MEDICAL TECHNOLOGY
in the German Industry Association
SPECTARIS

Industry profile

Medical technology

In brief

With a total annual turnover of more than EUR 33 billion*, the medical technology industry in Germany is an important and constantly growing cornerstone of the German economy. The more than 1,375 companies with over 20 employees provide over 149,000 jobs. If you count small companies and retail companies, the industry has a total of 12,500 companies with more than 210,000 employees.

Industry structure

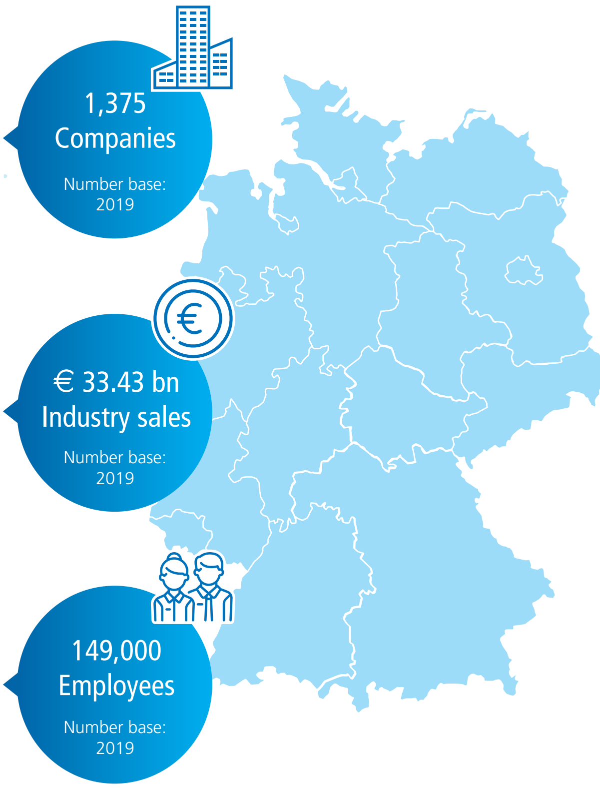
The German medical technology industry is strongly characterised by medium-sized companies. Around 95% of the approximately 1,375 companies have fewer than 250 employees. Almost 900 companies have fewer than 50 employees. The majority of companies are located in southern Germany (around 450) and North Rhine-Westphalia (around 230). The sector's export rate averages almost 66%.

Companies

The list of selected MedTech companies that are members of SPECTARIS can be found at:
www.spectaris.de/medizintechnik/mitglieder

Products & technology

- Medical supply systems/med. complete solutions/ emergency medicine
- Sleep apnoea respiratory treatment device, oxygen concentrators and other devices for respiratory treatment at home
- Ophthalmological diagnosis
- Surgical instruments/measuring instruments/ examination instruments
- Medical aids
  (e.g. for rehabilitation, orthopaedic technology)
- Hospital/nursing beds
- Large and small sterilisers
- Implants



Customers & markets

- Hospitals
- Medical practices and other health facilities
- Sanitary supplies
- Retirement and nursing homes
- Private individuals (medical aids)

* Figures for 2019

Opportunities, challenges, trends

The German medical technology sector is facing great opportunities, but also great challenges. The industry is concerned about increasing over-regulation, particularly due to the new European Medical Device Regulation. Many companies expect this to jeopardise further sales and employment growth.
On the other hand, there are opportunities due to demographic development, particularly in mature economies, and due to high health investment in many emerging countries. The growing importance of health and new or further technological developments are also driving the market. Digitalisation is currently the biggest influencing factor for the industry. The healthcare industry is undergoing a rapid process of change. Digitisation already affects all areas of care. As a result, manufacturers' business models are also changing: From classic providers of device technology during the last decade, to the solution providers in the current decade, to providers of digital and holistic health solutions in the coming decade. In order to tap the full potential of this change, the framework conditions of the leading market, Germany, must be optimised and the shortage of skilled workers resolutely countered.
In view of an export quota of almost 66 %, international business is of great importance. Around 42 % of German medical technology was exported to European Union countries in 2018. The robust demand trend in these countries was therefore an important basis for the growth of the industry.
Looking ahead, it is expected that sales growth in European countries will lose momentum as a result of the new medical device regulation. Demand from North America rose again in 2018. However, the growth rate was comparatively weak at 3 %. In contrast, exports to China developed very positively and recorded a high plus of 12 %. After an increase in exports to Russia of almost 28 % in 2017, the development in 2018 was somewhat weaker, with an increase in 4 %, but still positive.
Due to the market drivers mentioned above, manufacturers' expectations for the coming years is largely positive, even if growth slows down against the background of the economic development of the global economy, the overregulation outlined and in particular the consequences of COVID-19. Experts forecast (prior to COVID-19) an average annual increase in the medical technology global market of around 5.6 % (prior to COVID-19) for the coming years. The market size is expected to reach 595 billion US dollars in 2024. German medical technology, which is highly innovative, well positioned and internationally competitive, will continue to benefit from this development.

Further information

- SPECTARIS Yearbook Medical Technology 2019/20 https://www.spectaris.de/fileadmin/Content/Medizintechnik/Zahlen-Fakten-Publikationen/SPECTARIS_Jahrbuch_2019-2020_EN_02-2020_WEB.pdf
- SPOTLIGHT Medical Technology, June 2020: https://www.spectaris.de/fileadmin/Content/Medizintechnik/Zahlen-Fakten-Publikationen/Spotlight_Medical_Technology_2020.pdf

Medical technology	2016	2017	2018	2019	Dev. 2019/18
Total sales (€ bn.)	29.19	29.93	30.28	33.41	+10.3%
Domestic sales (€ bn.)	10.58	10.85	10.49	11.46	+9.3%
Foreign sales (€ bn.)	18.61	19.08	19.79	21.95	+10.9%
Export rate (%)	63.7	63.7	65.4	65.7	+0.5%
Employees (Thousand)	132.7	137.9	143.2	148.8	+3.9%
Companies	1,258	1,310	1,352	1,375	+1.7%

2019: provisional values; companies with 20 employees and over; data contains rounding differences. Due to a changed calculation basis the values for domestic and total sales in 2018 and 2017 are only comparable to a limited extent. Source: SPECTARIS, Federal Office of Statistics

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