

Industry profile

Medical technology

In brief

With a total annual turnover of over 36 billion Euro* is the medical technology industry in Germany important and constantly growing cornerstone of the German business. The approximately 1,450 companies with more than 20 employees provide over 154,500 jobs. If you count the micro and trading companies, comes the industry to a total of around 12,000 companies with more than 252,000 employees.

Industry structure

The German medical technology industry is strongly medium-sized shaped. Around 93 % of the approximately 1,450 medical technology companies have fewer than 250 employees. Almost 1,000 companies have a number of employees between 20 and 50. Most companies are in Baden-Württemberg (284), NRW (261) and Bavaria (198). The sector's export rate is average almost 66 %.

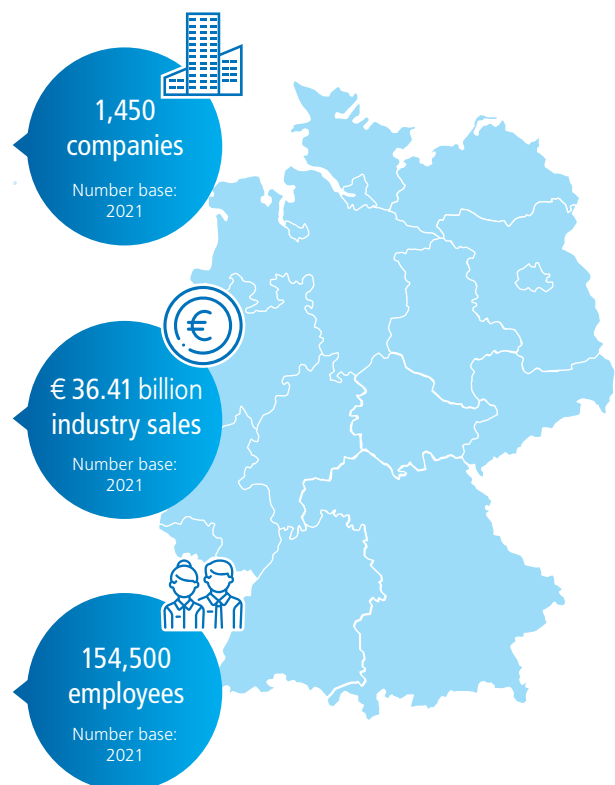
Product categories at SPECTARIS organized medical technology companies

- Medical supply systems/medical complete solutions/emergency medicine
- Surgical instruments/measuring instruments/investigative tools
- Implants
- Large and small sterilizers
- Ophthalmic devices
- Aids for home respiratory therapy
- Aids for orthopedics and rehabilitation
- Aids for life sciences and others
- Hospital/care beds

Customers & markets

- Hospitals
- Medical and dental practices and other healthcare facilities
- Medical supply trade
- Retirement and nursing homes
- Privat individuals (aids)

* Figures for 2021



Opportunities, challenges, trends

The medium and long-term drivers of the medical technology market are intact. These include, for example, the opportunities arising from demographic developments, particularly in the mature economies and through high investments in health in many emerging countries. Also the further increasing importance of the good health and technological new or further developments ensure demand impulses. The Corona crisis has a frightening way demonstrated the importance of health systems have for society. thereby become these long-established trends strengthened. In order to unlock the full potential of this change can be, the framework conditions must optimized in the lead market of Germany and the shortage of skilled workers be met with determination. Current is the medium-sized medical technology and Germany as a location for innovation more than ever under pressure: supply chain disruptions, rising material, energy and logistics costs, the effects of war in Ukraine and an overall difficult economic situation environment burden the business. to be added increasingly complex and bureaucratic sustainability requirements paired with foreseeable material ones Prohibited or Restricted. This represents for many companies are in an extreme economic situation represent, which not only leads to economic upheaval can lead, but also the security of supply with medical devices in question. If it weren't already enough, the EU Medical Devices Regulation (MDR) brings many, not just smaller manufacturers, to their limits and massively damages innovative strength the industry.

In view of an export rate of more than 66 percent, foreign business is of great importance. The most important target countries for German medical technology

exports remain the USA and China with export shares of almost 18 and nine percent. While exports to the US increased by 12 percent in 2021, demand from China only fell by a moderate three percent. The reason was the ongoing lockdowns due to the corona pandemic. On the countries of the European Union, the largest target region for German medical technology exports, accounted for 39 percent of exports.

According to preliminary information, the industry generated an increase in sales of around five percent in 2022. Because of of the aforementioned market drivers is to be expected that medical technology will continue on its growth course becomes. However, sales growth is currently on double-edged sword, because it will cost increases accompanies, resulting in the earnings situation recently deteriorated significantly. Especially since you can Rising healthcare costs due to of the tight corset in which market participants find themselves move to a budgeted healthcare system in which Usually not as easy as in other industries kill customers. Forecast for the coming years Frost & Sullivan an average annual Growth of the global medical technology market in the mid single digit range. The participation of the Germans Medical technology industry at this potential is increasing from the European legal framework and a positive one Innovation and investment climate in Germany depend.

Further Information

- A german high-tech industry in figures: www.spectaris.de/fileadmin/Content/Medizintechnik/Zahlen-Fakten-Publikationen/spectaris_the_medtech_industry_flyer_web.pdf

Medical technology	2018	2019	2020	2021	Diff. 2021/20
Total sales (billion €)	30.28	33.41	34.25	36.41	+6.3 %
Domestic sales (billion €)	10.49	11.46	11.72	12.21	+4.2 %
Foreign sales (billion €)	19.79	21.95	22.53	24.20	+7.4 %
Export rate (%)	65.4	65.7	65.8	66.5	+1.0 %
Employees (thousand)	143.2	148.8	152.1	154.7	+1.7 %
Companies (number)	1,352	1,375	1,446	1,446	-0.2 %

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



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