Stuttgart, Germany 2026

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Your Gateway to the Medtech Supply Industry

Medical Technology as a Future Field:

Technologies, Markets and Strategic Options

The industry report for MedtecLIVE 2026, 5-7 May 2026

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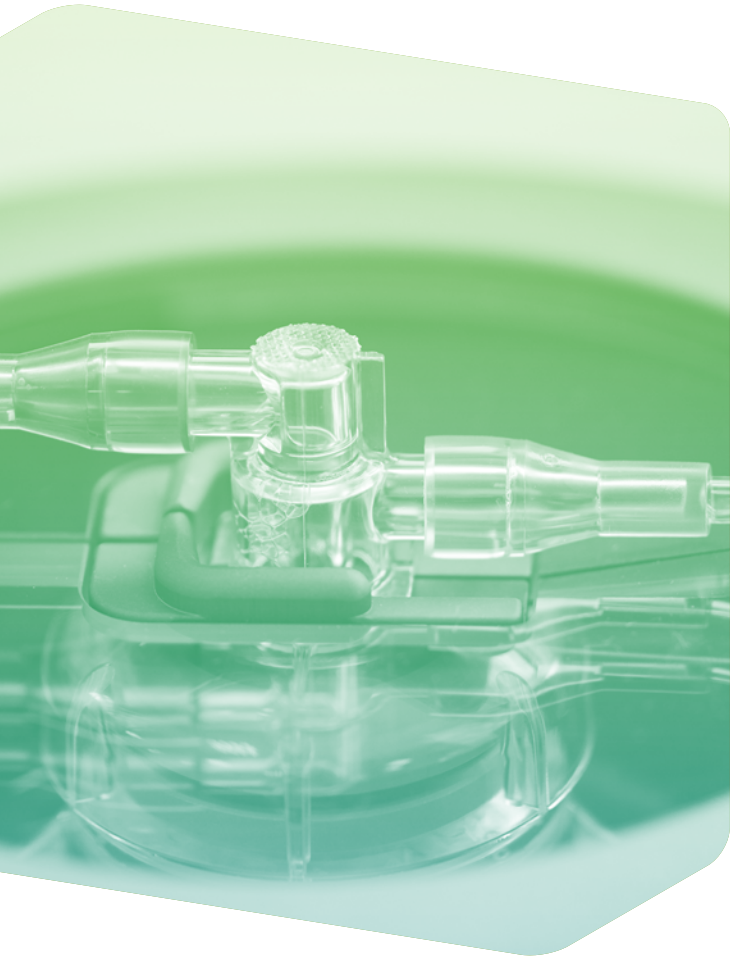

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#1

Foreword

Medical technology is a cornerstone of the industrial healthcare sector. It keeps healthcare systems operational, drives technological innovation and secures value creation in Germany, across Europe and beyond. At the same time, the sector is under pressure: costs are rising, regulation is increasingly complex, skilled labour is in short supply, and global competition is intensifying.

This industry report addresses **key strategic questions for the years ahead**: where are the most robust drivers of growth? What role do efficiency and better systems play? What can digitalisation, automation and artificial intelligence actually deliver—and what can they not? How can international markets be developed without losing connection to the domestic base? And how can sustainability be achieved without undermining competitiveness?

The answers to these questions are grounded in data from studies and industry association materials, as well as in discussions with market insiders from associations, companies, networks, institutions for innovation and location development, and the commercial healthcare sector. Their expert perspectives run throughout the report, creating a coherent picture that brings together market data and opportunities, corporate strategies and systemic considerations.

The report is structured into seven chapters. It begins by outlining **medical technology as a growth market**, then examines questions of effectiveness and efficiency, explores the contribution of **digitalisation, automation and AI**, assesses **internationalisation** and export opportunities, discusses **sustainability** as a competitive factor, and shows why medical technology represents an attractive point of entry for other industries. It concludes with an outlook for the years ahead.

We invite you to consider medical technology in the context of healthcare systems, industry and society—and to use this report as a basis for your own decisions.

MedtecLIVE 2026, taking place in Stuttgart from 5 to 7 May, provides the space to take these questions further, share experience and initiate new collaborations. The event brings together developers, suppliers, manufacturers and professionals from across the entire value chain, offering direct access to technologies, projects and decision-makers. For those planning their next steps in medical technology, it serves as a source of orientation, potential partners and practical starting points for implementation.

Silke Ludwig
Deputy Director MedtecLIVE

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#2

The Medical Technology Market:
Growth Needs Strategy

Medical technology is one of the fastest-growing and most innovative industries globally. Demographic change, technological progress and the growing expectation of longer lives in good health are creating a stable and resilient demand base. Despite cost pressures in healthcare systems, regulatory challenges and geopolitical tensions, the sector remains on a long-term growth trajectory.

An industry with global weight

The European market reached a volume of around €170 billion in 2024. Germany, with revenues of approximately €55 billion, is the largest single market in Europe and one of the world's leading manufacturing and export hubs. Around 68 per cent of medical technology revenue is generated from international business. More than 210,000 people are employed in the sector, predominantly in highly qualified and strongly research-intensive roles.

Global market volume now stands well above US$600 billion, according to industry analyses. Annual growth rates remain stable at between five and seven per cent. Unlike cyclical industries, this growth is not driven by short-term economic fluctuations, but by long-term structural shifts.

European market volume: EUR 170bn

Europe is the second-largest medical technology market globally, with a volume of around €170 billion.

Source: MedTech Europe: Facts & Figures

Average annual growth: ø 5.4%

Over the past ten years, the European medtech market has grown at an average annual rate of 5.4%.

Source: MedTech Europe: Facts & Figures

Employment in Germany: 210,000+

In 2024, the medical technology industry in Germany employed a total of 212,100 people.

Source: GGR (WifOR): Wirtschaftsstatistik

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Demographics and disease burden

By 2035, the share of people aged 65 and over in Europe is projected to reach around 25 per cent, according to calculations by Eurostat. As populations age, the utilisation of medical services rises significantly. Demand for diagnostics, implants, monitoring systems and robot-assisted procedures is therefore increasing on a structural basis.

At the same time, the prevalence of chronic diseases is rising worldwide. Cardiovascular diseases, diabetes, cancer and respiratory conditions are among the most common and cost-intensive disease patterns in almost all industrialised countries. Medical technology directly addresses these areas—for example through early detection, minimally invasive procedures, more precise imaging and continuous monitoring.

Shift towards outpatient care and home-based provision

At the same time, the logic of care delivery is changing. Services that were once provided exclusively in hospitals are increasingly being delivered in outpatient settings or through digitally supported home-care models.

Inpatient care is labour-intensive and costly. Outpatient structures and digital monitoring systems enable more efficient processes and better utilisation of medical professionals. For the medical technology sector, this means that products must become smaller, more connected, suitable for mobile use and more user-friendly.

From products to integrated solutions

This shift is transforming not only products, but also business models. Value creation is increasingly driven by the interaction of devices, data, services and their integration into care pathways.

Dr Marc-Pierre Möll, Managing Director of BVMed, describes the current development as a structural evolution of the sector. Medical technology is becoming increasingly embedded in broader care contexts. Standalone products are no longer sufficient; what is required are solutions that integrate into existing workflows and are economically viable.

At the same time, he emphasises Europe's industrial strength: "The European market is demanding, but it offers reliable structures and a high willingness to innovate." Companies that succeed here are internationally competitive.

"The European market is demanding, but it offers reliable structures and a high willingness to innovate."

Dr Marc-Pierre Möll
Managing Director, BVMed

Responsibility as a strategic dimension

Dr-Ing. Michael Ott, Head of Technology Catalyst & Sustainability at Siemens Healthineers, shifts the focus from a purely market-driven logic to corporate responsibility as a strategic task. “Stakeholders in medical technology bear responsibility for how their products, materials and business models impact people, the environment and healthcare systems. Health is not created by technology alone, but through the use of healthy materials, functioning cycles and life-supporting conditions.”

Medical technology thus becomes a meaningful field of activity when products are designed from the outset in such a way that they contain no harmful substances, can be used safely in clinical practice, and their materials remain available as high-quality resources after use. Companies that consider material health, circularity and systemic impact together not only strengthen their environmental responsibility, but also their resilience, the acceptance of the sector and their legitimacy in public discourse.

Health as an investment

In this context, the question arises of how much a society is willing to invest in health. While the medical technology market is growing structurally, healthcare systems—particularly in Germany—are under significant financial pressure. Social insurance contributions are rising, yet efficiency gains are only being realised slowly. Skills shortages, increasing demand for care and economic constraints coincide with political reluctance to make long-term investments.

Prof. Dr med. Tobias Gantner, physician, entrepreneur and a leading voice in the digital transformation of healthcare, sees this as a fundamental issue and calls for a shift in perspective: “Healthcare expenditure must not primarily be understood as consumption, but must be regarded as an investment: in the health of the population, in infrastructure, in jobs and in innovation. If we see it this way, the system has a future.”

“Health is not created by technology alone, but through the use of healthy materials, functioning cycles and life-supporting conditions.”

Dr-Ing. Michael Ott
Head of Technology Catalyst & Sustainability,
Siemens Healthineers

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Impact Before Efficiency:
Effectiveness as the Measure of Innovation

Market growth alone does not guarantee long-term viability. The competitiveness of medical technology companies is measured by the tangible contribution they make to the healthcare economy: through effective solutions, responsible material choices and viable business models. The same applies to the healthcare systems in which they operate. In Europe, these systems are under considerable pressure. Without effective structures, there is little room for development—without innovation, efficiency remains limited.

Safeguarding scope for innovation

The economic conditions for medical technology companies in Europe have tightened noticeably. Energy and material costs have risen, skilled labour is becoming scarce, and reimbursement levels are subject to constraints. At the same time, regulatory requirements—from the MDR and the AI Act to ESG criteria—are increasing both effort and complexity.

Marc-Pierre Möll outlines the strategic levers companies need to address. For him, long-term competitiveness begins with clear positioning. "Either I go into a niche or into scaling. Quality or quantity." Each path requires different structures, different investments and different market logics.

International competition is intensifying. Companies in Europe operate under different regulatory and cost conditions than competitors in China, India or Brazil. From development and production to supply chain management and quality assurance, efficiency must be considered systematically. This is not about cost-cutting alone. "Efficiency without innovation is a dead end in the medical device sector. But innovation without efficiency cannot be financed in Germany and Europe," says Möll.

Portfolio focus as a management task

A key strategic lever lies within a company's own portfolio. Product portfolios must be actively reviewed and streamlined: do existing products still deliver a clear clinical benefit? Are they future-proof, or do they merely generate regulatory and operational costs?

At the same time, the market is undergoing professionalisation, including on the demand side. Purchasing groups are bundling volumes, distribution structures are becoming more

"Efficiency without innovation is a dead end in the medical device sector. But innovation without efficiency is not financeable in Germany and Europe."

Dr Marc-Pierre Möll
Managing Director, BVMed

concentrated, and platform models are emerging. Market access itself is thus becoming a strategic competitive factor. Companies can influence many of the key parameters themselves: positioning, cost management, regulatory expertise, portfolio focus, strategic partnerships and talent retention.

Michael Ott expands the concept of efficiency to include impact: "Efficiency does not only mean saving resources or reducing costs. What matters is whether solutions make the healthcare system as a whole more effective."

A product may be technically mature and manufactured in a resource-efficient way. However, if it does not deliver measurable impact in clinical practice, does not improve processes, or is based on problematic materials, its contribution to the system remains limited.

Effectiveness therefore forms the basis of every efficiency decision, according to Ott. Innovation aims to improve care in a meaningful way, deploy materials in a targeted and responsible manner, and safeguard quality over the long term. Efficiency thus has a dual dimension: it concerns internal processes—and impact across the healthcare system as a whole.

System efficiency begins with structure and transparency

Tobias Gantner, who is also the founder of HealthCare Futurists GmbH, locates the problem in system design. By international comparison, Germany spends a great deal on healthcare, yet ranks only mid-table in terms of life expectancy.

The causes lie, not least, in fragmented responsibilities and a lack of incentives for genuine transformation. Technology changes processes, creates transparency and shifts power structures—which is precisely why it often meets resistance.
"We are building essential parts of an aircraft in mid-flight and must ensure that this aircraft does not crash," says Gantner.

"We are building essential parts of an aircraft in mid-flight and must ensure that this aircraft does not crash."

Prof. Dr med. Tobias Gantner
Physician and
Managing Director,
HealthCare Futurists GmbH

In his keynote at MedtecLIVE 2026, he addresses the future of the medical technology sector.

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Transparency as a prerequisite for reform capacity

A central deficit lies in a lack of transparency. Citizens are often unaware of how the healthcare system is financed and governed. Without this understanding, any debate on reform remains abstract.

Greater transparency also means greater visibility of inefficiencies. Digitalisation reveals where processes are redundant, slow or structurally outdated. This, in turn, increases the pressure for change—politically as well as institutionally.

The real lever lies in improved insight. Digital systems enable better pattern recognition, earlier intervention and more personalised prevention.

Healthcare delivery: shifting competences

Effectiveness and efficiency do not arise from cost control alone, but from a new process logic. One example is the concept of the “Digital Residential Practice” supported by Gantner: here, nursing staff take on diagnostic tasks, while specialists are integrated via telemedicine. Responsibilities are redistributed, waiting times reduced and expertise deployed more effectively.

Taken further, hospitals can become coordination centres that orchestrate inpatient, outpatient and telemedical services. Medical expertise is applied where it creates the greatest added value—not in documentation or administrative routines.

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Digitalisation, Automation and AI:
Rethinking Processes

Rising costs, skills shortages and increasing pressure on outcomes are forcing companies to rethink value creation—from development and production through to application in everyday care. At the same time, the sector is far from experiencing a "digital breakthrough". There are flagship projects and isolated solutions, but also unclear business models and a growing sense of disillusionment in the face of high expectations.

Between ambition and reality: where the sector stands

The starting point is uneven. On the one hand, documentation requirements, traceability obligations and post-market surveillance processes are increasing—making them difficult to manage without digital support. On the other hand, many medical technology companies still rely on historically evolved, highly manual processes and heterogeneous IT systems.

Marc-Pierre Möll describes this range as follows: "In medical technology, we have large companies, small companies, start-ups, very agile organisations and very traditional ones—and accordingly enormous differences in the use of digitalisation and AI."

The sector is particularly advanced in imaging, diagnostics and certain areas of product optimisation; here, digital technologies and AI are already firmly embedded in day-to-day operations. At the same time, significant potential remains untapped: "There is a lack of AI expertise. Some companies have had the topic on their agenda for years, but by no means all—especially not the majority of small and medium-sized enterprises," says Möll.

In addition, unclear framework conditions are slowing the adoption of data-driven solutions—for example, the question of how responsibilities and liability will be allocated in the future.

Automation between mass production and small batch sizes

A look at production illustrates why simple answers to automation do not work. Medical technology combines highly specialised products produced in small volumes—such as implants, surgical instruments or specialised diagnostic systems—with disposable products such as syringes, test kits or masks, which are manufactured in their millions on highly automated lines.

Niklas Kuczaty, Managing Director HealthTech at VDMA, puts it as follows: “Automation is certainly very important. But not everything can be solved through automation, precisely because we have these small batch sizes.”

Automation becomes particularly relevant when it influences decisions on production locations. Kuczaty cites the example of a system for manufacturing stents: such products are often produced in Asia. “With highly automated systems, they can now be manufactured economically in Europe—also because an engineer in China is no longer significantly cheaper than in Germany, while transport and supply security risks tend to weigh more heavily.”

Connected production: data flow instead of isolated solutions

For automation to deliver sustainable efficiency gains, data must be usable beyond individual machines, devices and departments. Open communication standards such as OPC UA and initiatives such as Manufacturing-X play a key role here. The aim is to describe machine data in a standardised, machine-readable way, exchange it securely and create continuous data spaces—from individual machines to line and plant control, and through to cross-company collaboration in supply chains and service networks.

For medical technology manufacturers, this means that key performance indicators such as overall equipment effectiveness (OEE), scrap rates, downtime and energy consumption can be made transparent and improved in a targeted manner. At the same time, production and field data can systematically feed back into development and service—for example, enabling faster product optimisation, predictive maintenance or data-driven service offerings.

On the user side, hospitals and laboratories increasingly expect systems that can be integrated into their IT and process environments—not as closed standalone systems, but as components of connected platforms.

Electronics as an enabler of digital solutions

For systems to function as components of such platforms, they require highly integrated electronics within the devices themselves.

Sensors capture vital parameters, actuators control pumps, valves or robotics, and embedded systems process signals in real time, ensuring stable and energy-efficient operation. With each development step, the share of electronic components increases: from MEMS sensors in wearables and mixed-signal ASICs in implants to power electronics, wireless modules and AI accelerators, which bring data analysis and therapeutic decision-making ever closer to the patient or directly into the product.

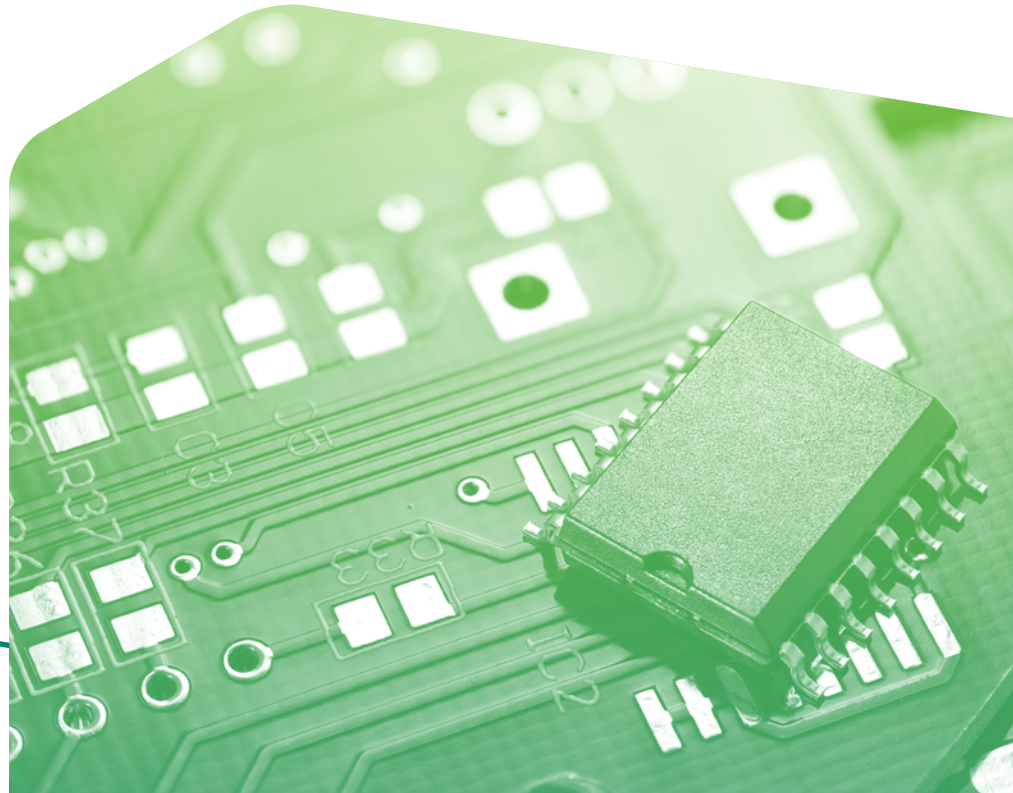
For suppliers, this means they are no longer delivering individual components, but complete electronic modules—including firmware, testing and documentation concepts.

OEMs, in turn, must integrate electronics development early into their product and platform strategies: which sensors are required? Which data are processed on the device, and which in the cloud? What service life and supply reliability must components provide?

In addition, issues such as electromagnetic compatibility and cybersecurity must be considered from the outset. Decisions at this stage form a central foundation for digital transformation.

Digital transformation as a rethinking of processes

There is a strong temptation to equate digitalisation with process acceleration. Tobias Gantner considers this too narrow. Digital transformation does not mean “doing what we used to do on paper now by email”, but fundamentally rethinking processes.



Gantner identifies three starting points that directly affect product and process design in industry.

- Solutions are needed to reduce administrative burden—for example through the automated capture and structuring of usage and process data.
- Systems must be designed to enable telemedical scenarios: usable remotely, updatable, securely networked, with clearly defined interfaces to hospital IT, practice software or platform services.
- Health data must be captured and made available in a way that allows it to be used for prevention, monitoring and early detection.

This shifts the role of medical technology—from a supplier of devices to a partner in digital care processes. Products that lock data into proprietary formats or offer only isolated functions will increasingly struggle to be integrated into connected care models.

Strategic implications for companies

Against this backdrop, several priority areas emerge for medical technology companies:

- **Focus instead of hype-driven portfolios**
  Not every idea needs to be pursued. What matters is identifying where digitalisation, automation and AI deliver tangible impact—whether by reducing costs, improving quality or enabling new revenue models.
- **Targeted automation**
  High-volume products, quality-critical production steps and location decisions are key priorities. Full automation at any cost is neither realistic nor economically viable.
- **Treat data as an integral part of the product**
  Devices, systems and software should provide data in a way that makes it usable for service, development and care processes—interoperable, secure and structured.
- **Understand real-world care delivery**
  Solutions that relieve the burden on nursing staff, physicians and patients require a deep understanding of workflows. Only then can digital concepts be translated into effective products.

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#5

Internationalisation:
Opportunities, Markets and Strategic Implications

The importance of global markets continues to grow, driven by demographic developments in many countries and the substantial need to modernise healthcare systems. Cross-border exchange represents a key pathway for growth, while also presenting medical technology companies with new strategic challenges.

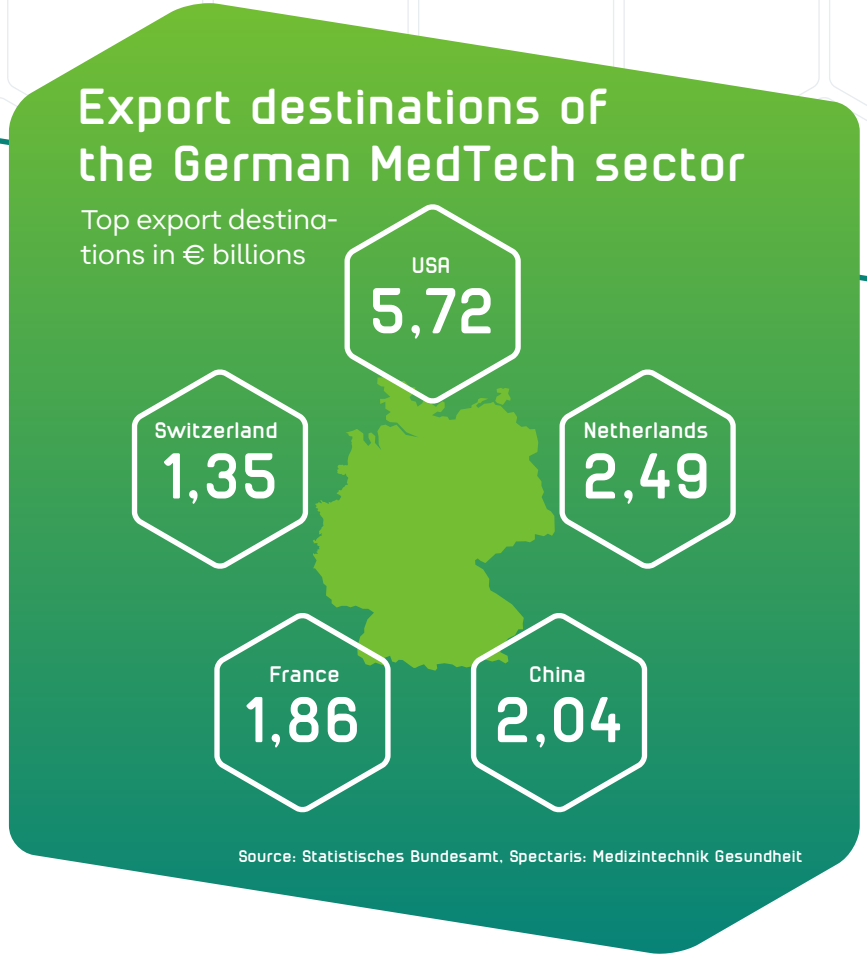
Export shares and target regions

Europe is one of the world's leading producers and exporters of medical technologies. The most important markets outside Europe are the United States, China and Japan. At the same time, the European single market remains a central trading area, characterised by intensive supply relationships between member states.

Within Europe, German medical technology companies play a key role. Europe is their most important sales region, followed by North America. The United States is the largest single market outside Europe. These figures underline the central importance of exports for the medical technology sector.

From exports to strategic market access

The traditional view of internationalisation as simply "selling products abroad" is now outdated. Market access increasingly depends on complex local approval systems, rising regulatory requirements and, in some markets, obligations to establish local production capacity. "International markets today expect more than pure supply relationships: in many regions, assembly, service or local partnerships are becoming prerequisites for market access," explains Stefanie Zenk, an expert in medical technology and the digital health economy at the Export Initiative for the Healthcare Industry at Germany Trade & Invest.
This development is not limited to emerging and developing markets.



Even in established markets such as North America or the Gulf states, partnerships and local presence are becoming increasingly important—particularly in the context of public tenders or long-term supply contracts.

United States: a demanding medtech market

North America—led by the United States—is the most important single market for medical technology worldwide. By 2029, the US market is expected to reach around US$328 billion, according to Germany Trade & Invest, with an average annual growth rate of just over five per cent. At the same time, imports account for around 30 per cent—clear evidence that foreign providers also have strong market opportunities.

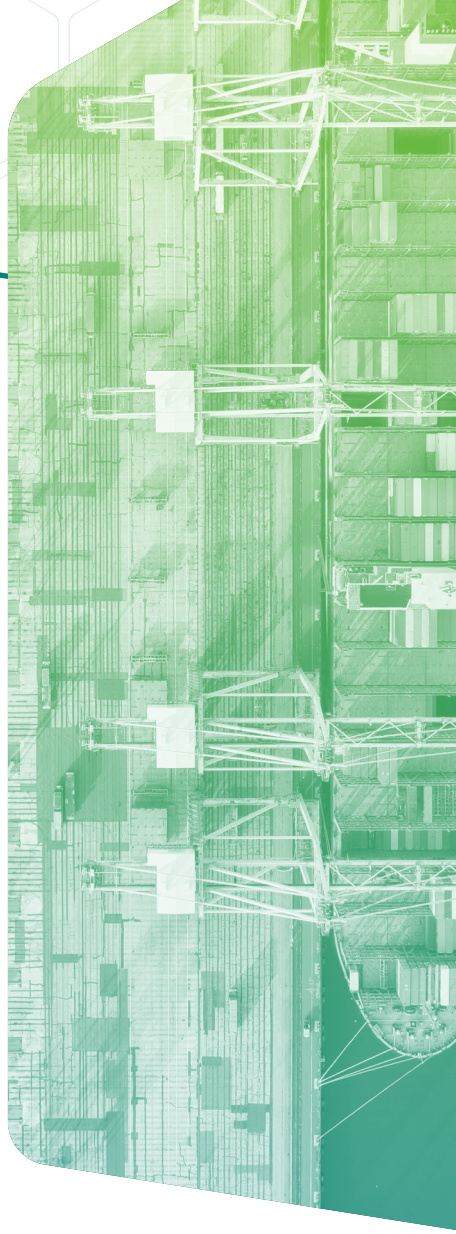
More than 600 hospital projects are planned or under construction. At the same time, a growing share of care is shifting to outpatient settings, particularly towards ambulatory surgery centres. For European medical technology manufacturers, this creates multiple entry points: traditional demand for equipment and infrastructure in hospitals, as well as solutions for outpatient surgical centres and primary care chains.

From a regulatory perspective, the United States is one of the most demanding, but also one of the most innovation-friendly markets. Any market entry requires approval from the U.S. Food and Drug Administration (FDA), including clearly defined requirements for clinical evidence, vigilance and reporting. By mid-2025, the number of approved AI-based medical devices had already reached around 1,250.

A US strategy requires a dedicated regulatory and reimbursement concept. In addition to FDA approval, companies must understand the reimbursement logic of Medicare, Medicaid and private insurers. Liability issues are also more complex than in Europe, making careful contract design and risk mitigation essential.

Strong demand from emerging markets

Asian markets—particularly China and India—are experiencing strong structural growth, driven by large populations and government healthcare investment. However, they require intensive engagement with local regulations and partner networks. The Middle East, especially the United Arab Emirates and Saudi Arabia, is also seeing rising demand, often supported by state-led modernisation programmes. Demand for high-quality imported products is strong.



"In emerging markets, a young middle class is growing—in countries such as Brazil, Indonesia, China or India. These population groups demand social security and reliable healthcare. This is creating enormous growth markets," observes Dr Marc-Pierre Möll. African countries are also expected to become more relevant in the medium term.

International frameworks and trade policy

Export orientation is increasingly shaped by geopolitical conditions. Trade policy, tariffs and bilateral agreements are having a growing impact on investment decisions.

Free trade agreements, such as the recently signed agreement with the Mercosur states, can facilitate market access—for example through tariff reductions or improved investment conditions. At the same time, global supply chains remain fragile. The pandemic demonstrated how vulnerable international production and procurement structures can be.

Möll emphasises that internationalisation must therefore also be understood as a resilience strategy: "International markets require clear strategic prioritisation and a robust supply chain architecture." Companies must therefore consider their sales strategy and supply chain management together.

While sustainability is becoming increasingly embedded in regulation in Europe, its international relevance remains uneven. However, Zenk observes gradual convergence: "Sustainability is becoming more relevant internationally, particularly where public procurement systems are becoming more professional." For German manufacturers, high sustainability standards can offer long-term differentiation.

"Sustainability is becoming more relevant internationally, particularly where public procurement systems are becoming more professional."

Stefanie Zenk
Expert in medical technology and the digital health economy, Export Initiative for the Healthcare Industry at GTAI

Support for international business

The Export Initiative for the Healthcare Industry supports, as an instrument of the German Federal Government, small and medium-sized enterprises (SMEs) in particular that face challenges when entering international markets.

Its services include market analyses, sector reports and delegation visits organised in cooperation with partners, bringing companies into direct contact with potential business partners, procurement bodies and public authorities in target markets.

Further information: **Click here!**

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#6

Sustainability:
Responsibility Beyond Regulatory Pressure

CO_2 footprint in the healthcare sector

If the global healthcare sector were a country, it would be the fifth-largest emitter of greenhouse gases worldwide.

The three largest emitters (United States, China, EU) together account for more than 56 per cent of the global healthcare carbon footprint.

In Germany, around 5.2 per cent of national emissions are attributable to the healthcare sector; the EU average is 4.7 per cent.

Within the healthcare sector, medical devices and their associated supply chains account for the largest share, at 71 per cent.

Source: Health Care Without Harm: Health care climate footprint report

Sustainability remains a central issue in medical technology—but the momentum has shifted. Following a phase of regulatory initiatives and intense political debate, immediate pressure appears to be easing. Legislative proposals are being reviewed, deadlines adjusted and priorities reassessed. The topic has lost some of its political urgency.

An independent competitive factor

This raises a strategic question for companies: is sustainability only pursued when it is mandated by regulation, or is it understood as an independent driver of competitiveness and resilience? There is much to suggest that sustainability should not be treated solely as a compliance task, but as part of a robust corporate strategy. It touches on fundamental issues of efficiency, risk management and market positioning.

Companies in the healthcare sector, which contribute directly to improving quality of life, also carry a particular responsibility to align environmental and resource protection with their own value creation.

Regulatory developments: easing pressure, structural foundation remains

In recent years, European policymakers have introduced a number of relevant regulatory frameworks—including the Corporate Sustainability Reporting Directive (CSRD), the EU Taxonomy Regulation, the German Supply Chain Due Diligence Act and the new EU Packaging Regulation (PPWR). These initiatives have increased transparency and reporting requirements along the value chain, particularly in relation to climate and resource issues.

Stefanie Brauer, Head of Partner Network Health & Cluster Medical Technology at Bayern Innovativ, describes

the current situation as a phase of relative consolidation: “In connection with reporting requirements, thresholds relating to company size have been raised, among other changes. As a result, many organisations are no longer subject to reporting obligations. This has led to a noticeable reduction in pressure from hospitals, and some institutions are scaling back their sustainability activities. For manufacturers, this means that demand for corresponding evidence is currently being enforced less consistently.”

Short-term relief does not equate to a strategic all-clear. Companies that view sustainability purely through a regulatory lens risk underestimating medium-term market and reputational developments.

Why sustainability remains strategic

Even with reduced political momentum, sustainability remains a strategic factor:

- Investors are increasingly incorporating ESG criteria into financing and valuation decisions.
- Public procurement systems are further developing sustainability requirements.
- Rising energy prices, material shortages and geopolitical uncertainties are increasing economic pressure.
- Societal expectations of responsible business conduct are growing.

Sustainability is not determined in reporting, but in technology choices, material selection and business models. Key levers include the use of safe, non-toxic materials, the consistent implementation of circular business models, and the intelligent design of product and process architectures.

Circular business models are gaining importance. They systematically integrate R-strategies such as refuse, reduce, reuse, repair, refurbish, remanufacture and recycle into product design, service concepts and business logic. The aim is to extend product lifecycles, reuse components multiple times and retain materials within technical or biological cycles, thereby creating the basis for innovation.

However, all efficiency decisions must be grounded in an ecologically effective overall concept. “There is no point in producing products in a cost-efficient and low-CO_2 way if they ultimately become non-recyclable waste. Every material used must be selected and applied in such a way that it can be recovered and reused at high quality,” Ott is convinced.

Reducing the ecological footprint is therefore not the result of isolated cost-cutting measures, but of effective material choices, functioning cycles and durable product concepts. In the short term, this requires additional effort. In the long term, however, it enables cost reductions, lowers supply chain risks, minimises regulatory adaptation costs and unlocks new innovation potential.

International perspective: differing priorities

Sustainability is also gaining importance internationally, albeit at different speeds and under different conditions. While Europe is advancing strongly through regulation, sustainability criteria in other regions are developing more through market mechanisms or within the context of state-led modernisation programmes.

Nevertheless, awareness of energy efficiency, resource conservation and transparent supply chains is increasing globally.

For export-oriented companies, this means that sustainability is becoming an integral part of international competitive dynamics. Those that establish high standards can differentiate themselves—but must carefully balance costs, market requirements and positioning.

Networks as a lever for transformation

Sustainability is not an isolated corporate initiative, but a value creation task. It affects raw materials, suppliers, packaging, transport, energy supply and disposal systems. Individual companies quickly reach structural limits.

In the healthcare sector, initiatives are therefore increasingly emerging

“There is no point in producing products in a cost-efficient and low-CO_2 way if they ultimately become non-recyclable waste.”

Dr-Ing. Michael Ott
Head of Technology Catalyst & Sustainability,
Siemens Healthineers

in which manufacturers, hospitals, associations and suppliers work together on solutions. These platforms facilitate the exchange of best practices, the development of shared standards and the launch of pilot projects—for example in circular economy approaches, CO_2 reduction or increasing supply chain transparency. “Such collaborations pool expertise, increase political visibility and enable economies of scale that individual market participants could hardly achieve on their own,” says Stefanie Brauer.

In a highly regulated environment such as medical technology, coordinated collaboration can reduce transformation costs and accelerate innovation processes.

Strategic implications

Even if regulatory pressure currently appears less dynamic, waiting carries strategic risks. What is required is a positioning that combines environmental responsibility with economic rationality:

- Do not reduce sustainability to minimum regulatory requirements.
- Differentiate market strategies internationally.
- Design supply chains with a focus on resilience and resource efficiency.
- Actively leverage networks to enable economies of scale and standardisation.

Sustainability initiatives in medical technology

Collaborative initiatives involving industry, hospitals and other stakeholders are addressing topics such as the use of biomaterials, sustainable packaging, energy efficiency and emissions reduction.

The **Alliance for Sustainability in Medical Technology** brings together companies, associations and other industry stakeholders. Its focus includes circular economy concepts, CO_2 reduction, transparency standards and sustainable production processes:

Click here!

The **industry association BVMed** coordinates activities related to sustainable procurement, circular economy approaches and supply chain transparency, and promotes exchange within the industry. Further information on initiatives in the healthcare sector can be found here:

Click here!

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#7

New Markets:
Medical Technology as an Industrial Adjacency

Medical technology represents a strategically attractive field for many companies from other industries. One sector that has systematically used medical technology for diversification over many years is mechanical and plant engineering. For this industry, the importance of medical technology has increased further in recent years against the backdrop of structural decline in the automotive sector. However, those seeking to enter the market must understand its specific characteristics.

From replacement market to strategic pillar

One structural advantage that makes medical technology particularly attractive for industrial suppliers is the presence of long-term customer relationships. Collaborations often run for many years, creating a high degree of planning certainty for re

venues and investments. Switching suppliers is usually associated with significant effort for medical technology manufacturers—technically, but above all from a regulatory perspective. Processes must be revalidated and certifications obtained again.

At the same time, there are structural barriers. It is not uncommon for two to three years to pass before series production is achieved. Development and validation processes require time, resources and robust references. In addition, competition among suppliers is increasing. Precisely because medical technology is seen as a stable market, more and more companies are considering entry.

Niklas Kuczaty describes entry as a strategic decision rather than a short-term response to economic weakness: “If you only enter medical technology in economically difficult times, you are already too late.” The market requires patience, investment and a willingness to adapt processes.

Production reality: precision, validation and system logic

This applies first and foremost to production logic. The commonly used equation “medical technology equals small batch sizes” is too simplistic. While there are highly specialised products with limited volumes, such as implants or imaging components, disposable products are produced in enormous quantities on highly automated lines. For mechanical engineering companies with experience in precision engineering and full automation, these segments are technologically accessible.

At the same time, different rules apply. Processes must be validated, documented and operated in a consistently stable manner.

“If you only enter medical technology in economically difficult times, you are already too late.”

Niklas Kuczaty
Managing Director,
VDMA HealthTech

For many engineering companies, however, this is less daunting than it may initially appear. Certifications such as ISO 9001 are already standard in the industry. ISO 13485 certification is often not mandatory for providers of production technology. What matters is understanding the regulatory requirements of the customer—knowing which documentation and verification obligations must be fulfilled. Those who understand this logic can design systems and processes in a way that supports regulatory compliance.

Digital interoperability as a point of entry

Highly automated processes can enable economically viable production even in high-cost locations. Digitalisation reinforces this trend. Standards such as OPC UA create interoperable interfaces between machines. Initiatives such as Manufacturing-X aim to make industrial data spaces usable across sectors. For medical technology, this means that production systems must not only operate with precision, but also provide data in a structured, secure and traceable manner.

This is precisely where another entry point for other industries emerges. Companies with experience in standardised interfaces, data sovereignty and connected production systems can transfer this expertise into medical technology.

New interfaces within the healthcare system

Points of connection are not limited to production. New interfaces for industrial technologies are also emerging within healthcare systems themselves. Automated hospital pharmacies, where medicines are

At BVMed, concrete points of connection for other industries are seen particularly in precision manufacturing, robotics and sensor technology, as well as in contract development and manufacturing.

One particular strength of Germany as a location lies in the combination of AI and classical engineering expertise, says Managing Director Marc-Pierre Möll: **“A medical technology robot has an arm with highly precise mechanical components. AI can calculate a great deal—but without excellent mechanics, the system does not work.”**

It is precisely this combination of software intelligence and mechanical precision that opens up viable opportunities for industrial companies.

dispensed using robotics, reduce error rates and relieve specialist staff.

Skills shortages, rising demand for care and economic constraints are forcing the system towards greater efficiency and automation. Technological solutions are available, and their benefits have often been demonstrated. Nevertheless, implementation remains politically and organisationally complex. Investment in technology competes directly with personnel costs, even though automation could help to compensate for staff shortages. “Technically, a great deal is possible—the greater challenge lies in investment logic and the political framework conditions,” Kuczaty notes: “A purely commercial approach is not possible in many areas of healthcare.”

Strategic implications for new entrants

- Market entry requires patience, investment and robust partnerships. Short-term volume shifts are not realistic in medical technology.
- A deep understanding of OEM regulatory requirements and the ability to align processes accordingly are essential.
- Efficient, validatable and scalable production concepts are strong competitive arguments in the context of skills shortages and global location debates.
- Interoperable systems and data-enabled production equipment are increasingly becoming prerequisites for collaboration along the value chain.
- What is required are not just components or machines, but solutions that support process reliability and efficiency across the entire system.

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"Mighty MedTech":
Perspectives on the Future of Medical Technology

Medical technology will remain a global growth field—driven by demographic change, technological progress and the expansion of healthcare systems. Where efficiency, technology and market strategy work together, companies will continue to find opportunities for success.

There are strong indications that Germany and Europe can hold their ground despite cost pressures and regulatory constraints. One important building block is the classification of medical technology as a key industry by the German Federal Government last year. Alongside automotive, chemicals, mechanical engineering and pharmaceuticals, medtech now ranks among the leading industrial sectors. This development opens access to industrial policy strategies, facilitates participation in strategic policy dialogues and sharpens policymakers' focus on the specific characteristics of the sector.

Measured by revenue and employment, medical technology is already on a par with the pharmaceutical industry—with annual revenues well above €40 billion, more than 200,000 employees in Germany, many of them in small and medium-sized enterprises, and a high export share. Marc-Pierre Möll captures this shift in perception:

"We always talk about Big Pharma. This is Mighty MedTech."

From this new role arises a clear expectation: improved framework conditions for research, skilled labour and investment, a dedicated medtech strategy and stronger integration into healthcare policy reform processes. If these expectations are met, the likelihood increases that value creation, expertise and key functions of medical technology will remain in Europe—rather than shifting to more dynamic regions.

MDR reform: less friction, greater planning certainty

At the same time, constraints at EU level that have significantly burdened companies in recent years are beginning to ease. The Medical Device Regulation (MDR), with its transition periods, bottlenecks in notified bodies and extensive documentation requirements, has tied up considerable resources, particularly among SMEs. The current reform proposal aims to extend transition periods, simplify procedures, reduce duplicate assessments and align requirements more closely with product risk.

For companies, this ideally means less certification effort and greater predictability in new developments. If successful, this would create conditions in which high safety standards and the capacity for innovation are no longer in conflict.

AI and sustainability: infrastructure rather than a passing trend

Technologically, the sector is on the verge of a step change. Artificial intelligence will transform diagnostics, production, services and business models.

"AI is the new electricity. It will establish itself across all areas,"

says Michael Ott. At the same time, he warns against delegating responsibility to algorithms.

For medical technology, this means that AI-supported systems can assist decision-making—for example in product design, material selection or prioritisation—provided that the underlying data are valid, transparent and traceable. Responsibility, however, remains with humans.

When deployed strategically, AI can help make environmental impacts visible, analyse material flows and further develop circular business models in a targeted way. This requires robust data, clear governance structures and interdisciplinary teams capable of interpreting results. AI thus becomes a tool for better, more effective decisions—not a substitute for judgement.

Sustainability remains a strategic issue, even if regulatory pressure has temporarily eased. "Business models will increasingly be judged on whether they help hospitals and healthcare systems combine high-quality care with measurable resource savings—instead of treating sustainability as an additional cost burden," says Stefanie Brauer.

"Business models will increasingly be judged on whether they help hospitals and healthcare systems combine high-quality care with measurable resource savings—instead of treating sustainability as an additional cost burden."

Stefanie Brauer
Project Manager Sustainability & Digitalisation in Healthcare, Bayern Innovativ

More entrepreneurship—or missed opportunities

Is all of this enough to unlock growth potential?

“We need more entrepreneurship in healthcare again,”

believes Tobias Gantner. In Europe, risk aversion and fear of failure continue to dominate.

This is also due to existing structures: many medtech start-ups fail to achieve broad uptake of their products in routine care. Reimbursement and liability issues hinder scaling, while limited access to routine data makes it difficult to generate robust evidence of effectiveness.

In the coming years, the key question will therefore be whether systems and markets are ready to absorb innovation. The transformation of care—from role profiles and care models to the use of data—will succeed if political will, entrepreneurial courage and a willingness to change come together.

Key questions and the role of MedtecLIVE 2026

This constellation raises important questions for the years ahead: how can the status of medical technology as a key industry be translated into reliable framework conditions—from MDR reform through to a coherent medtech strategy in Germany and Europe? How can AI be integrated into products, processes and care delivery?

And how can the balance be struck between ambitious sustainability targets and international competitiveness?

MedtecLIVE 2026 plays a central role in addressing these questions as a meeting point for Europe’s medtech suppliers and medical device manufacturers and providers. From 5 to 7 May in Stuttgart, the event brings together manufacturers, suppliers, start-ups, consulting service providers, policymakers and researchers. It highlights which technologies are already available, where system boundaries lie and where collaboration can begin.

It also provides a forum in which debates on the future of medical technology can take place—well-informed, open and focused on what matters for patients and society.

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The Future of Medical Technology at MedtecLIVE 2026

How will medical technology evolve in the coming years? This question is at the heart of **MedtecLIVE 2026**, which will bring together manufacturers, suppliers, researchers and innovators **in Stuttgart from 5 to 7 May 2026**. A highlight of this year's programme is the keynote by Prof. Dr med. Tobias Gantner. He will then join other experts in a panel discussion moderated by Dr Meinrad Lugan to explore which capabilities and technologies will determine future competitiveness—and how companies can successfully manage the transition from existing structures to data- and AI-driven processes.

KEYNOTE

„The Future X-Ray View" – What Medtech Suppliers and Manufacturers Will Need to Master Tomorrow

Opening keynote by
Prof. Dr med. Tobias Gantner

Further insights into key future topics such as digitalisation, sustainability and emerging technologies at MedtecLIVE 2026 can be found in the event's supporting programme.

Explore the supporting programme here

Secure your ticket with the e-code „MTL26-Report-EN"!

(Registration required)

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Appendix

Contributors

The following experts contributed to the development of this industry report with their perspectives and experience. Their insights from industry, associations, networks and the commercial healthcare sector have informed the report. We would like to express our sincere thanks.

Stefanie Brauer

Stefanie Brauer is a Project Manager for Sustainability and Digitalisation in Healthcare at Bayern Innovativ. She brings together companies, hospitals and research institutions on topics related to innovation, sustainability and digitalisation.

Niklas Kuczaty

Niklas Kuczaty is Managing Director of the HealthTech Working Group at the VDMA. VDMA HealthTech is the European platform for companies in the industrial healthcare sector, particularly in the fields of supplier industries and healthcare automation.

Dr-Ing. Michael Ott

Michael Ott heads the Technology Catalyst & Sustainability division at Siemens Healthineers. He drives the integration of technology, production and sustainability across the company's global value chains.

Prof. Dr med. Tobias Gantner

Tobias Gantner is a physician, health economist, lawyer and philosopher. As Founder and Managing Director of HealthCare Futurists, he focuses on digital innovation in healthcare.

Dr Marc-Pierre Möll

Marc-Pierre Möll is Managing Director of the BVMed and a member of both the BVMed Board and the MedTech Europe Board. He represents the perspective of the medtech industry in healthcare policy discussions.

Stefanie Zenk

Stefanie Zenk is an expert in medical technology and the digital health economy at the Export Initiative for the Healthcare Industry at Germany Trade & Invest (GTAI). She analyses global medtech markets and supports companies in export and internationalisation activities.

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About MedtecLIVE

MedtecLIVE, taking place from May 5 to 7, 2026 in Stuttgart, is Europe's leading trade fair for medical technology suppliers, covering the entire value chain—from product development and design, materials and components, to production technologies, software, certification, and regulatory affairs, as well as downstream processes. Visitors include European OEMs, distributors, and manufacturers of medical devices and large-scale equipment.

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