

# L@b Brief | November/December 2025

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## COMMENT

### Two more standards to brighten your Christmas



**TWO NEW standards have been launched to join the maelstrom of standards for labs or lab suppliers. A standard for sustainability auditors, called, ISSA (UK) 5000 aims to ensure a consistent set of requirements for those providing sustainability assurance.**

**According to James Hay, a sustainable finance expert with law firm, Pinsent Masons, the new standard is useful for those providing limited assurance.**

**“Previously auditors have employed slightly different methodologies when carrying out limited assurance over sustainability disclosures. This can complicate matters for companies seeking to implement an audit-ready reporting process. This new standard should help tackle that uncertainty for UK companies, and provide consistency and guidance for UK assurance providers.”**

**The launch comes at the same time as a move to create more certainty around laboratory environmental measurements.**

**Many of the current standards set maximum energy use intensity limits (EUI) for science and technology buildings. But a one size fits all EUI is not appropriate for laboratories doing different kinds of science, says Phil Kelly, (partner at consultancy firm Ridge, and Deputy Research and Technical Officer for the UK chapter of the International Institute of Sustainable Laboratories). Phil is particularly focussed on the use of fume cupboards and says that for some types of laboratory, an EUI of 305 kWh/m<sup>2</sup>/yr will be unattainable, but best practice might be closer to 700 kWh/m<sup>2</sup>/yr. Others might be able to get as low as 100 kWh/m<sup>2</sup>/yr.**

**Until now, there has been very little data to support UK lab operators to make informed, evidence-based decisions, but now the Laboratory Benchmarking Tool hosted by I2SL, has nearly 1,500 buildings in its database.**

**Operators can now compare energy use, emissions and operational practices of similar facilities, located in similar climates, and even the technical specifications of systems and equipment. This provides much greater clarity around how efficiently they are using energy.**

**The I2SL launched in the UK earlier this year and is looking for UK operators to get involved, give feedback on the data, and start sharing theirs. You can explore the Laboratory Benchmarking Tool [here](#).**

**Manufacturers of fume cabinets and other energy-intensive lab equipment might want to take a look!**

**Toodle pip!**

***Jacqueline***

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## **UK News**

### **Government aims to speed up phase out of animal testing**

THE UK Government has published a Green Paper setting out a national strategy to replace animals in science by accelerating the development, validation and adoption of non-animal new approach methodologies (NAMs). The plan prioritises technologies including AI-driven modelling, genomics, organoids, microphysiological systems and 3D cell culture.



The objective is to phase out animal use where validated alternatives exist, while recognising that some animal research will continue in the short to medium term.

Six overarching objectives are set: accelerating replacement; achieving equal or better scientific and regulatory outcomes; increasing private-sector investment; raising regulatory

confidence; building infrastructure to use UK biological and toxicity data; and strengthening global leadership.

Deadlines in the Green Paper include:

- **By end of 2026** —regulatory animal testing for skin and eye irritation and for skin sensitisation is to stop.
- **By 2027** — ‘potency testing’ of botulinum toxin (e.g. mouse testing for Botox strength); and for contaminant testing of human medicines is to be halted in favour of DNA-based laboratory methods.
- **By 2030** — reduce pharmacokinetic studies on dogs and non-human primates (the studies that track how a drug moves through the body over time).

For further information, click [here](#).

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## MHRA smashes illicit weight loss medicine lab

OFFICERS FROM the Criminal Enforcement Unit (CEU) of the Medicines and Healthcare products Regulatory Agency (MHRA) have dismantled a major illicit manufacturing facility, making and distributing unlicensed weight-loss jabs, in Northampton.



This is the first illicit production facility for weight loss medicine discovered in the UK and is believed to be the largest single seizure of trafficked weight loss medicines ever recorded by a law enforcement agency worldwide.

MHRA officers seized tens of thousands of empty weight loss pens ready to be filled, raw chemical ingredients, and more than 2,000 unlicensed retatrutide and tirzepatide pens awaiting dispatch

to customers. The street value of the finished weight loss products alone is estimated to be more than a quarter of a million pounds.

Along with large amounts of sophisticated packaging and manufacturing equipment, officers recovered approximately £20,000 in cash.

The [MHRA #FakeMeds website](#) offers helpful guidance and advice for staying safe when buying medicines online.

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## AI hallucination leads to failed tender bid

A Polish contractor bidding for a road maintenance project had its abnormally low bid excluded by the country's National Appeals Chamber because its rock-bottom price had been partly generated by AI, which cited non-existent tax documents. Competitors had detected the AI 'hallucinations' in the bid and appealed according to the *Warsaw Business Journal*.

The Chamber confirmed that contractor Exdrog's 280-page clarification contained AI-generated falsehoods and ruled that the company failed to verify it, thus misleading the

contracting authority. The Chamber ruled it to be an oversight rather than deliberate fraud, but still disqualified Exdrog's bid.

Jan Styliński, representing the Polish Construction Employers' Association, said there was an urgent need for legal frameworks regulating AI-generated materials in tenders. The frameworks were needed to define authorship, verification duties and acceptable use, he said.

Upcoming shared cost training from GAMBICA explains how to use AI safely in bid-writing. To book your place, click [here](#).

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## Choose your productivity gain area at the GAMBICA conference

DESPITE ALL the hype on AI, it is clear that we are only at the start of this revolution which will affect the lab perhaps even more than any other area.

March's Lab Conference will not only inform you about the impact of AI on your future sales, it will empower you to profit from the revolution. You now have the option to participate in one of the four expert panels which will help you drive your productivity through AI.



They are:

- **AI for Sales** – led by *Jonathan Wagstaffe*, business coach and a Fellow of Cranfield University.
- **AI for Admin & Financial Reporting** – led by *Caroline Collings-Wood*, Innovate UK consultant and lab industry expert.
- **AI for Manufacturing** – led by *Daniel Smalley of Siemens*.
- **AI & Digitalisation for Service** – led by *Sharon Palmer*, lab service digitalisation expert.

Each panel will explore:

- Real-world experiences with AI
- Opportunities for growth and efficiency
- Barriers to adoption
- Practical solutions to move forward

The event will be held on 10th March 2026 at The Barnsdale Hall Hotel, Rutland Water. The conference is your AI and customer insight toolkit, designed to help you turn emerging technologies into practical, profitable solutions.

**What You'll Gain by attending:**

- **Hear from your customers on what they are expecting of you in the coming year.**
- **Clarity on AI:** Understand what AI can do for you—from sales and service to manufacturing and admin.
- **Actionable Strategies:** Learn how to implement AI effectively and avoid common pitfalls.
- **Peer Insights:** Share experiences and challenges with fellow lab professionals.
- **Expert Guidance:** Hear directly from industry leaders and specialists in digital transformation.



Flying in from Milan will be your keynote speaker, Nick Rosa, an award-winning professional specialist in digital transformation, innovation strategy, and creative technology with more than 20 years of experience. He has previously worked for Google, Spotify, IBM IX, Yahoo!, and Atari, and is now part of the Accenture Innovation team, where he serves as the Industry Technology Innovation Director for Europe and directs the Accenture Global Generative AI Studio for Consumer Products. Nick will deliver an AI overview, what it can do and how you should be using it and then explain how to plan your AI implementation to avoid the pitfalls.

Of course, the conference would not be the same without our expert forecasters, Anand Menon and Lee Hopley who will be on hand to give you the latest insights on politics, economics and trade.

The conference will be held at The Barnsdale Hall Hotel, Rutland Water on 10<sup>th</sup> March 2026 with the conference dinner taking place on the evening of Monday 9<sup>th</sup>.

**TO BOOK YOUR PLACE:** Click [here](#), or email [sarah.wicks@gambica.org.uk](mailto:sarah.wicks@gambica.org.uk)

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## **Worries recede slightly for suppliers of products containing PFAS**

THE EU body responsible for regulating the use of PFAS has released a document indicating which of the huge range of PFAS currently in use, will be the first to be restricted - only PFAS in domestic and 'commercial' refrigeration are on the list. The full document is available on the GAMBICA website, [here](#).

The European Commission has recently published a [public consultation](#) on a proposal to modernise and strengthen the basic Regulation covering ECHA operation. The consultation closes on 2 of December. A webinar has been run by ECHA to update interested parties on the PFAS restriction proposals, you can access it [here](#).

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## Proposal to lengthen phase out of FGASs

THE DEPARTMENT for Environment, Food & Rural Affairs (Defra) is consulting on a proposal to lengthen the phasedown of hydrofluorocarbons (HFCs) set out in the FGAS Regulations (Regulation on Fluorinated Greenhouse Gases).

The proposal is to revise the end target of the phasedown by replacing the 79% reduction by 2030 target with a 98.6% reduction by 2048 target.

The consultation closes on 17 December you can respond and find further information [here](#).

GAMBICA is developing a workshop for members needing to explore this topic in more detail. Speak to Jacqueline for more details 07990 016421.

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## Critical minerals strategy aims to find security for UK manufacturing

THE GOVERNMENT has issued a new national strategy setting out how the UK intends to secure long-term access to rare earths and other critical minerals after taking evidence from GAMBICA and its members on the impact of Chinese export restrictions on their businesses. The strategy responds to rising geopolitical risk, growing demand for magnet materials, batteries and semiconductor inputs, and increasing dependence on concentrated global supply chains.

The plan centres on growing domestic capability, diversifying international supply and accelerating reuse, recovery and circular-economy approaches. It highlights the need to reduce exposure to single-country suppliers, strengthen resilience in processing and mid-stream refining steps, and support innovation that lowers environmental impact.

Key measures include:

- **Support for UK exploration and responsible domestic mining**, focusing on deposits of rare earth elements, lithium and other strategic minerals.
- **Investment in UK refining, separation and magnet manufacturing**, with targeted grants and co-investment opportunities.
- **Partnerships with trusted international producers**, using trade agreements, diplomatic channels and long-term offtake arrangements.
- **R&D funding to improve recovery from end-of-life products**, including magnets, electronics and batteries, and support for recycling pilot plants.

To view the strategy, click [here](#).

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## LABORATORY Construction Update

### Building acquired for Oxford Science Park

THE OXFORD Science Park (TOSP), has announced the acquisition of Northbrook House, a 23,500 sq ft three-storey building, on the eastern side of the Park to be refurbished to provide laboratory space and write-up accommodation for science and technology start-ups with suites ranging from 3,600 to 23,500 sq ft.

## 10 pioneering health start-ups at Daresbury Laboratory

TEN PIONEERING health start-ups are tackling some of the world's toughest healthcare challenges, from lung cancer to eye disease, at the Science and Technology Facilities Council's (STFC) Daresbury Laboratory.

The companies are the latest to join STFC's Health Business Incubation Centre (Health BIC). According to Paul Vernon, Head of STFC's Daresbury Laboratory the Health BIC provides start-ups with a tailored support package worth up to £70,000, helping them turn breakthrough ideas into real-world healthcare solutions faster.



## Further boost for Liverpool's life sciences sector

LIVERPOOL CITY Region Combined Authority is planning to expand Sci-Tech Daresbury, the Liverpool City Region's national science and innovation campus. Up to £7.5 million in Life Sciences Innovation Zone funding is being sought to support the construction of a 23,000 sq.ft building, part of Project Violet Phase 2, which builds on the success of Phase 1 – completed in 2022 and now fully occupied.

Phase 2 includes a 60,000 sq.ft laboratory-enabled building, set to accommodate 150 high-skilled jobs, and a further 23,000 sq.ft of office and innovation space. If funding is approved, construction of both buildings will begin next summer.

## Green insecticides to be produced near Glasgow

SOLASTA BIO, which specialises in green insecticides, has moved to purpose-built facilities at the West of Scotland Science Park from the Glasgow University campus. Its first dedicated standalone facility, providing more than 4,000 sq ft of custom-fitted laboratory and office space for its 26 staff will facilitate further progress as the company since it was spun-out of the University in 2021. It secured an oversubscribed \$14 million Series A funding round in September 2024 and has achieved significant technical and regulatory milestones.

## Norwich Research Park expansion



CONSTRUCTION IS underway on the first new building at Norwich Research Park, funded by real estate investment manager Vengrove. Project GB1 is a 62,000 sq ft laboratory and office building designed to support the growth of companies in the agri-food, health and environment sectors, due for completion in January 2027, ready for tenants' fit-out. The development marks the first phase of a ten-year

investment partnership between Vengrove and Anglia Innovation Partnership, the campus management organisation for Norwich Research Park, which will deliver a series of new buildings to accommodate growing businesses on campus and attract new and established companies from across the UK and overseas. *Image: Vengrove.*

## Work starts £100m Manchester lab hub



CONTRACTORS HAVE broken ground on a 217,000 sq ft science and innovation building in the heart of Manchester's Knowledge Quarter. Kadans Science Partner is behind the £100m Plus Ultra Manchester scheme, which forms the centrepiece of the £450m Upper Brook Street masterplan, which includes 490,000 sq ft of mixed-use space with labs, student accommodation and community facilities.

## Wootton Science Park plans £44m for SME science and tech lab



HARTWELL PLC, the automotive and property development company, has received planning approval for a new carbon efficient laboratory and workspace buildings for small and medium-sized science and technology companies and amenities at Wootton Science Park to the south-west of Oxford. The £44 million masterplan will deliver circa 106,233 sq ft (9,869 sq m) across five new commercial

buildings and connected amenities.

## One of biggest science projects in history locates in Sweden



THIRTEEN NATIONS have come together to build one of the biggest science projects in world history in southern Sweden. The planned multi-billion-dollar mega-spallation lab will use a particle accelerator to generate nuclear reactions similar to what happens in a nuclear fission reactor. Fifteen scientific instrument labs are being built at ESS, across three halls to capture a specific type of data. The project's

Data Management and Scientific Computing Centre is located in Denmark. When it's fully up to speed, around 3,000 scientists from across Europe will use the facility. *Image courtesy of ESS.*

## €12.7m research facility opens in Co Wexford, Ireland



A NEW €12.7 million research facility that will focus on the environment and sustainability has opened in Co Wexford. The National Agricultural Sustainability Research and Innovation Centre (NASRIC) at Teagasc's Johnstown Castle site includes 2,000 square metres of new state-of-the-art labs and equipment. It will be used for research into water quality, soil health, greenhouse-gas emissions,

carbon farming, nutrient efficiency, and farmland biodiversity.



## UC Berkeley breaks ground on new lab



TURNER CONSTRUCTION, Bakar Labs, University of California-Berkeley, Gensler, and A Squared Solutions celebrated the groundbreaking of Bakar Labs for Energy + Materials, a new 146,000 sq-ft facility that will provide laboratory and collaboration space for energy and material technologies. The facility will feature advanced laboratories, 3D printing studios, meeting and conference rooms, and offices to support the growth of early-stage companies and research

initiatives. Construction is scheduled to continue until 2028.

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## GAMBICA Events

**GAMBICA ECONOMIC FORECAST | ONLINE | 10 DECEMBER 2025 | 09.30 – 12.00**

### How will the 2025 budget impact our industries?

JOIN OUR exclusive GAMBICA webinar, featuring expert analysis from Oxford Economics, to find out exactly what the budget means for the economy. Whether you're budgeting, investing, or planning for growth, this session will give you the clarity needed to make confident decisions. This isn't generic economics – it's tailored insight to help you future-proof your business.

**Order your copy of the report now, plus you'll also be automatically registered to attend the live webinar.**

*The report costs £240 +VAT for members and £540 + VAT for non-members.*

After you have registered for the report and webinar, each company will be able to reserve up to two further places on the live webinar. **To book your place, click [here](#).**

**COLLABORATE! 2026 | ENDRESS AND HAUSER, WYTHENSHAW | 15 JANUARY 2026 | 09.30 – 12.00**

JOIN THE GAMBICA University and Industry Collaboration Group (GUIC) at COLLABORATE! 2026. Discover how we bring industry and academia closer together to facilitate two-way engagement. The GUIC aims to influence curriculum, research, and policy to reflect real-world industry needs.

Attendees will hear from industry and academic leaders at the event. They will also get the opportunity to take part in round-table discussions and important networking sessions.

Keynote speakers:

- **Jonathan Mitchell**, Deputy Director Skills England,  
*Upskilling the workforce, the future of skills*

- **Richard Lamb**, Knowledge Transfer Partnerships Programme Manager, Innovate UK  
*The power of KTPs*

To reserve your place, click [here](#).

**BID WRITING INCLUDING BEST USE OF AI – SHARED COST TRAINING | GAMBICA OFFICES, LONDON | 27 JANUARY 2026 | 09.30 - 16.30**

WE ARE pleased to offer those who missed the previous shared cost training course on bid writing a second opportunity to elevate the quality and effectiveness of their bid submissions.

Building on core bid writing principles, the course will provide practical insights into crafting persuasive, well-structured, and compliant tenders. Delegates will explore strategies to improve win rates, including how to tailor responses to buyer priorities, avoid common pitfalls, and make best use of feedback.

In addition, the course examines how generative AI tools can be used ethically to support the bid writing process.

**For a full course outline and prices (which will depend on the number of delegates) email [jacqueline.balian@gambica.org.uk](mailto:jacqueline.balian@gambica.org.uk) or click [here](#) to reserve your place.**

**SELLING THROUGH DISTRIBUTORS – SHARED COST TRAINING | GAMBICA OFFICES, LONDON | 27/28 JANUARY 2026 | 09.30 - 17.30**

A COUPLE of places are still free on this shared cost training which normally costs £3600 per person but it is expected to cost around £900 per person if fully filled. Taught by lab industry experts, Sharon Eaton and Ludo Chapman, the four modules are:

<b>M 1   CHANNEL PARTNER SKILL DEVELOPMENT</b> <ul style="list-style-type: none"> <li>• The role model channel partner manager</li> <li>• Developing personal goals</li> <li>• Prioritising a focused workload</li> <li>• Managing v Leading skills</li> <li>• Communication &amp; listening skills</li> </ul>	<b>M 2   CHANNEL PARTNER MANAGEMENT PLANNING</b> <ul style="list-style-type: none"> <li>• Business plan development</li> <li>• Current situation audit &amp; gap analysis</li> <li>• Defining best partner profile for optimal coverage</li> <li>• Channel partner recruitment process</li> <li>• Planning and managing growth</li> </ul>
<b>M 3   MANAGING CHANNEL PARTNERS</b> <ul style="list-style-type: none"> <li>• Managing channel partner performance</li> <li>• Managing targets and sales funnels</li> <li>• Business reviews with your channel partners</li> <li>• Managing channel conflicts</li> <li>• Managing under-performance, recovery &amp; termination</li> </ul>	<b>M 4   INFLUENCING CHANNEL PARTNERS</b> <ul style="list-style-type: none"> <li>• Assessing capability and willingness</li> <li>• Managing power imbalances</li> <li>• Channel partner motivation</li> <li>• Constructive feedback</li> <li>• Developing trusting relationships</li> </ul>

Click [here](#) to register your interest.

## THE GAMBICA LAB CONFERENCE 2026 | THE BARNSDALE, RUTLAND | 9-10 MARCH 2026

### YOUR AI & CUSTOMER INSIGHT TOOLKIT FOR THE YEAR AHEAD

**THE GAMBICA Lab Conference 2026 will turn AI hype into your practical advantage. This year's summit will cut through the noise, showing you how peers are already applying AI—and how you can integrate it into your business with less cost, less pain, and more impact.**

#### HEADLINE KEYNOTE: NICK ROSA, ACCENTURE



Nick Rosa brings over 20 years of digital transformation and innovation expertise. With a career spanning Google, Spotify, IBM IX, Yahoo!, and Atari, Nick now leads as *Industry Technology Innovation Director for Europe* and directs the *Accenture Global Generative AI Studio for Consumer Products*.

Nick will deliver a clear-eyed overview of AI: what's possible today, how to spot the pitfalls, and the roadmap you need to implement AI successfully in your organisation.

#### CUSTOMER PERSPECTIVES: WHAT BUYERS WANT IN 2026

Hear from Laura Williams, Data Capability Leader at GSK, on how your customers are upskilling for the digital revolution—and what they expect from their suppliers. You'll also gain direct insight from other leading customers about their buying priorities for the year ahead.

#### NEW FOR 2026: PEER-TO-PEER AI BREAKOUTS

This year, it's not just about listening— you will have the chance to dive into focused discussions with your peers, exploring specific applications of AI, the barriers you'll face, and how to overcome them. Choose your AI focus area in advance and leave with actionable ideas tailored to your business.

#### EXPERT FORECASTING: POLITICS, ECONOMICS, TRADE

Anand Menon and Lee Hopley will again bring their sharp insights into the political and economic landscape, equipping you with the intelligence you need to navigate 2026 with confidence.

**BOOK ONLINE [HERE](#) OR CONTACT SARAH [SARAH.WICKS@GAMBICA.ORG.UK](mailto:SARAH.WICKS@GAMBICA.ORG.UK) TO RESERVE  
YOUR SPOT AND TAKE ADVANTAGE OF EARLY BIRD RATES.**

### EXPORT TRAINING DISCOUNTED FOR GAMBICA MEMBERS | ONLINE | DEC 25-MAR 26

EXPORT TRAINING is available to GAMBICA members from Chamber International at Chamber members' prices.

**A range of courses is listed below:**

## DECEMBER 2025 TO MARCH 2026 COURSES

11 Dec 2025	<u><a href="#">CBAM Masterclass: Policy, Transition and Compliance</a></u>
12 Dec 2025	<u><a href="#">Customs Special Procedures</a></u>
12 Dec 2025	<u><a href="#">Shipping to and from China</a></u>
17 Dec 2025	<u><a href="#">Shipping to and from Northern Ireland</a></u>
15 Jan 2026	<u><a href="#">Understanding Exporting &amp; Incoterms®</a></u>
17 Jan 2026	<u><a href="#">VAT in International Business</a></u>
22 Jan 2026	<u><a href="#">Workshop for Export Administrators</a></u>
22 Jan 2026	<u><a href="#">Shipping to and from the US</a></u>
29 Jan 2026	<u><a href="#">Customs Declaration Service (CDS) for Imports</a></u>
10 Feb 2026	<u><a href="#">Shipping Lithium Batteries by Air, Road, &amp; Sea</a></u>
12 Feb 2026	<u><a href="#">Customs Declaration Service (CDS) for Exports</a></u>
18 Feb 2026	<u><a href="#">Rules of Origin, Trade Agreements and Commodity Codes</a></u>
19 Feb 2026	<u><a href="#">Export Documentation &amp; Import Procedures</a></u>
5 Mar 2026	<u><a href="#">Importing and Customs</a></u>
5 Mar 2026	<u><a href="#">HMRC Audits &amp; Customs Record Keeping Requirements</a></u>
11 Mar 2026	<u><a href="#">Incoterms® - The Basics</a></u>
19 Mar 2026	<u><a href="#">Export Documentation</a></u>

FURTHER INFORMATION is available [here](#). When booking, quote discount code 'CICSP25' to get your 10% discount. TO BOOK your place click [here](#).

## INDUSTRY Events

### WHX LABS | DUBAI | 10/13 FEBRUARY 2026

FORMERLY MEDLAB Middle East, GAMBICA offers a pavilion at this exhibition. For more information about this event click [here](#).

### MATERIALS RESEARCH EXCHANGE | LONDON | 18-20 FEBRUARY 2026

MATERIALS RESEARCH Exchange 2026 is run by Innovate UK and will offer new insights and strategies on materials research and innovations in the UK and the opportunity to network and collaborate with key industry users and investors. **For more information click [here](#).**

### ANALYTICA | MUNICH | 24/27 MARCH 2026

WE RECEIVED a good number of early bookings for Analytica 2026, and availability is already limited. We are offering two options for participation with the GAMBICA UK pavilion: 'regular' pavilion stands of 6+sqm & 4sqm 'pod' stands. Please contact Kirsty if you wish to discuss availability.

**For more information about the event itself please click [here](#). To book your stand contact Kirsty at [Kirsty.roberts@gambica.org.uk](mailto:Kirsty.roberts@gambica.org.uk)**



BOOKING DETAILS will be available later this year for the GAMBICA pavilion at this event.  
For more information about the event click [here](#).

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## **EXPORT News**

### **New event director seeks to slow long downhill slide at Medica**

MEDICA 2025 failed to break the trend of recent years and once again there were fewer exhibitors and growing gaps in every hall. With footfall feeling lower than last year, exhibitors were agreed that something needs to happen if the event is to regain its previous popularity.

Newly appointed head of MEDICA, Carmen Berger, remains positive and commented: “On the supply side, the conditions are excellent. The industry has enormous growth potential that is just waiting to be unleashed.”

Figures she offered for the exhibition included:

- 5,300 exhibitors from 70 nations
- 78,000 trade visitors from 160 countries
- buyer delegations from the Gulf States, Africa, and the UK's NHS.

Acknowledging the need for change however, she announced a plan to adjust the main topics of the next event in line with interviews conducted during the trade fair.

Detail on plans to re-juvenate the event are scarce but early indications are that there are plans to increase the educational content of the show – which is of interest to primarily to those exhibitors looking for end users rather than distributors or other parts of the industry.



#### **Views from the GAMBICA pavilion**

It was universally felt by our UK exhibitors that the event would be better if it lasted three rather than four days. This would go some way to limiting the costs of the event given the high costs of hotels, taxis and meals in Dusseldorf.

Cutting costs for visitors was also a popular idea, especially among visitors seeking new distributors. The entry cost for the event raised as a possible cause of distributors limiting their visits to one or two days only. The cessation of free travel for those participating in the exhibition was felt to have compounded this effect.

Others pointed to the withdrawal of the larger companies from the show as making it less useful for those with product innovations which they want to sell throughout the lab ecosystem.

One suggestion which found favour with GAMBICA is to ally the scale of the Dusseldorf event, with the growing trend for exhibitors to seek out highly specialised events catering precisely for the audience it wishes to meet. Given the number of spaces in all the halls, and the need to empty Hall 9 which is to be renovated over the next three years, now might be the time to give each hall a clearer identity and offering, to try to attract greater specialist audiences. This would present new marketing opportunities, potential to increase footfall, and provide new attractions for the event which might make it more interactive and entertaining.

### **Chinese exhibitors increase**

This year Chinese exhibitors were hugely prevalent at the show with estimates of up to 25% of all exhibitors being from China. The true figure may be even higher as there were huge stands in almost every hall bearing the title: 'Canada trading' which appeared to be entirely staffed by Chinese staff.

Many exhibitors were discussing the relative benefits of Medica versus Medlab (now WHX) in Dubai. The feeling is clearly growing that of the two events, Dubai offers the opportunity to meet buyers from a wider geographic region, and that the high costs of staying in Dusseldorf now make the events comparable in price, with Dubai offering a more attractive climate.

The average mark accorded to the event by exhibitors this year was still 7 out of 10 with just over half of GAMBICA's exhibitors saying they would exhibit again, with the rest saying they might consider taking a smaller space or walking the floor with exhibiting likely only if their final results from this year justify the expenditure.

Clearly, UK companies are becoming ever-more choosy about the events they support and unless something significant happens to improve the value represented by Medica, its current trajectory can only continue.

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## **US lab companies shell-shocked by Trump tariffs**



INDUSTRY COMMENTARY in the latest *Instrument Business Outlook* (a review of the lab market produced in the US) highlights widespread concern about the impact of the US tariffs on the global laboratory tools sector. A spokesman for the Analytical, Life Sciences and Diagnostics Association, ALDA, said: that the new US tariffs are having a disruptive and costly impact on their members. "With globally connected supply chains and multi-country sourcing, assembly and

manufacturing, laboratory tool companies' operations are being deeply affected. In the

short term, tariffs have made everything more expensive, from components to finished instruments. Many members are seeing tighter margins, increased production costs, and in some cases, delayed customer purchases. These added costs are hitting hardest where companies rely on cross-border manufacturing or imported materials.”

German sales in the US are also being affected. “The new US tariffs are putting noticeable pressure on the export business of the German analytical, biotech and laboratory technology industry. The United States is the most important export market for this sector, so the measures introduced there have significantly greater relevance than in other regions,” said a spokesperson for German Lab Trade Association, Spectaris. “Overall, business activity in the US is expected to weaken this year.”

European, Japanese and Swiss associations similarly reported heightened uncertainty, though many expect stabilisation in 2026. German industry data show modest growth in 2024 followed by an anticipated decline in 2025. Exports in early 2025 fell to the US and China but increased to parts of Europe. Demand across Asia was weak due to reduced Chinese purchasing. New US tariffs are pressuring German exporters, and many companies are pursuing efficiency measures, supply-chain diversification and relocation of some manufacturing. French organisations noted that US tariff updates are increasing landed costs for China-origin inputs and accelerating dual sourcing outside China.

Japanese companies with high US exposure reported notable tariff effects, prompting increases in US factory capacity and inventory. Longer-term plans include more US manufacturing, product launches targeted at the US market, and stronger emphasis on recurring revenue. Most firms are not considering leaving the US despite expectations of prolonged trade frictions. US companies have begun diversifying suppliers, investing in regional manufacturing and identifying alternative sources.

Across Europe, consequences of US tariffs are expected to be long-term, including higher customer prices and greater adoption of China-plus-one sourcing strategies.

EU industry remains concerned about forthcoming obligations under the Carbon Border Adjustment Mechanism which, from 2026, will impose certificate costs on carbon-intensive inputs such as metals and chemicals, prompting redesign efforts and shifts toward lower-carbon supply chains. CBAM-related input costs are expected to prompt incremental price increases.

In addition to tariffs, US government and academic funding delays have significantly reduced laboratory capital spending. US organisations reported slower ordering cycles, extended use of existing instruments and increased demand for refurbished equipment, service contracts and flexible finance options. If funding constraints continue, weakened purchasing could extend into 2026.

Despite near-term challenges, most organisations anticipate gradual improvement. German sources expect recovery once funding clarity returns and research priorities are defined. French observers foresee the possibility of a back-loaded rebound in capital investment if European public budgets stabilise. Without such stabilisation, companies are expected to shift further towards pharmaceutical, biotech, industrial and clinical markets to offset weakness in academic demand.

Some European commentators noted deeper underlying issues, including reduced trust in scientific institutions and defunding of research centres, which could hinder early-stage

innovation typically originating from academia. Globally, expectations for 2026 are cautious. Life-science-focused companies, particularly those linked to pharmaceutical and diagnostic markets, are relatively optimistic, whereas more diversified suppliers are planning conservatively. Industrial and environmental customers continue to demonstrate caution, but steady demand with modest growth is generally expected.

Forecasts from industry groups point to low-to-mid single-digit global growth in 2026, with life-science capital improving from 2025 lows and consumables showing more stable patterns.

Japanese organisations anticipate steady improvement driven by innovation, personalised medicine, advanced analytics, regulatory compliance, regenerative medicine, cell therapies and demographic change.

Regional outlooks emphasise Asia as a growth area, particularly the rising demand in China's pharmaceutical and food sectors, orders from Southeast Asian manufacturing hubs, and sustained strength in South Korea and Taiwan's semiconductor industries. Growing GDP across several Asian nations was also cited as a positive indicator. Others plan to track the impact of China's economic policies on market conditions. European demand is expected to be stable to modestly positive, with pharmaceutical, biotech, clinical and regulated quality-control markets underpinning spending, though tariffs may continue to influence competitive outcomes.

Some regional analysts expect Germany to begin recovering from prolonged economic softness in 2026. Long-term studies of the German sector indicate that analytical, biotechnology and laboratory technologies are among the country's most resilient and future-oriented industries, benefitting from trends in digitalisation, automation, artificial intelligence and sustainability.

All major trade organisations agree that Chinese analytical instrument suppliers are becoming increasingly competitive, particularly in lower and mid-price segments. US companies report heightened price competition from fast-scaling Chinese manufacturers supported by national policy incentives. Responses include sharper pricing, increased local presence, partnerships with domestic firms and a focus on higher-end products. German companies are countering with quality differentiation, validation strategies, stronger service offerings and local assembly in key markets. While exports to China have declined, imports from Asia have increased.

Manufacturing location remains a critical strategic factor. Japanese firms reported that maintaining core, proprietary component manufacturing domestically while conducting final assembly in China allows them to balance export-control compliance with local-market access. At the same time, development and manufacturing within China are often aligned with preferential industrial policies, especially in pharmaceuticals and decarbonisation-related measurement technologies.

Overall, commentators felt that the global laboratory tools industry is navigating a period of substantial structural pressure driven by tariffs, supply-chain realignment, regulatory change, variable public funding and intensifying competition from China. However, most organisations anticipate modest improvement from 2026, with life-science sectors expected to lead the recovery.

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## Sanctions designations moved to a single list

THE OFSI Consolidated List of Asset Freeze Targets is closing on Wednesday 28 January 2026. From then on the UK Sanctions List will be the only source for all UK sanctions designations. There will be no changes to the structure of the current UK Sanctions List. Guidance has been published on the change [here](#).

The UK Sanctions List from FCDO lists which people, entities and ships are designated or specified under the Sanctions and Anti-Money Laundering Act 2018, and why.

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