

Industry profile

Medical technology

In brief

With total annual sales of over 34 billion euros*, the medical technology industry in Germany is an important and steadily growing cornerstone of the German economy. The approximately 1,450 companies with more than 20 employees provide over 152,000 jobs. If micro and commercial enterprises are included, the industry totals around 12,000 companies with more than 236,000 employees.

Industry structure

The German medical technology industry is strongly characterized by small and medium-sized enterprises. Around 95 % of the approximately 1,450 medical technology companies have fewer than 250 employees. Just under 1,000 companies have between 20 and 50 employees. Most companies are located in Baden-Württemberg (274), North Rhine-Westphalia (257) and Bavaria (193). The export ratio of the industry is almost 66 % on average.

Companies

A list of medical technology companies organized in SPECTARIS can be found at:
www.spectaris.de/medizintechnik/mitglieder

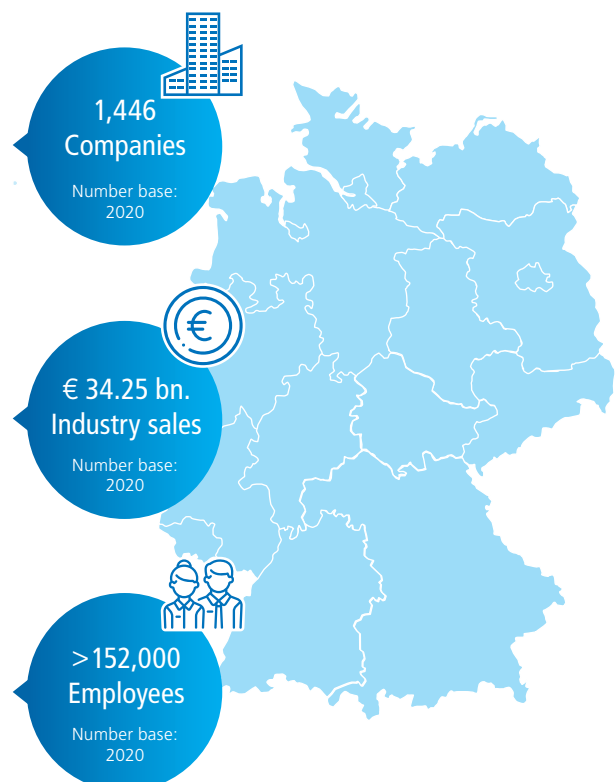
Product categories of the medical technology companies organized in SPECTARIS

- Medical supply systems/ med. complete solutions/emergency medicine
- Surgical instruments/measuring instruments/examination instruments
- Implants
- Large and small sterilisers
- Ophthalmological diagnosis
- Medical aids for respiratoric care
- Medical aids for orthopaedic technology and rehabilitation
- Medical aids for Life Sciences und others
- Hospital/Nursing beds

Customers and markets

- Hospitals
- Medical and dental offices and other health care facilities
- Medical supply store / drugstore
- Retirement and nursing homes
- Private individuals (medical aids)

* Figures for 2020



Opportunities, challenges, trends

The German medical technology industry faces great opportunities, but also great challenges. The industry is concerned about increasing overregulation, particularly as a result of the new European Medical Device Regulation. Many companies expect this to jeopardize further sales and employment growth.

On the other hand, there are opportunities arising from demographic developments, particularly in the mature economies, and from high levels of healthcare investment in many emerging countries. The market is also being driven by the increasing importance of health as a commodity and by new and further technological developments. The biggest factor currently influencing the industry is digitization. The healthcare industry is undergoing a rapid process of change. Digitalization is already touching all areas of care. As a result, the business model of manufacturers is also changing: from the classic provider of device technology in the last decade to the solution provider in the current decade to the provider of digital and holistic healthcare solutions in the coming decade. In order to tap the full potential of this change, the framework conditions of Germany as a lead market must be optimized and the shortage of skilled workers must be resolutely addressed.

In view of an export ratio of almost 66 percent, foreign business is of great importance. Due to the Corona pandemic and the associated lockdowns in many target markets, during which the majority of international busi-

ness came to a complete standstill, exports in 2020 were significantly weaker than in the previous year. The most important target countries for German medical technology exports remain the USA and China, with export shares of 18 and nine percent respectively. The countries of the European Union accounted for 41 percent of exports. Demand from Russia, in ninth place in the target country ranking with three percent, continued to gain momentum (plus ten percent).

Based on the aforementioned factors influencing the markets, medical technology is expected to continue its growth trajectory in 2021 and beyond. Experts forecast an average annual increase in the global market for medical technology of around five percent in the coming years. The market size is expected to reach a value of around 550 billion U.S. dollars in 2023. German medical technology, which is highly innovative, well positioned and internationally competitive, will benefit from this development and continue on its growth path.

Further information

- Jahrbuch Medizintechnik 2021/22
https://www.spectaris.de/fileadmin/Content/Medizintechnik/Zahlen-Fakten-Publikationen/SPECTARIS_Jahrbuch_2021-2022_Lesezeichen.pdf
- Talking-Cards „Eine deutsche Hightech-Branche in Zahlen“: <https://www.spectaris.de/fileadmin/Infothek/Medizintechnik/ePaper-talking-cards-medizintechnik/index.html#0>

Medical technology	2017	2018	2019	2020	Dev. 2020/19
Total sales (€ bn.)	29.93	30.28	33.41	34.25	+2.5 %
Domestic sales (€ bn.)	10.85	10.49	11.46	11.72	+2.3 %
Foreign sales (€ bn.)	19.08	19.79	21.95	22.53	+2.6 %
Export rate (%)	63.7	65.4	65.7	65.8	+0.2 %
Employees (Thousand)	137.9	143.2	148.8	152.1	+2.2 %
Companies	1,310	1,352	1,375	1,446	+5.2 %

Companies with 20 employees and more; Source: SPECTARIS, Federal Statistical Office of Germany



Contact

Marcus Kuhlmann | Head of the Medical Technology Association
Tel. +49 30 41 40 21-17 | Email kuhlmann@spectaris.de | www.spectaris.de

SPECTARIS e.V. | Werderscher Markt 15 | 10117 Berlin | Germany