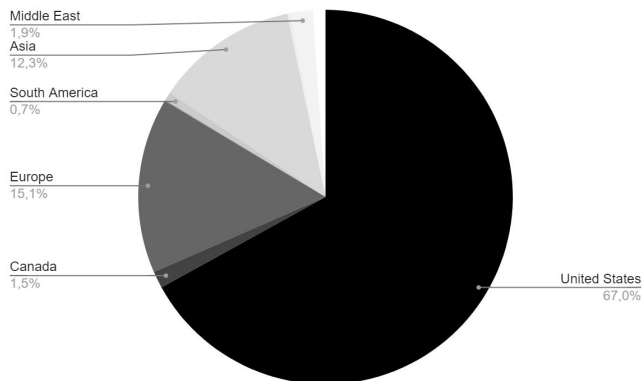
Take-away

Funding growth for HealthTech startups is has **outpaced** the **overall VC market** in **2019, 2020** and **2023** so far.

The US Leads the Way in Health Tech Advancements

Capital Invested by Global Region

by region in %

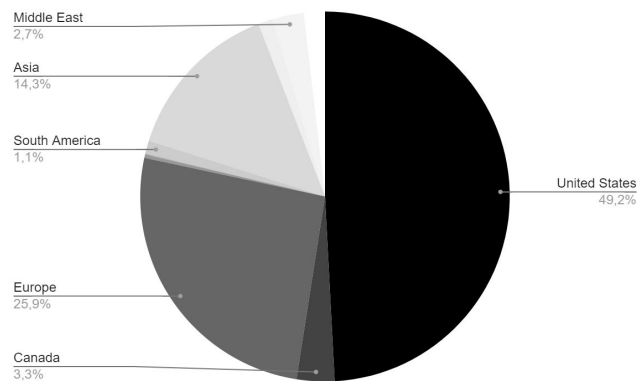


Take-away

- The **United States is in the forefront with investments of \$111.9B**, demonstrating its prominent position in the health tech industry.
- **Europe (\$25.3B) and Asia (\$20.6B)** follow in health tech investments which might be due to their **large and growing healthcare markets and increasing demand for innovative solutions.**

Deal Count by Global Region





















by region in %



Take-away

- The **United States has the highest deal count (11,057)** this might be due to its well-established health tech ecosystem.
- **Europe and Asia closely follow with 5,821 and 3,206 deals**, respectively, indicating significant activity and growth in the health tech sector in these regions as well.

Largest VC-backed Acquisitions in the last three years

Company	Acquisition Value	Date	Acquirer	Segment
 Cerner	\$28.23B	June, 2022	 ORACLE	Healthcare System Software
 Livongo	\$13.94B	October, 2020	 Teladoc HEALTH	Diabetes Management App
 one medical	\$3.50B	February, 2023	 amazon	Primary Care Platform
 ginger	\$3.00B	October, 2021	 headspace	Telemental health counseling
 naviHealth	\$2.95B	May, 2020	 Optum	Healthcare Platform
 fitbit	\$2.10B	January, 2021	 Alphabet	Fitness Tracking
 MDLIVE	\$2.03B	April, 2021	 Cigna	Telehealth Care
 IMMUCOR	\$2.00B	March, 2023	 werfen	Transplantation Technology
 MYR Pharmaceuticals	\$1.93B	March, 2021	 GILEAD	Innovative Hepatitis B and D Therapeutics
 Versanis	\$1.93B	July, 2023	 Lilly	Healthcare Prevention

Top Corporate VC investments in HealthTech



freenome



bit.bio
THE CELL CODING COMPANY

Tencent



AETION



SOMATUS.
REVOLUTIONIZING KIDNEY CARE



Nucleome
Therapeutics



orbita

swatch



PHILIPS

SAMSUNG VENTURE
INVESTMENT

ALODOKTER



F2G



AETION

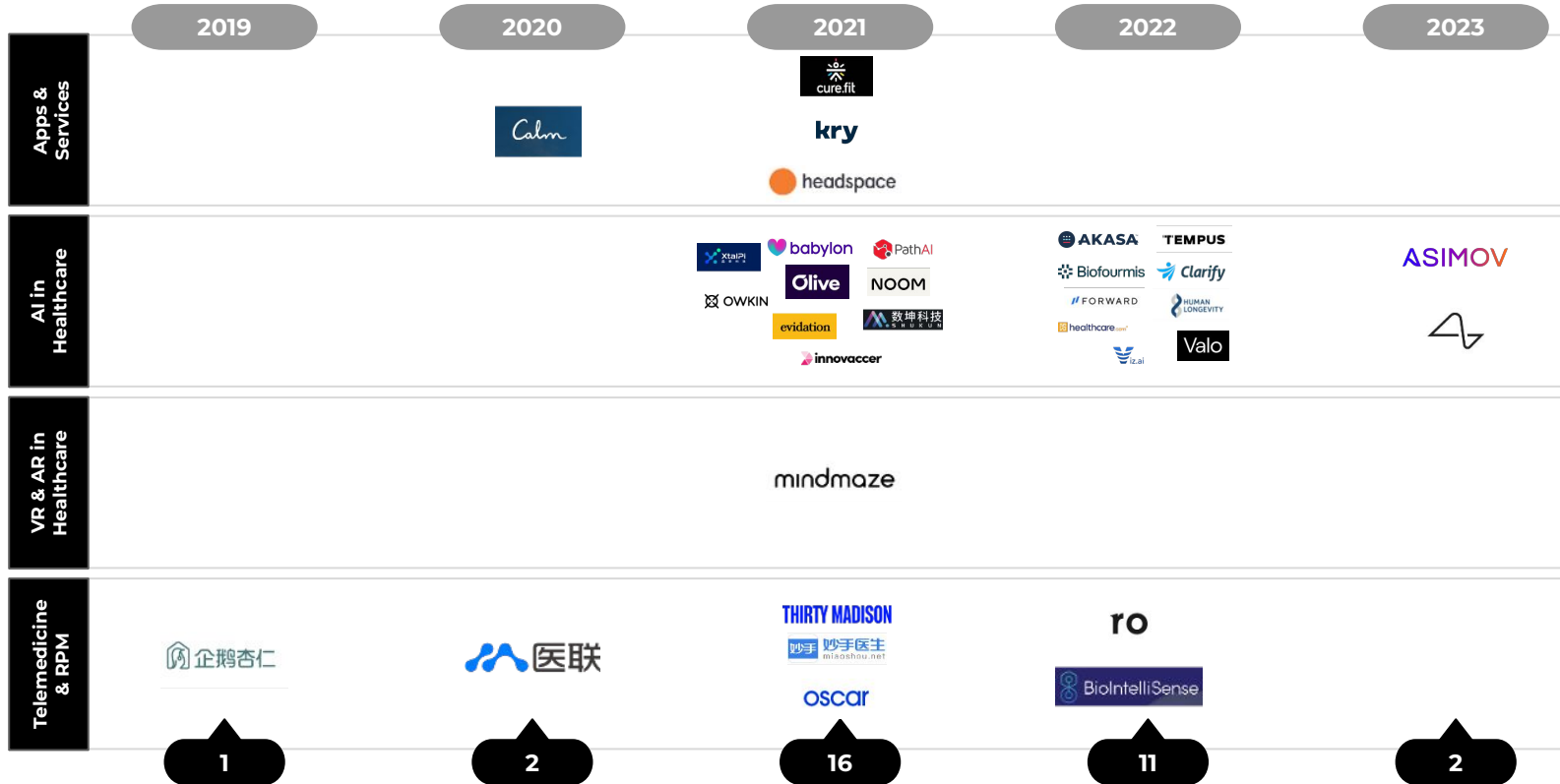


AIM



HealthTech Unicorns in the last 5 years (Page 1)

AI in Healthcare and Well-being Apps were prominent trends



45 unicorns

representing \$137B+ in market value today

HealthTech Unicorns in the last 5 years (Page 2)

Diagnostics & Screening has seen high valuations lately



45 unicorns

representing \$137B+ in market value today

PROMISING STARTUPS

Eight Clusters define the HealthTech innovation landscape



1

Apps & Services



Hibi



Diagnostics & Screening

Boston
Scientific

5

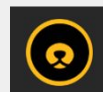


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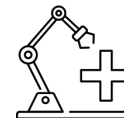
AI in Healthcare

Diffuse
BIO

Robotics & Automation

AGILIS
ROBOTICS

6



3

VR & AR in Healthcare

HEKA VR



Navari

Internet of Medical Things



SPIKE

BYTEK

7



4

Telemedicine & Remote Patient Monitoring

MOTTO



Organ Care Tech & Bioprinting

BRINTER™
PRINTING LIFE ONE LAYER AT A TIME

A.D.A.M.

8



Apps & Services

How do we use apps to enhance well-being and our health?

Startups building Apps and Services for Patients & Practices

Fitness & Well-Being Apps

Patient Education Platform

Practice Management Software

Homecare Services



Digital therapeutics when, where and how you want it

NOOM

Dietary app for weight loss and chronic conditions



Syllable

Patient engagement platform



AI-based clinical trial matching platform



AI-based patient flow management platform

notable

AI-powered physician-patient interaction platform

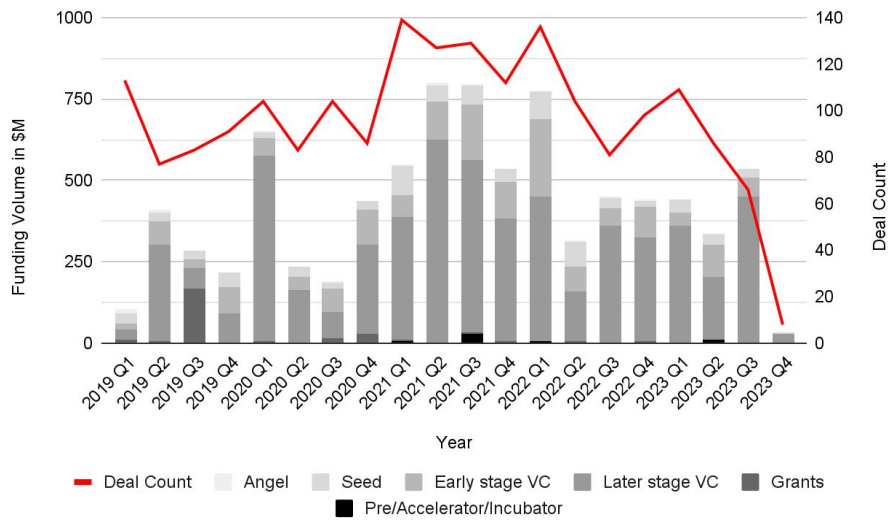


Housecall medical services on demand

hazel

School-based telehealth for mental and physical health

Funding has been relatively stable with emerging startups focusing on digitization, mental well-being, and FemTech



of Companies
total / funded

2.151 / 1.314

of Exits
IPOs / M&As / Buyouts

17 / 173 / 40

Out of Business

226

Investment Volume
2023






\$1.35B

Notable Corporates:

Notable Exits:

Notable Investors:

Major Investments in the Apps & Services segment

	Business Model	Investors	Total Funding
	The company's application allows users to consult with a qualified health professional in minutes via their smartphone or tablet at any time or location, enabling patients to have seamless access to healthcare .	Accel, Creandum, EQT Ventures, Index Ventures, Project A Ventures, Fidelity and others	\$540.26M Series D
	The company's platform addresses the concept of preventive healthcare through a combination of engagement, coaching, and delivery by offering services for mental wellness, healthy food, and fitness through its mobile application .	Tata Group, Zomato, Unilever Ventures, Temasek, Accel and others	\$497.49M Series F
	The company's platform provides a B2B corporate fitness subscription solution to employers and highly personalized and data-driven fitness experiences to employees and gym users alike.	High-Tech Gründerfonds, Bayern Kapital, Cumulus Ventures, Mayfair Equity Partners and others	\$427.54M Series F
	The company allows posting staffing needs by location, time, and type of care through a convenient portal , where shifts will be instantly available for the network of healthcare professionals to claim.	SVB Capital, Audacious Capital, Healthworx, Blue Heron Capital, Motley Fool Ventures and others	\$350.73M Later Stage VC
	The company offers an application that provides mindfulness and breathing techniques training through guided meditation and chats to help users take care of their mental health and improve their quality of sleep .	Khosla Ventures, Blackstone, Revelation Partners, Advance Venture Partners, and others	\$320.65M Debt

Hibi

Search Field	Parents Support, Medical Appointments, Digital Health
Location	London, UK
Year Founded	2022
Total Funding	\$0.10M (Accelerator)
Last Round	\$0.10M (01/2023)
Investor	Entrepreneur First
Website	hibi.health

Business Overview

- Hibi is an **app for families caring for children with additional needs** and long term conditions
- The app support parents to **manage, coordinate, and navigate** the **child's care** with digital tools and **access to care support**

Use case & customers

- The app allows parents to **connect with healthcare professionals**, and **store, track and share symptoms**, behaviours, and **appointments of their children** all in a data secure manner

Similar Companies

- **Sameview** (2016, Seed (\$0.03M), StartUp Health, Remarkable Accelerator and others)
- **Undivided** (2019, Seed (\$5.94M), StartUp Health, Barrel Ventures, Red Sea Ventures)

Business Overview

- Amayu is becoming the leading provider of integrative **psychedelics-based care**
- Patients **receive psychedelics in** one of their **clinics**, while getting **support from** their network of **experienced psychotherapists online** and **self-help via** their **patient care app**

Use case & customers

- Currently they have **300 people on** their **waitlist**, partnered with **20 clinicians** and are being **advised by leading university experts** from Charité, Cologne and Yale
- They are now **ready to pilot their prototype** with first customers

Similar Companies

- **Mindbloom** (2018, Series B (\$44.90M), 8VC, Kleiner Perkins and others)
- **Nue Life** (2020, Buyout (Undisclosed), Beckley Waves)

Amayu Health

Search Field	Psychedelics Therapy, Mental Health, Psychedelic Drugs
Location	Berlin, Germany
Year Founded	2023
Total Funding	Undisclosed (Accelerator)
Last Round	Undisclosed (2023)
Investor	Entrepreneur First
Website	amayu.de



Apps & Services

Apps & Services



AI in Healthcare

How will Artificial Intelligence impact
the future of healthcare?

Startups offering AI-enhanced Healthcare solutions



Implantable Brain-Machine Interface



AI-based drug discovery



Data activation platform for healthcare facilities



AI-enabled precision medicine



Augmented reality screens on a contact lens



AI-based platform for in vitro fertilization



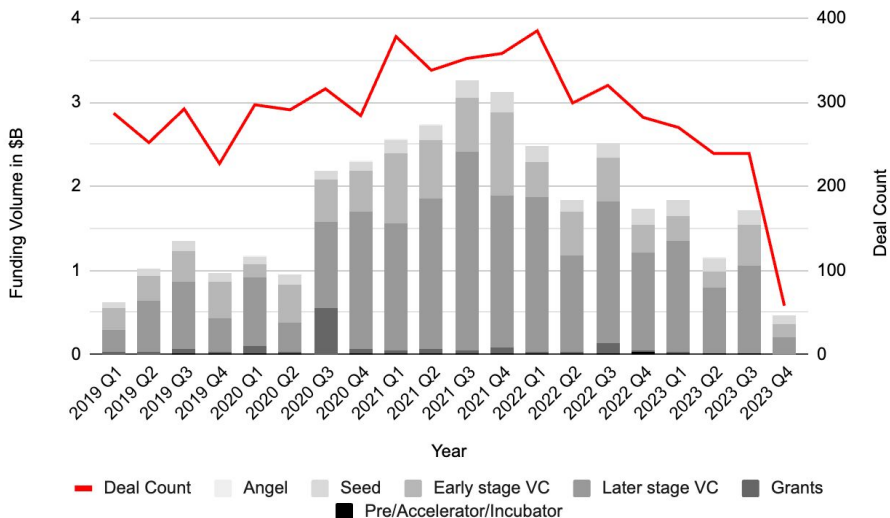
AI-based personalized and predictive health scoring



AI-powered precision pathology

Funding volume nearly doubled every year until 2021

AI applications in Healthcare remain a hot trend



of Companies
total / funded

3.689 / 2.785

of Exits
IPOs / M&As / Buyouts

47 / 152 / 44

Out of Business

203

Investment Volume
2023






\$5.16B

Notable Corporates:

Notable Exits:

Notable Investors:

Major Investments in the AI in Healthcare segment

	Business Model	Investors	Total Funding
	Tempus leverages Generative AI to gain insights from its large libraries of multimodal data , thereby providing AI-enabled precision medicine solutions to physicians to deliver personalized patient care and facilitating discovery, development and delivery of optimal therapeutics .	Alphabet, Novo Holdings, T. Rowe Price, Franklin Templeton, Revolution Group and others	\$1.41B Series G
	XtalPi is a quantum physics and AI-powered pharmaceutical technology platform that provides integrated drug discovery solutions for global pharmaceutical companies. XtalPi has pioneered a new model for drug R&D that leverages AI , autonomous labs, and expert domain knowledge.	Alphabet, Softbank, Tencent, Susquehanna Asia Investments, HongShan (Sequoia China), and others	\$784.75B Series D
	Neuralink develops implantable brain-machine interfaces (BMIs) . These interfaces aim to help humans merge with artificial intelligence , treat neurological disorders , and enable direct communication between computers and the brain.	Alphabet, Founders Fund, Sam Altman, Founders Fund, GigaFund, Craft Ventures and others	\$644.17M Series D
	The company's platform integrates machine learning, cloud computing, and data to analyze human data to uncover previously unsuspected associations between genetic markers and disease with a human-centric framing.	Mercury Fund, Koch Disruptive Technologies, HBM Partners, Lanza techVentures, and others	\$595.00M Series C
	Their platform offers secure messaging to facilitate efficient communication about patient care among clinicians. The aim is to enhance patient outcomes by streamlining communication and reducing administrative tasks in the healthcare setting.	Samsung NEXT Ventures, Softbank, Marc Benioff, Khosla Ventures, Founders Fund, and others	\$557.50M Series E



Asepha

Search Field Medical Database, Context Based Analysis, Health Data

Location Toronto, Canada

Year Founded 2023

Total Funding \$0.12M (Accelerator)

Last Round \$0.12M (07/2023)

Investor Techstars, Ripple Ventures

Website asepha.ai

Business Overview

- Asepha is building an **AI-enabled clinical decision support (CDS) tool**, leveraging disparate datasets of research, trials, and **healthcare data mapped** through their **own LLM** to help healthcare professionals provide better care.

Use case & customers

- Asepha's **AI-driven platform** utilizes a **proprietary algorithm**, employing multi-dimensional, **context-based analysis** to process extensive **patient-specific data** sourced from trusted medical databases.

Similar Companies

- **Inference Analytics** (2016, Seed (\$2.62M), Bold Brain Ventures and Angel Investors)
- **HiLabs** (2014, Series A (\$1.91M), Season Two Ventures and Angel Investors)

Business Overview

- Diffuse Bio, uses AI to innovate in **protein design**, drawing **inspiration from image-generating AI** tools like DALL-E.
- Their advancements allow for the **rapid creation of novel proteins**, potentially leading to **solutions for major health challenges** like cancer and viral diseases.

Use case & customers

- Diffuse Bio offers an **AI-software platform** for **drug design** and **experimental validation** of **AI-generated proteins** and **diffusion models** for **protein structure** and sequences.

Similar Companies

- **Biomatter** (2018, Seed (\$0.61M), Sofigama, Practica Capital, 70Ventures and others)
- **Evozyne** (2019, Series B (\$135.18M), NVIDIA, nVentures, Fidelity and others)

Diffuse Bio

Search Field Drug Design, Drug Research, Generative AI

Location Mountain View, USA

Year Founded 2022

Total Funding \$Undisclosed (Early Stage VC)

Last Round \$0.50M (10/2023)

Investor Y Combinator, Fellows.Fund

Website diffuse.bio



VR & AR in Healthcare

How will VR and AR revolutionize staff training, diagnosis and treatment in healthcare?

Startups building VR & AR solutions in the healthcare segment

VR-based
Therapy

Augmented Reality
Staff Training

VR-based
Kinesiology

Surgical
Procedures



VR-based therapeutics for behavioral health



Simulation-based training for healthcare professionals



Functional movement assessments through VR and motion capture technology



Telepresence during surgical procedures



Medical Hypnosis VR solution for patient pain, stress and anxiety



AR-enabled surgical training

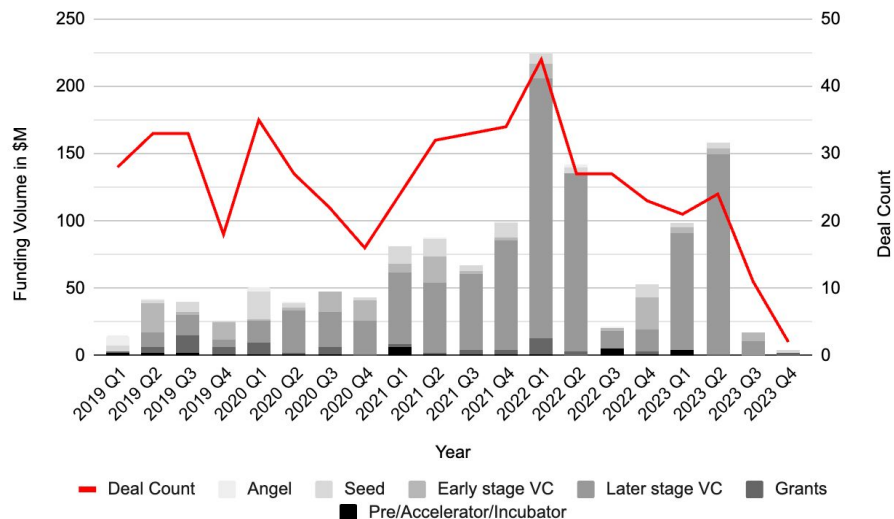


Neurorehabilitation through VR, motion capture and neurophysiological recording technologies



Real-time holographic visualization of patient's anatomy

The VR in healthcare market is set to grow by 34% annually driven by high demand to apply VR in surgical procedures



of Companies
total / funded

333 / 246

of Exits
IPOs / M&As / Buyouts

2 / 18 / 0

out of Business

25

Investment Volume
2023

\$278.15M

Notable Corporates:

accenture



Notable Exits:

SCOPIS
medical

Undisclosed
Stryker

oxfordvr
Immersive technology for mental health

Undisclosed
BehaVR






Notable Investors:



INSIGHT
PARTNERS



Major Investments in the VR & AR in Healthcare segment

	Business Model	Investors	Total Funding
	Mindmaze develops digital neurotherapeutic devices using VR, motion capture, and neurophysiological tech to aid brain recovery and motor function restoration post-stroke or brain trauma.	AlbaCore Capital Group, Concord Health Partners, EPFL Innovation Park and others	\$340.54M PE Growth
	The company develops an intelligent manufacturing execution system that uses AR, voice recognition, and AI in wearable and desktop devices to streamline drug production for pharmaceutical and life science companies, minimizing errors and inefficiencies.	Insight Partners, ICONIQ Growth, Touchdown Ventures, Hemi Ventures, GFR Fund and others	\$207.00M Series C
	Augmedics develops an augmented reality surgical system with a head-mounted display that allows surgeons to view a patient's anatomy through skin and tissue in real-time , aiding in complex surgeries.	Israel Innovation Authority, Almeda Ventures, XR Invest, MedTech Innovator, CPMG and others	\$148.60M Series D
	Proximie provides a telehealth platform for live surgery support , utilizing advanced technology to help surgeons practice and collaborate in and outside the operating room, even with low bandwidth.	Draper Associates, Softbank, Emerson Collective, Maverick Ventures and others	\$140.12M Series C
	The company operates a virtual reality training platform for surgical and medical device training , offering immersive experiences for both trainees and experienced surgeons to practice with the latest surgical tools and robotics.	Tiger Global Management, National Science Foundation, Plug and Play, Duro Ventures and others	\$108.97M Series C

HEKA VR

Search Field	VR Therapy, Schizophrenia Therapy, Voice Modulation
Location	Copenhagen, Denmark
Year Founded	2022
Total Funding	\$0.50M (Accelerator)
Last Round	\$0.50M (09/2022)
Investor	BioInnovation Institute
Website	hekavr.com

HEKA VR

VR & AR in
Healthcare

Business Overview

- HekaVR employs **advanced virtual reality** and **voice modulation technologies** to offer **immersive therapies** for patients with **auditory hallucinations**, especially those with treatment-resistant **schizophrenia**
- The company is a **spin-off** of **Khora Virtual Reality**

Use case & customers

- Within a **controlled** and **therapeutic environment**, patients learn **coping mechanisms**, gain better understanding, and potentially **reduce the severity** and frequency of their **auditory hallucinations**

Similar Companies

- **Oxford VR** (2016, Acquired (Undisclosed), BehaVR)
- **vTime** (2015, Series A (\$21.05M), Deepbridge Capital, Kin Group, MSIF)

Business Overview

- Navari offers a **software solution** that overlays **augmented reality imagery** onto the **standard laparoscopic camera feed** for **liver surgeries**. This enhancement helps surgeons **navigate more accurately**, ensuring safer and more **precise removal** of **liver tumors**.

Use case & customers

- Before surgery, a **3D liver scan** is taken. Navari's **AR software** processes this scan to highlight a **tumor's location**. During the **keyhole surgery**, this enhanced image **overlays** the surgeon's **real-time camera view**, guiding the operation.

Similar Companies

- **EchoPixel** (2012, Series A (\$14.90M), Intel Capital, Lam Capital, and others)
- **Intuitive Surgical** (1995, Public (\$91.18B), Ticker Symbol: ISRG)

Navari

Search Field	Tumor Detection, Cancer Treatment, Augmented Reality
Location	Gothenburg, Sweden
Year Founded	2021
Total Funding	\$0.73M (Pre-Seed)
Last Round	\$0.68M (11/2022)
Investor	Almi Invest, Chalmers Ventures and others
Website	navarisurgical.com

VR & AR in
Healthcare



Telemedicine & Remote Patient Monitoring

How can we streamline medical consultations in a remote setting?

Startups offering Remote Consultations and Patient Monitoring

Video Consultations & Connected Apps



ada

Virtual health companion to assess symptoms



Connecting doctors with patients for video consultations

Teletherapy and -rehabilitation



Remote speech therapy, occupational therapy, and mental health services



Health and emergency support systems for connected care

Wearable Devices & Home Monitoring Kits



Remote patient monitoring through a medical device



Wearables for digital physical therapy

Telepharmacy

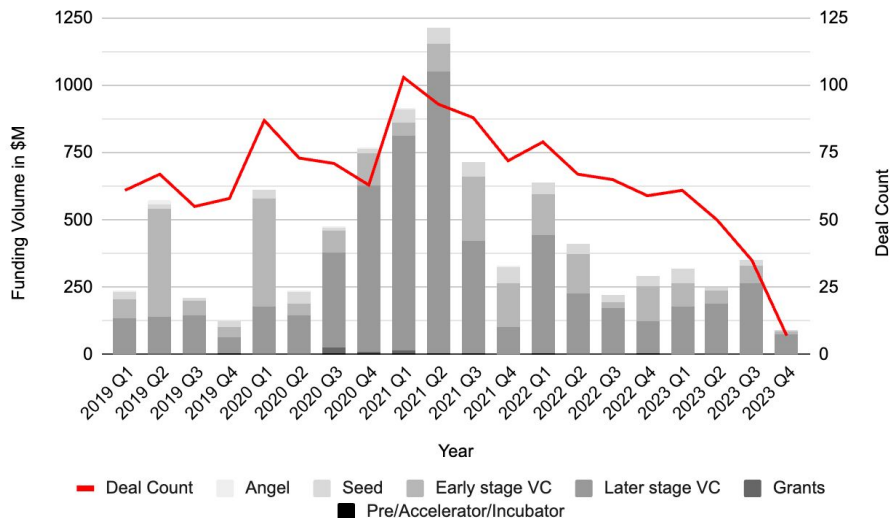


Online pharmacy for dermatology patients



Digital Pharmacy Platform

Fueled by the need for virtual health consultations funding took off during the pandemic



of Companies
total / funded

1.561 / 794

of Exits
IPOs / M&As / Buyouts

33 / 199 / 62

Out of Business

100


Investment Volume
2023

\$1.01B

Notable Corporates:



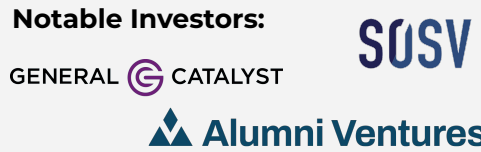
Notable Exits:








\$389.00M
Best Buy

Undisclosed
Walmart

Notable Investors:



Major Investments in the Telemedicine & Remote Patient Monitoring segment

	Business Model	Investors	Total Funding
	Ro operates a telehealth platform for direct-to-consumer services, offering end-to-end solutions for conditions like erectile dysfunction and smoking cessation , allowing users to access free medication delivery and personalized treatment options .	Blackrock, Coatue Management, Insight Partners, General Catalyst, T. Rowe Price and others	\$1.03B Series D
	Medlinker provides a social networking platform that connects doctors , streamlines referrals, and facilitates medical record sharing , benefiting patients by enabling appointment booking and medical community interaction.	Lightspeed China Partners, Tencent, Yunfeng Capital, Orion Venture Partners and others	\$768.34M Series E
	The company develops a cloud-based software platform that enhances home care agencies' innovation and efficiency by offering integrated tools for planning, documentation, remote monitoring , and more, streamlining their operations.	Canada's Digital Technology Supercluster, Chrysalis Ventures and others	\$294.14M Series D
	The digital healthcare platform connects patients with doctors for online consultations via video, voice, and chat, and also offers home-based lab tests , providing real-time access to health advice and clinicians.	crew Capital, Allianz X, Alto Partners, Astra Digital International and others	\$285.00M Series D
	Huma provides digital platforms for remote patient monitoring and virtual clinical trials , using connected devices and AI to improve healthcare outcomes. It supports 'hospital at home' care , integrating with healthcare systems prioritizing data security .	AstraZeneca, Hitachi Ventures, Bayer, Samsung NEXT, Sony, Unilever, Leaps by Bayer and others	\$241.66M Series D

Motto

Search Field	Virtual Care Platform, Chronic Disease Treatment
Location	New York, US
Year Founded	2022
Total Funding	\$4.00M (Seed)
Last Round	\$4.00M (04/2022)
Investor	Redesign Health
Website	mottohealth.co

Business Overview

- Motto Health is a **virtual specialty care** provider for **autoimmune** and **chronic inflammatory conditions**
- It **combines AI-based tools** and a **dedicated care team** to offer **personalized treatment plans** and lifestyle recommendations

Use case & customers

- The platform streamlines **symptom tracking**, medication management, and **appointment scheduling** through its **app** and offers simplified **1:1 coachings**
- Serving patients in **California & Texas**

Similar Companies

- **One Medical** (2007, Acquired (\$3.5B), Amazon)
- **Virta Health** (2014, Series E (\$364.59M), Sequoia Capital, Tiger Global Management and others)

Business Overview

- Fleming **connects patients with medical professionals**, eliminating the need for long waits and travel to hospitals.
- The platform is **enhanced by AI**, leveraging a secure, regularly **updated medical database** to **analyze symptoms** and provide guidance.

Use case & customers

- Fleming's **AI Therapist** "chatbot" offers **personalized mental health care** by leveraging **data from thousands of therapy sessions** and **symptom checks**, using an **encrypted dialogue system** for custom, secure interactions

Similar Companies

- **Babylon Health** (2013, Bankruptcy (Raised \$1.15B), Munich Re, DeepMind, and others)
- **Ada Health** (2008, Series B (\$167.41M), Leaps by Bayer, Samsung and others)

Fleming

Search Field	Online Medical Consultation, Healthcare App
Location	Vilnius, Lithuania
Year Founded	2020
Total Funding	\$1.41M (Seed)
Last Round	\$1.41M (08/2021)
Investor	Kilo Health, European Commission
Website	fleming.app



Telemedicine & RPM

Telemedicine & RPM



Diagnosics & Screening

How can we better identify patients' diseases and conditions?

How Startups are diagnosing and screening for diseases and conditions

Laboratory Diagnostics

Imaging Diagnostics

Point-of-Care Testing

Molecular Diagnostics



Medical equipment and support for better patient care.



Enabling accurate diagnosis of medical images.



Rapid diagnostics and testing



Data analysis of genomics and other molecular data



At-home Kidney Health Test Kit



Imaging diagnostic technology for personalized leukemia treatment

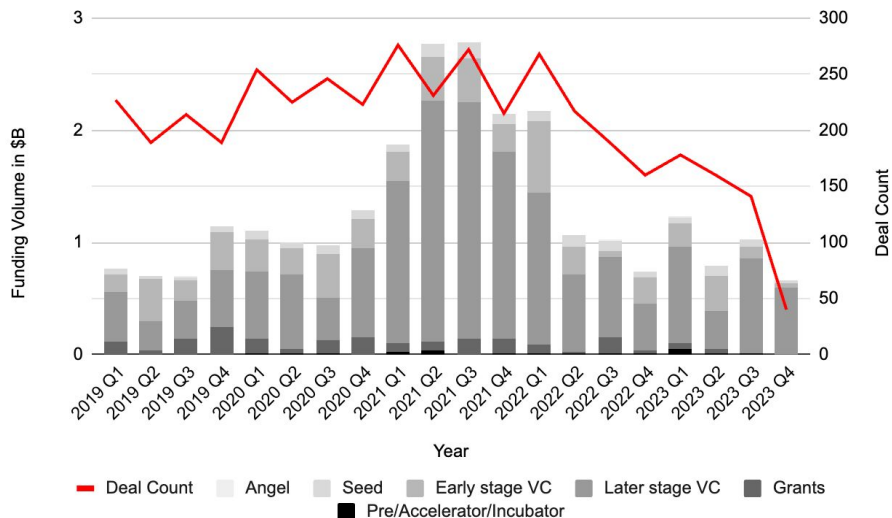


Nanotechnology-based diagnostic platform for rapid medical diagnosis



Automated PCR data analysis software for instant diagnosis in molecular diagnostics

A flood of investors has entered the segment to finance novel diagnostics and screening technologies



of Companies
total / funded

3.314 / 2.266

of Exits
IPOs / M&As / Buyouts

98 / 283 / 67

Out of Business

224

Investment Volume
2023

\$3.70B

Notable Corporates:

Notable Exits:

Undisclosed
Siemens
Healthineers

\$407.00M
Thermo Fisher
Scientific

Notable Investors:



Major Investments in the Diagnostics & Screening segment



Business Model

HeartFlow offers a **non-invasive personalized cardiac test**, which allows physicians to identify and better treat patients with **suspected coronary artery disease**. It provides coronary artery anatomy analysis, physiology, and plaque information **based on CCTA**.

Investors

Baillie Gifford, Bain Capital, Blue Venture Fund, Brookside Equity Partners and others

Total Funding

\$828.78M
Series F



Everly Health provides an **at-home kidney health test kit**, aiming to reduce costs linked to **Chronic Kidney Disease** by enabling **early detection** with convenient, **remote diagnostics** that are as accurate as traditional lab tests.

BlackRock, Sequoia Capital, Touchdown Ventures, Hurt Family Investments and others

\$638.10M
Series F



Provides a **cloud-based platform** for **genomic** and other **biomedical data**. It offers tools for **large-scale DNA and RNA sequencing** data analysis, management, and collaboration, **servicing researchers**, clinical labs, pharmaceutical companies, and healthcare providers

Blackstone, Microsoft, GV, Wireframe Ventures, First Round Capital, Northpond Ventures and others

\$478.73M
Series I



Their technology is designed to enable healthcare providers to **perform on-the-spot testing** for **various infectious diseases**, including **sexually transmitted diseases** and **COVID-19**, without the need for sending samples to a lab.

John Doerr, Lightrock, ND Capital, 1809 Capital, Dynamic Loop Capital, and others

\$431.62M
Series E



The company creates **advanced genetic analysis tools**, specifically a **modular DNA sequencing platform for research and diagnostics**, providing medical researchers with high-quality data and flexible workflows.

Morgan Stanley, Logos Capital, Fusion Fund and others

\$406.30M
Series C

Digital Dental & Healthcare Technology

Search Field	Dental implantology
Location	Grünwald, Germany
Year Founded	2020
Total Funding	Undisclosed
Last Round	Undisclosed
Investor	Bavarian Innovation Fund
Website	www.ddht.de

Business Overview

- Providing **essential software and hardware tools for daily dental practice**, DDHT specializes in an **ultrasonic device for precise jawbone quality examinations**, ensuring **successful implantology outcomes and aiding in the detection of FDOJ's**.

Use case & customers

- Tailored for **holistic dentists and implantologists**, DDHT offers **cutting-edge technology, like our ultrasonic device**, for **detecting silent inflammations and assessing jawbone quality**, ensuring comprehensive patient care.

Similar Companies

- **Qikserve** (2011, Later Stage (\$12.33M), Par Equity and others)
- **Aliments** (2018, Undisclosed)

Business Overview

- A pioneer in **non-invasive colorectal cancer detection**, this company offers a groundbreaking virtual endoscopy system, **revolutionizing early diagnosis and treatment**, without the need for laxatives.

Use case & customers

- Their innovative technology **empowers healthcare providers to identify and address colorectal cancer in its early stages**, enhancing patient outcomes and survival rates.

Similar Companies

- **Oncobit** (2018, Early Stage VC (\$3.85M), Avanteca Partners and others)
- **Soar BioDynamics** (2005, Corporate (\$1.00M), Originate)

Boston Medical Sciences

Search Field	Medical Image Analysis
Location	Tokyo, Japan
Year Founded	2023
Total Funding	\$2.70M (Seed Round)
Last Round	\$2.70M (10/2023)
Investors	Beyond Next Ventures, NEDO Entrepreneurs Program
Website	www.b-ms.tech

Currently fundraising.
For more information contact
investments@peakzone.io



Diagnostics & Screening

Diagnostics & Screening



Robotics & Automation in Healthcare

How will Robots help address the growing healthcare worker shortage?

Startups building Robots and Automation Tools in HealthTech

Surgical Robots

Rehabilitation Robots

Assistive Robots for the Elderly & Disabled

Prosthetics & Orthotics Robots



Surgical Robots for minimally invasive surgery



Surgical Robots for orthopedic surgery



Wheelchair with standing up and walking functions



ORDINARY LIFE FOR EXTRAORDINARY PEOPLE

Hands-free walking exoskeleton



Social companion robots designed to help eldercare



THE PERSONAL ROBOT

Personal robot that can carry things, play music, control smart devices and assist in daily living



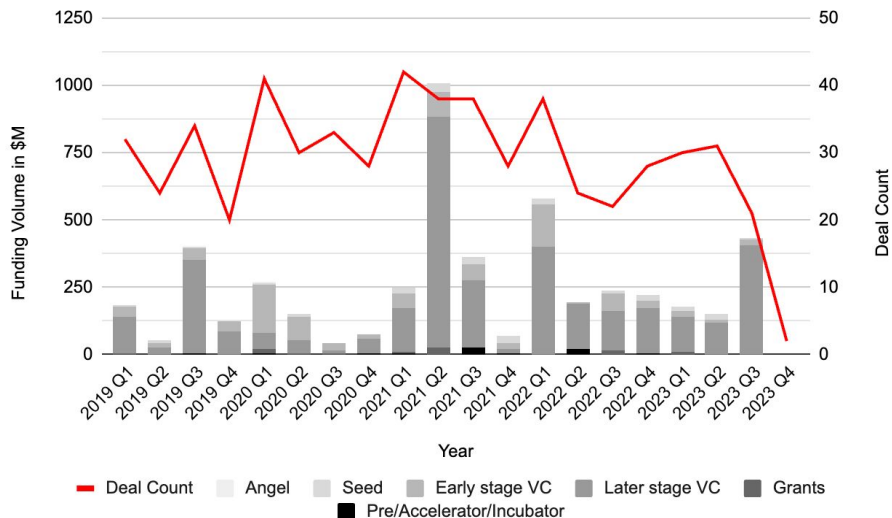
Advanced and affordable bionic arms



PRENSILIA
GRASPING INNOVATION

Robotic prosthetic hand for amputees

The majority of funding went to surgical robots aiming to assist surgeons for high precision procedures



of Companies total / funded
410 / 296

of Exits IPOs / M&As / Buyouts
14 / 35 / 14

Out of Business
14

Investment Volume 2023
\$761.02M

Notable Corporates:






Notable Exits:

AURIS \$3.5B Johnson & Johnson

Corindus \$1.1B Siemens Healthineers
Vascular Robotics

Notable Investors:

Major Investments in the Robotics & Automation segment

	Business Model	Investors	Total Funding
	The company develops surgical robots to make minimally invasive surgery accessible and affordable by expanding the range of procedures robots can perform and providing 3D HD imagery and feedback to surgeons.	Softbank, Tencent, GE Healthcare, ABB, Cambridge Innovation Capital, and others	\$1.18B Series E
	Noah Medical develops medical robotic devices for early diagnosis and treatment in advanced clinical settings, helping hospitals save lives with minimal scarring.	HongShan, Tiger Global Management, Softbank, Prosperity7 Ventures, Digital Capital, and others	\$286.80M Series B
	The company develops a robotic surgical system that improves orthopedic surgery outcomes, offering 3D preoperative planning and computer-assisted tools for hip and knee procedures , enhancing patient care with precision technology.	Black Lake Expeditions, KDB Investment	\$252.82M Corporate
	The company runs an AI-powered genetic medicine discovery tool using advanced robotics to generate extensive data for multiple machine learning systems . This helps researchers interpret and prioritize genetic variations for drug development .	Softbank, Khosla Ventures, Johnson & Johnson, True Ventures, Bloomberg Beta, and others	\$241.00M Series C
	Developer of a robot-assisted platform designed to provide surgeons with single-site access and visualization of hard-to-reach anatomical locations . The company's platform is based on a core flexible, steerable scope technology that surgeons can use to navigate around anatomy.	Hercules Capital, Eagle Ventures, Rosetta Capital, Slater Technology Fund, and others	\$214.33M Series H

Bearcover

Search Field	Robot Technology
Location	Berlin, Germany
Year Founded	2021
Total Funding	Undisclosed (Early Stage)
Last Round	Undisclosed
Investor	Mosel Ventures
Website	www.bearcover.de

Business Overview

- Specialization in **night-time robotic assistance for nursing homes, offering routine checks and supervision of residents**, optimizing staff time and enhancing resident care.

Use case & customers

- The robots **patrol corridors and conduct vital health assessments, alerting caregivers to residents needing immediate attention**, streamlining care and increasing resident interaction.

Similar Companies

- **Scopio Labs** (2014, Series C (\$102.53M), Aescuvest, Ilex Medical and others)
- **Markbotics** (2022, Seed (\$1.00M), Undisclosed)

Business Overview

- Innovative developer of **versatile surgical robots optimized for endoscopic surgery, enhancing surgical precision and dexterity** across various human organ systems.

Use case & customers

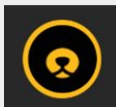
- Their surgical robots **empower surgeons to perform precise examinations and procedures in the digestive tract**, lower abdomen, large bowel, and bladder system, seamlessly **integrating with existing clinical workflows**.

Similar Companies

- **Vivo Surgical** (2018, Seed (\$1.25M), Undisclosed)
- **Auxin Surgery** (2014, Grant (\$3.18M), WBC Ventures, GoBeyond and others)

Agilis Robotics

Search Field	Surgical Robot
Location	Hong Kong, China
Year Founded	2021
Total Funding	\$7.54M (Series A)
Last Round	\$6.00M (08/2022)
Investor	K2VC, Korea Investment Partners
Website	www.agilisrobotics.com



Robotics & Automation

Robotics & Automation



Internet of Medical Things

How will we seamlessly analyze and monitor health data?

Startups building IoT solutions to leverage health data

Medical-Grade Wearables



Disposable Medical-Grade Monitoring Devices



Wearable biosensor to track patient health

Remote Patient Monitoring Devices



Infrared sensors for monitoring and tracking patient health



Tracking and Support for Medication Intake

Personal Emergency Response Systems (PERS)



Product suite including connected devices, apps and wearables for emergency response services



Medical Alert System and Fall Detection

Data Management Platforms

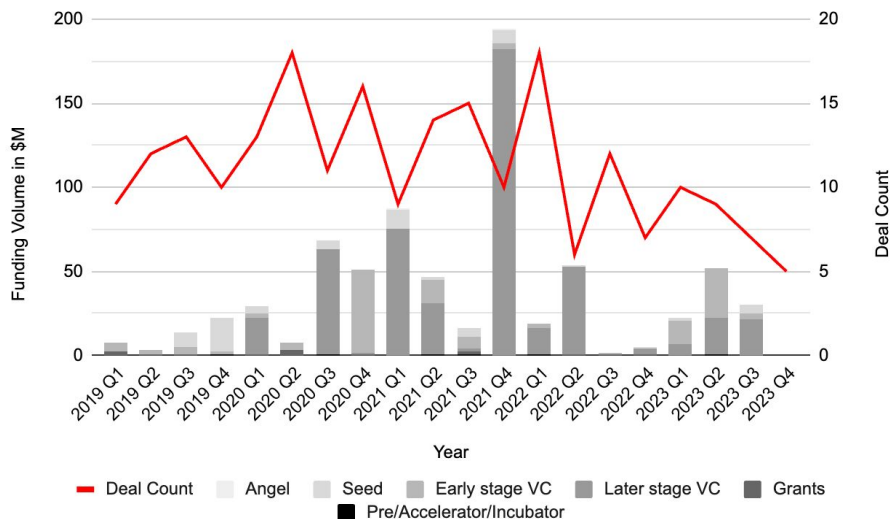


Managing Patient and Medical Device Data



Improving operational organisation for healthcare facilities

IoMT will enhance remote patient monitoring but cybersecurity concerns dampen the market outlook



of Companies
total / funded

182 / 125

of Exits
IPOs / M&As / Buyouts

0 / 8 / 1

Out of Business

18

Investment Volume
2023

\$192.50M

Notable Corporates:






Notable Exits:

\$110.14M

Notable Investors:



Major Investments in the Internet of Medical Things segment

	Business Model	Investors	Total Funding
	The company has developed a precision health platform that employs AI, IoT, and digital twin tech to assess and correct metabolic issues in diabetes patients, offering tailored treatment options.	Corner Ventures, DAG Ventures, G9 Ventures and others	\$214.39M Later Stage VC
	The company develops an application platform for healthcare institutions, offering mobile healthcare services, medical IoT, nursing education, and more, improving communication systems for better healthcare delivery.	Highlight Capital, Longmen Capital, Meihe Zhongbang, SB China Venture Capital and others	\$135.99M Series D
	This company offers comprehensive medical solutions using ICT and internet technology, focusing on mobile medical hardware, software, and clinical solutions for hospitals and doctors, enhancing efficiency and accuracy in healthcare management.	Addor Capital, BOC Guangdong Finance, V Star Capital and others	\$95.07M PE Growth
	birdie develops adult care technologies that transform home care for the elderly, offering tools for care professionals to assess, plan, and enhance care, along with IoT devices like infrared sensors for health monitoring, promoting a happier life at home for older adults.	AXA Venture Partners, Index Ventures, Kamet Ventures, OMERS Ventures and others	\$58.51M Series B
	The company offers a data-management platform that translates data into actionable insights and helps clients collect and manage IoT data securely, saving time and costs with tailored solutions.	Perennial Partners, Shaw and Partners	\$33.50M Later Stage VC

Spike

Search Field	Wearable Sensors
Location	New York, USA
Year Founded	2022
Total Funding	\$0.70M (Seed Round)
Last Round	\$0.70M (12/2022)
Investor	Axel Springer Porsche, CEAS Investments, Geek Ventures
Website	spikeapi.com

Business Overview

- This company develops **API and ETL algorithms for real-time data connectivity**, facilitating seamless **integration between applications and users' data**.
- **Collecting Health Data**

Use case & customers

- Their technology empowers **developers to access wearable data in various formats**, ensuring **easy integration with IoT and sensors, eliminating the need for costly backend development and adaptation**.

Similar Companies

- **Crio** (2015, Series B (\$16.77M), ABBHI Ventures, NXT Ventures and others)
- **Validic** (2010, Series B (\$30.29M), Arkin Holdings, Gershon Capital and others)

Business Overview

- Specialization in **research and development engineering, focusing on IoT ecosystems and product lines powered by voice assistants, AI, and cloud services**, offering end-to-end embedded systems development for user-friendly devices.

Use case & customers

- They designed a **smart home device that integrates voice recognition, AI, and cloud services for effortless home automation**, enhancing user convenience and efficiency.

Similar Companies

- **Ospitek** (2018, Seed Round (\$5.42M), Undisclosed)
- **SelfCareOne** (2017, Angel (\$1.95M), Johnson & Johnson Innovation)

Bytek Smart Solutions

Search Field	Voice assistant device
Location	Bilbao, Spain
Year Founded	2019
Total Funding	Undisclosed (Accelerator)
Last Round	Undisclosed (01/2020)
Investor	Robert Condon, Startup Health
Website	bytek.info



Internet of
Medical Things

Internet of
Medical Things

BYTEK

Organ Care Tech & Bioprinting

Will we be able to print living tissue and new organs?

How Startups are (re)generating organs and human tissue



Standardized hMSCs for regenerative medicine



Microfluidics, bioprinting, software, and cellular biology to create 3D human tissues



Enabling technologies for 3D bioprinting of tissues and organs



Creating complex, integrated organ systems on microfluidic chips



3D Organ-on-a-Chip and Medical Devices

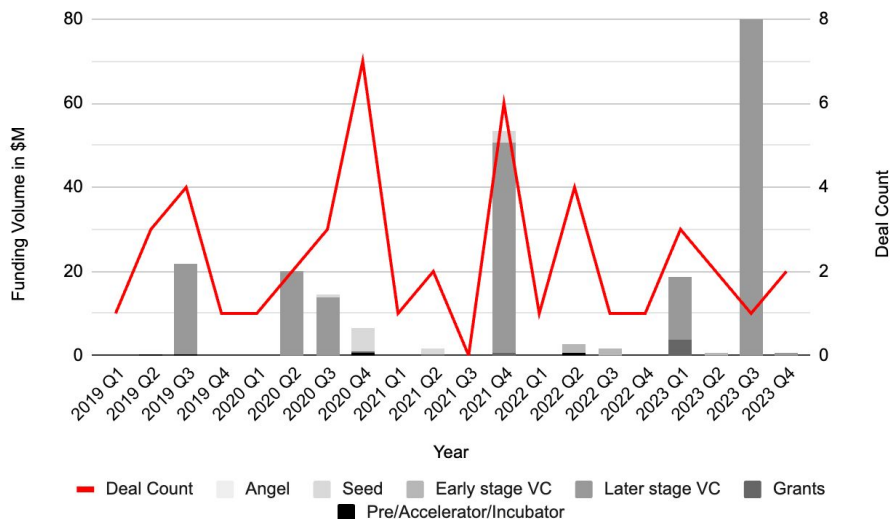


Patient-specific 3D-printed medical implants



Modular and customizable multi-material bioprinting solution

Startups are securing funding to print tissue and organs, which is still in its very early developmental stages



of Companies total / funded

25 / 18

of Exits
IPOs / M&As / Buyouts

1 / 0 / 1

Out of Business

2

Investment Volume 2023

\$100.11M

Notable Corporates:






Notable Exits:

TICKR: MTLF

Notable Investors:



Major Investments in the Organ Care Tech & Bioprinting segment

	Business Model	Investors	Total Funding
	This company develops personalized 3D-printed orthodontic brackets for precise digital dental treatments, improving control and efficiency for orthodontists in challenging cases.	Ally Bridge Group, American Association of Orthodontists, CareCapital and others	\$150.13M Series D
	The cell manufacturing company aims to boost regenerative medicine by providing human stem cells from bone marrow and adipose tissue , capable of immune system modulation and tissue regeneration for treating immune-related diseases .	Dynamk Capital, Vanedge Capital, TEDCO and others	\$29.61M Debt - PPP
	The company develops a full-stack tissue therapeutic platform with proprietary 3D bioprinting tech to advance biology, disease research, and regenerative medicine by creating living human tissues for research and therapeutic purposes.	Novo Nordisk, Government of Canada, Cascadia Venture Forum and others	\$20.78M Later Stage VC
	The biomaterials platform developer offers a versatile and cost-effective bio-fabrication process for regenerative medical products , eliminating the need for organ transplantation.	Alumni Ventures, Calm Ventures, Hawktail, Better Ventures and others	\$20.52M Series A
	This company offers bio-printing services using precise non-contact inkjet printing technology, serving the pharmaceutical, diagnostic, and life science sectors for creating tools in genomics, proteomics, patient stratification, and clinical diagnosis.	Department for International Trade, Archangel Investors	\$9.00M Later Stage VC

Brinter

Search Field	3D bioprinting
Location	Winston-Salem, USA
Year Founded	2020
Total Funding	\$2.23M (Early Stage VC)
Last Round	\$0.75M (06/2023)
Investors	Athensmed, Innovestors Ventures
Website	brinter.com

Business Overview

- Specialization in **3D bio manufactured implants** for **personalized orthopedic solutions, fusing regenerative materials and 3D printing to transform** individualized healthcare.

Use case & customers

- Their **bio-mods offer groundbreaking cartilage reconstruction, enhancing treatment for specific human injuries and conditions**, benefiting clinics and hospitals with **centralized biomanufacturing**.

Similar Companies

- **FluidForm** (2018, Later Stage VC (\$5.00M), Hackensack Meridian Health and others)
- **3DBio Therapeutics** (2014, Series A (\$31.44M), Network VC, Expa and others)

Business Overview

- This company specializes in a **point-of-care medical device production system**, enabling medical professionals to create **custom sterilized implants using their proprietary 3D-printing technology and materials**, resulting in cost and time savings for the healthcare industry.

Use case & customers

- Medical professionals can efficiently produce **personalized bioresorbable implants in-house, reducing costs and time associated with bone implant procedures**.

Similar Companies

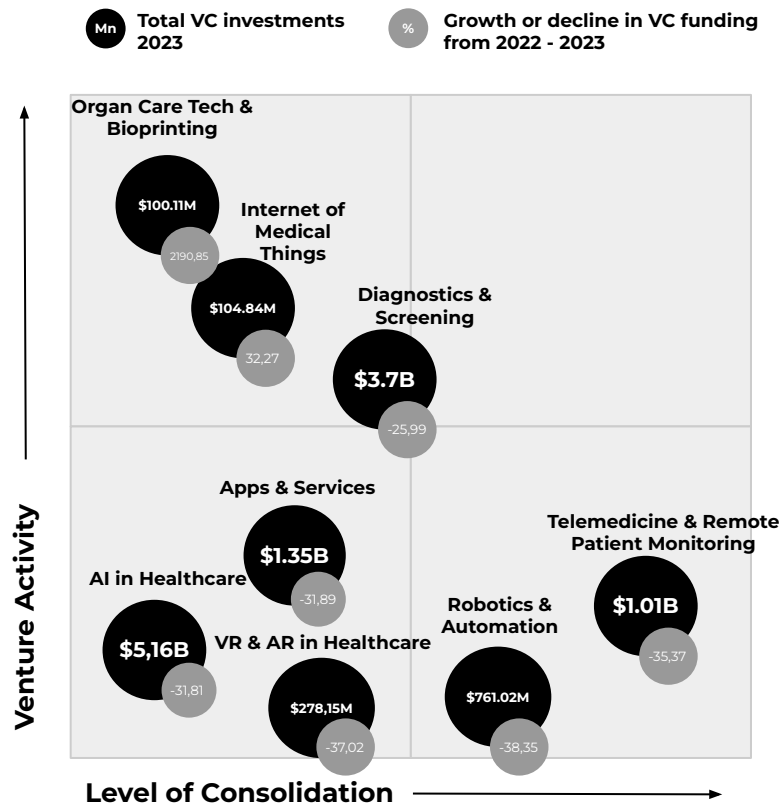
- **Lithoz** (2011, Angel (\$0.04M), AM Ventures, Hans Langer and others)
- **Formlabs** (2011, Secondary Transaction(\$253.13M), Ion Pacific and others)

A.D.A.M

Search Field	Sterilized personalized implants
Location	Stamford, USA
Year Founded	2019
Total Funding	\$0.69M (Later Stage VC)
Last Round	\$0.20M (10/2023)
Investor	MicroVentures, WeFundVentures, Mount Sinai Innovation Partners
Website	www.adambioprinting.com

SUMMARY

Ranking the HealthTech segments in relation to each other



The **global pandemic** has **increased investments** over recent years in the areas of Apps & Services and VR & AR In Healthcare while these sectors have seen relatively low M&A activity. **Telemedicine & Remote Patient Monitoring** saw the highest M&A Activity but a relatively decrease in Venture Funding. **AI in Healthcare** had the highest funding in 2021, which is also decreasing. **Robotics & Automation is a sector in within the investor activity is declining**, but the **M&A Interest is relatively high**. Diagnostics and Screening has **not a very strong decrease in Venture Funding**, like Internet of Medical Things, which is even **growing**. Both do not have a strong M&A Interest. **Organ Care Tech & Bioprinting had the most growing venture activity**, but yet 0% M&A Activity.



Apps & Services: The significant upward trend in the Apps & Services sector, particularly the standout year of 2021 with \$2.69B in funding, aligns with the emergence of diverse applications, notably in mental health, diet apps, and AI-powered patient interactions apps, reflecting the industry's dynamic response to evolving societal needs and technological advancements.



AI in Healthcare: The unprecedented \$11.69B in funding for AI in healthcare in 2021 signifies a profound acceleration of technological innovation, reflecting heightened investor confidence, diverse applications spanning diagnostics to personalized medicine, and a transformative impact on patient outcomes.



VR & AR in Healthcare: VR & AR in healthcare is driven by its multifaceted applications, including staff training, surgical simulations for risk reduction, support for individuals with developmental disorders and phobias, and therapeutic advancements, exemplified by programs like Psious aiding in overcoming fears.



Telemedicine & Remote Patient Monitoring: Telemedicine offers with its applications a good remote acute care and chronic disease management, coupled with cost-effective diagnosis and treatment, particularly in specialized fields like cardiology, contributed to its rising prominence.

SUMMARY



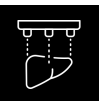
Diagnostics & Screening: Diagnostics & Screening technologies experienced notable growth, as their advancements in precise and efficient medical diagnostics, coupled with innovative screening approaches, contributed to their increasing significance in healthcare.



Robotics & Automation: Robotics & Automation in healthcare has witnessed substantial growth, playing a pivotal role in revolutionizing medical procedures, surgeries, and logistical processes to enhance efficiency and precision within the industry.



Internet of Medical Things: The Internet of Medical Things (IoMT) has become integral in transforming healthcare delivery by connecting devices, enabling data-driven insights, and enhancing patient care.



Organ Care Tech & Bioprinting: Engineering human tissue and organ systems from a 3D printer requires novel technologies and high upfront research effort. Startups are still scarce in the field and strategic investments are rare. Still, we could see a rise in new startups entering the space as the technology matures.

SUMMARY

Appendix

Additional HealthTech articles

16 tech startups making psychedelic therapy more effective and affordable

[Link](#)

These 12 Startups Are Ensuring Every Child Has Access to Quality Care

[Link](#)

Musk's Neuralink to start human trial of brain implant

[Link](#)

Generative AI startups to watch in Healthcare and Life Sciences

[Link](#)

20 Gen AI Healthcare Startups Shaping the Future

[Link](#)

Health AI startup Olive to shut down

[Link](#)

CONTACT DETAILS



Lorenz Hartung | CEO PEAKZONE GmbH

Sollner Str. 24h | 81479 Munich

e-mail: l.hartung@peakzone.io

phone: +49 176 4889 5000



Elias Maier | Chief of Staff PEAKZONE GmbH

Sollner Str. 24h | 81479 Munich

e-mail: e.maier@peakzone.io

phone: +49 176 4709 4134