MedTech Europe
from diagnosis to cure

Facts & Figures 2025

The European Medical Technology Industry in figures

Insights That Drive Us Forward

A message from our CEO

I am pleased to present this new edition of MedTech Europe's Facts & Figures, our annual overview of the medical technology sector's footprint. Drawing on robust data, this publication paints a clear picture of medical technology's contribution to both healthcare and the wider economy in Europe.

Whether you are shaping policy, advancing innovation, delivering care, or simply curious about the impact of our sector, I invite you to explore these insights and better understand the indispensable role medical technology plays in strengthening health systems, supporting innovation, and improving life for people across Europe, and beyond.

Oliver Bisazza,
CEO MedTech Europe

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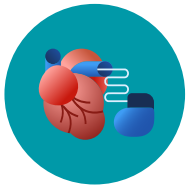
What is medical technology

Medical technologies are products, services or solutions used to save and improve people's lives. In their many forms, they are with you from prevention to diagnosis and cure. There are three main categories of medical technologies:



Medical Devices (MDs)

Are products, services or solutions that prevent, diagnose, monitor, treat and care for people.

In vitro diagnostics (IVDs)

Are non-invasive tests used on biological samples (for example, blood, urine or tissues) to determine the status of a person's health.

Digital health

Are tools and services that use information and communication technologies (ICTs) to improve prevention, diagnosis, treatment, monitoring and management of a person's health and lifestyle.

There are more than 2,000,000 medical technologies, categorised into more than 7,000 generic devices groups[1], available in hospitals, community care settings and at home.

Medical technologies provide value in different ways. They allow people to **live longer and better lives**. At the same time, medical technologies improve the quality of care, and the efficiency and sustainability of healthcare systems.

Medical technologies can be everyday objects such as sticking plasters, syringes, surgical masks, and latex gloves, as well as spectacles, wheelchairs, COVID-19 tests and medical apps. Medical technologies also include total body scanners, gene mutation tests, implantable devices such as heart valves and pacemakers, and replacement joints for knees and hips.

Regulations

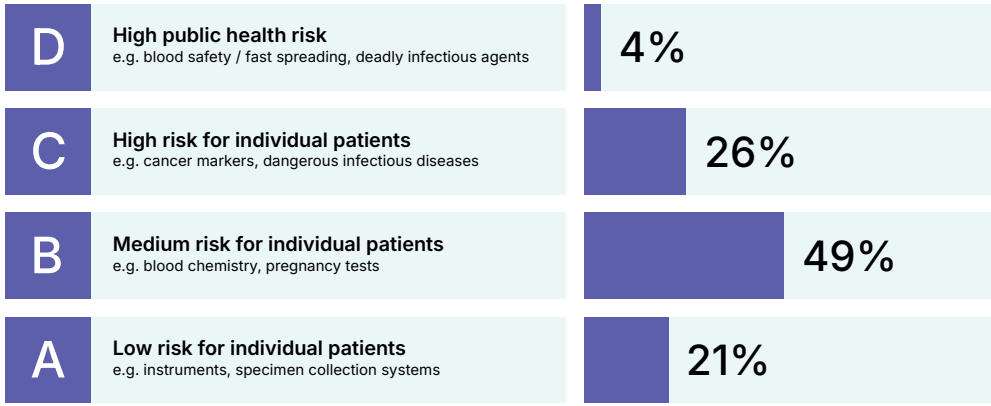
In the European Union, medical technologies are tightly regulated by laws that govern the safety and performance of devices across their lifetime, before and after they are placed on the market. The European medical technology sector is currently transitioning from being regulated under the EU medical devices and IVD directives to two regulations.

Classification of *In Vitro* Diagnostic Medical Devices

The *In Vitro* Diagnostic (IVD) sector is regulated by Regulation 2017/746/EU.

Classification of IVDs is important as it determines the level of involvement by a third party (the "notified body") in assessing IVDs both pre- and post-market. This level of control generally reflects the risk of an incorrect result from the test.

Under the IVD Regulation, all IVDs are classified under a risk-based classification system according to the risk the device poses to the health of the public and/or an individual as result of an incorrect test result. All IVDs are classified as class A, B, C or D, with class D being the highest risk class.



Classification of Medical Devices

Since 26 May 2021, the medical device (MD) sector is regulated by Regulation (EU) 2017/745, (MDR).

Classification of medical devices drives many pre- and post-market requirements. Due to the large variety of products, the level of control before placing them on the market depends on the level of impact on the human body that their use might imply. The same notified body is involved in post-market surveillance to ensure the continued safety and performance of medical devices.

Under the **MD Regulation**, MDs are classified into **4 classes** following a risk-based classification system, which links the class of the device to the potential risk posed to the patient's health as a result of a fault of performance.

All MDs are classified as class I, IIA, IIB or III, with class III being the highest risk class.

Class I

e.g. simple bandages or wound care products

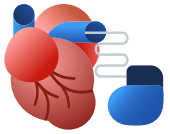
Class IIa

e.g. syringes for pump infusion

Class IIb

e.g. anaesthesia machines

Class III



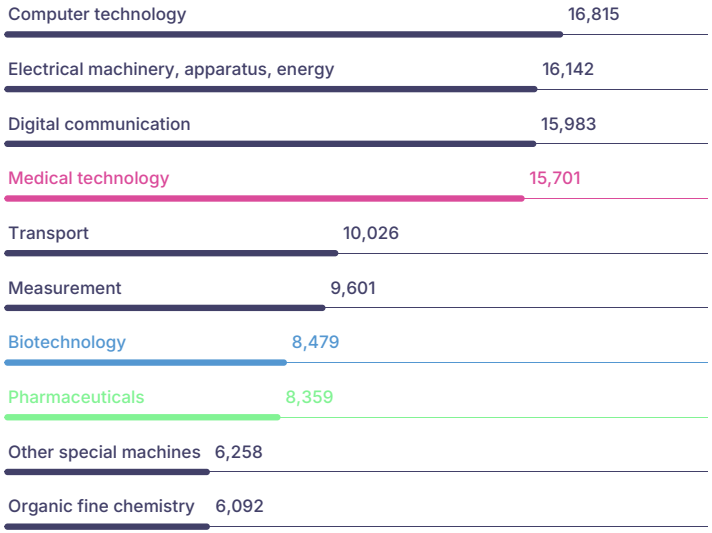
e.g. pacemakers

Innovation

Medical technology is characterised by a constant flow of innovations, which are the results of a high level of research and development within the industry, and of close co-operation with users.

The average global R&D investment rate (R&D spend as a percentage of sales) is estimated to be around 8% in the medical technology sector[2]. Products typically have a lifecycle of only 18-24 months before an improved product becomes available.

In 2024, more than **15,700** patent applications were filed with the European Patent Office (EPO) in the field of medical technology, representing a 1.2% reduction in patent applications compared to the previous year[3]. The medical technology field accounts for **7.9%** of the total number of applications, the 4th highest among all industrial sectors in Europe, after Digital communication, Computer technology and Electrical machinery, apparatus, energy sectors. **40.5%** of these patent applications were filed from EPO countries (including EU27, United Kingdom, Norway and Switzerland), **38.2%** from the US and the remaining **21.3%** originated from other countries.



Graph 1 – Top 10 technical fields in patent applications

Number of patent applications filed with EPO, 2024 (ref. 3)

In comparison, around **8,400** applications were filed in the pharmaceutical field and around **8,400** in the field of biotechnology. While over the last two decades the number of EPO filings in the field of medical technology has almost tripled, pharma and biotech patent applications remained relatively stagnant. Furthermore, the ratio of granted patents to patent applications in medical technology field stands at **70.1%** in 2024. In contrast, the same ratio is circa **36%** and **22%** in pharmaceutical and biotechnology field respectively (Graph 2).

Graph 2 – Evolution of European patent applications and granted patents by technical field

2024 (ref 3.)

Digital health

Digital health is rapidly scaling in Europe: with the convergence of breakthrough technologies, patient empowerment, systems efficiencies and real-world data, digital solutions are easing some of the most pressing healthcare systems' challenges.

Momentum is building across Europe

- In 2024, Germany and France, two of Europe's largest healthcare markets, expanded access to digital health through established reimbursement frameworks.
- In 2025, Belgium officially launched its national reimbursement of (m-health) solutions, with eight solutions fully reimbursed as of January 2025.

Germany: A pioneer in digital health integration

Germany remains the benchmark for digital health integration through its DiGA (Digital Health Applications) pathway, with:

- **59** DiGA solutions now reimbursed across diverse therapy areas. Germany has reached an important access milestone with over **1 million** DiGA prescriptions issued since launch in 2020.
- **85%** utilisation rate of prescribed solutions in 2024.
- **€234** million in Social Health Insurance expenditure in the reporting period.

France is also advancing steadily with a dual-track reimbursement model:

National Coverage for remote monitoring solutions is setting the foundation for nationwide digitally enabled care delivery, with:

- **25** brand-specific codes and **50** generic codes issued for digital services.

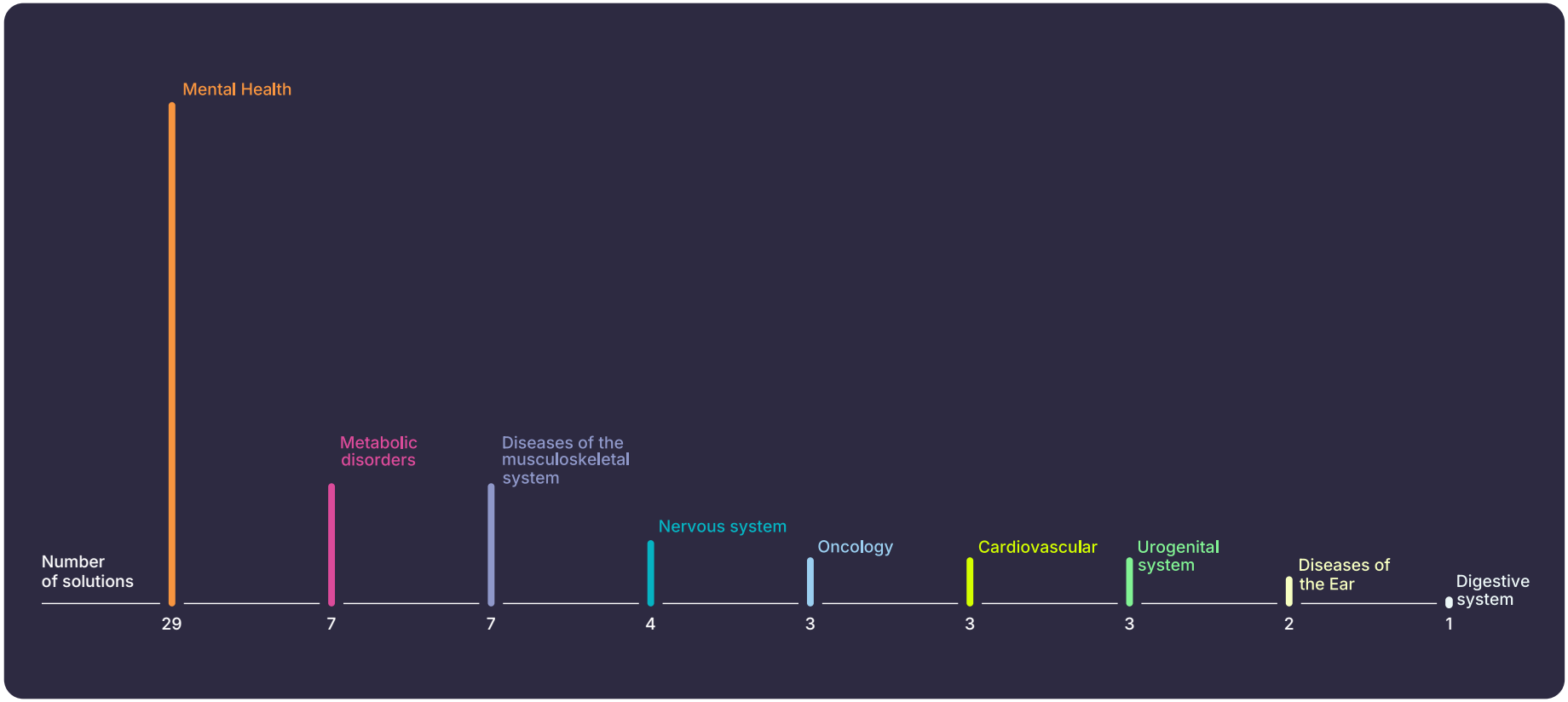
PECAN (Derogatory Financing) pathway supporting digital innovation:

- **3** solutions reimbursed, covering digital applications in oncology, rehabilitation, and physiotherapy.

Digital health is no longer optional. With strong political will, smart regulation, and continued investment in value-based innovation, Europe can lead the way in integrating digital health into every level of care.[4]

Number of digital solutions by indication area in Germany (ref 12.)

2024



Employment

The European medical technology industry employs directly more than 930,000 people[5].

Germany had the highest absolute number of people employed in the medical technology sector, while the number of medical technology employees per capita is highest in Ireland and Switzerland. In comparison, the European pharmaceutical industry employs around 950,000 people[6].

The jobs created by the medical technology industry account for around **0.34%** of total employment in Europe[7]. These jobs are also highly productive, as the value added per employee is estimated to reach around **€183,000** per employee.

These indicators show that the medical technology industry has an important economic and societal impact in Europe.

930,000+
employees[5]

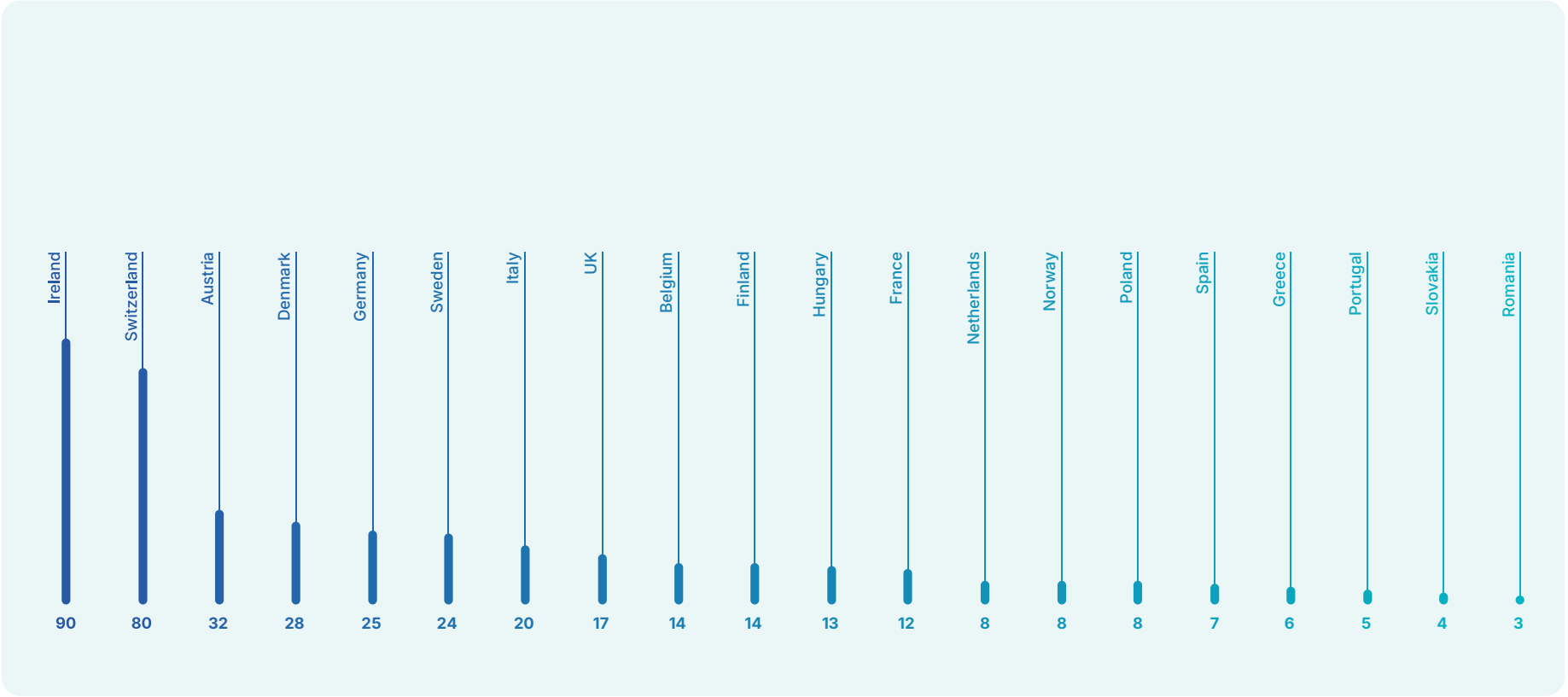
Country	Employment
Germany	212,100
Italy	117,607
United Kingdom	117,200
France	84,000
Switzerland	71,700
Ireland	48,000
Spain	32,000
Poland	30,000
Austria	29,026
Sweden	25,600

Graph 3 – Top 10 countries in Europe with highest direct employment in the medical technology industry

Latest year available (ref. 5)

Graph 4 – Number of people directly employed in the medical technology industry per 10,000 inhabitants

Latest year available (ref. 5)



Companies

There are more than 38,000 medical technology companies in Europe.

The highest number is based in Germany, followed by Italy, the United Kingdom, Poland, Sweden, and Switzerland.

Small and medium-sized companies (SMEs) make up around **90%** of the medical technology industry, the majority of which employ less than 50 people (small and micro-sized companies)[5].

38,000
medical technology companies in Europe
90% SMEs

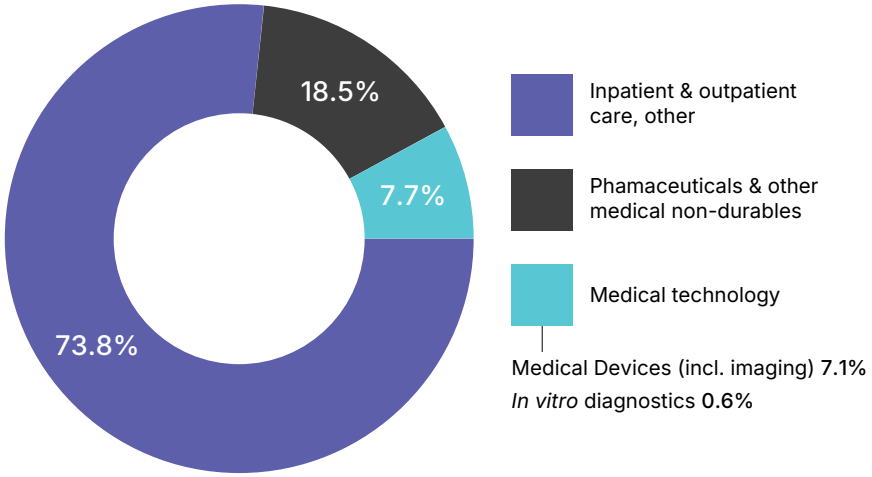
Expenditure on medical technology

In Europe, an average of approximately 10% of gross domestic product (GDP) is spent on healthcare.

Of this figure, around **7.7%** is attributed to medical technologies, i.e. less than **1%** of GDP. The spending on medical technology is estimated to vary significantly across European countries, ranging from around **5%** to **12%** of the total healthcare expenditure. Expenditure on medical technology per capita in Europe is at around **€319**.*

* MedTech Europe calculation based on sources 5-10.

Graph 5



Medtech market in Europe

The European medical technology market is estimated at roughly **€170 billion** in 2024.[10,11] The top five biggest markets are Germany, France, the United Kingdom, Italy, and Spain.

Based on manufacturer prices, the European medical device market is estimated to make up **26.4%** of the world market. It is the second-largest medical device market after the United States (**46.4%**).[10]

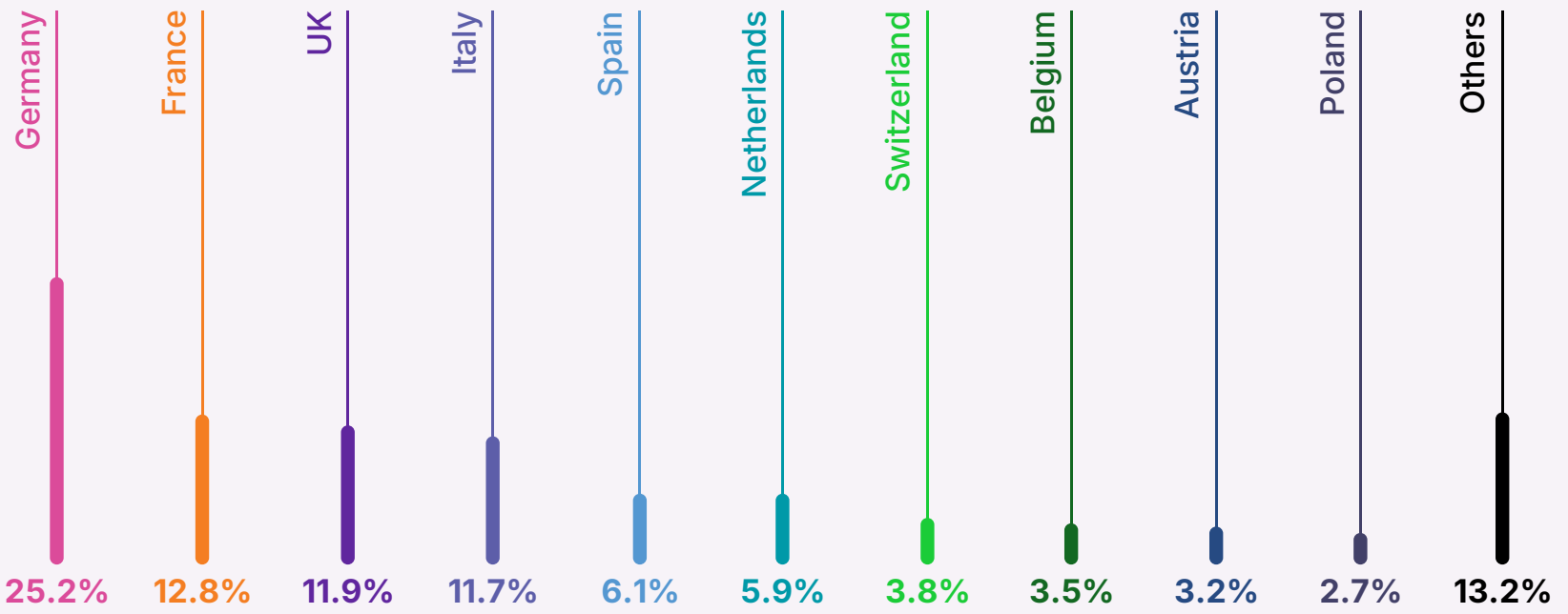
€170 billion market

2nd largest market after US

26.4% of world market

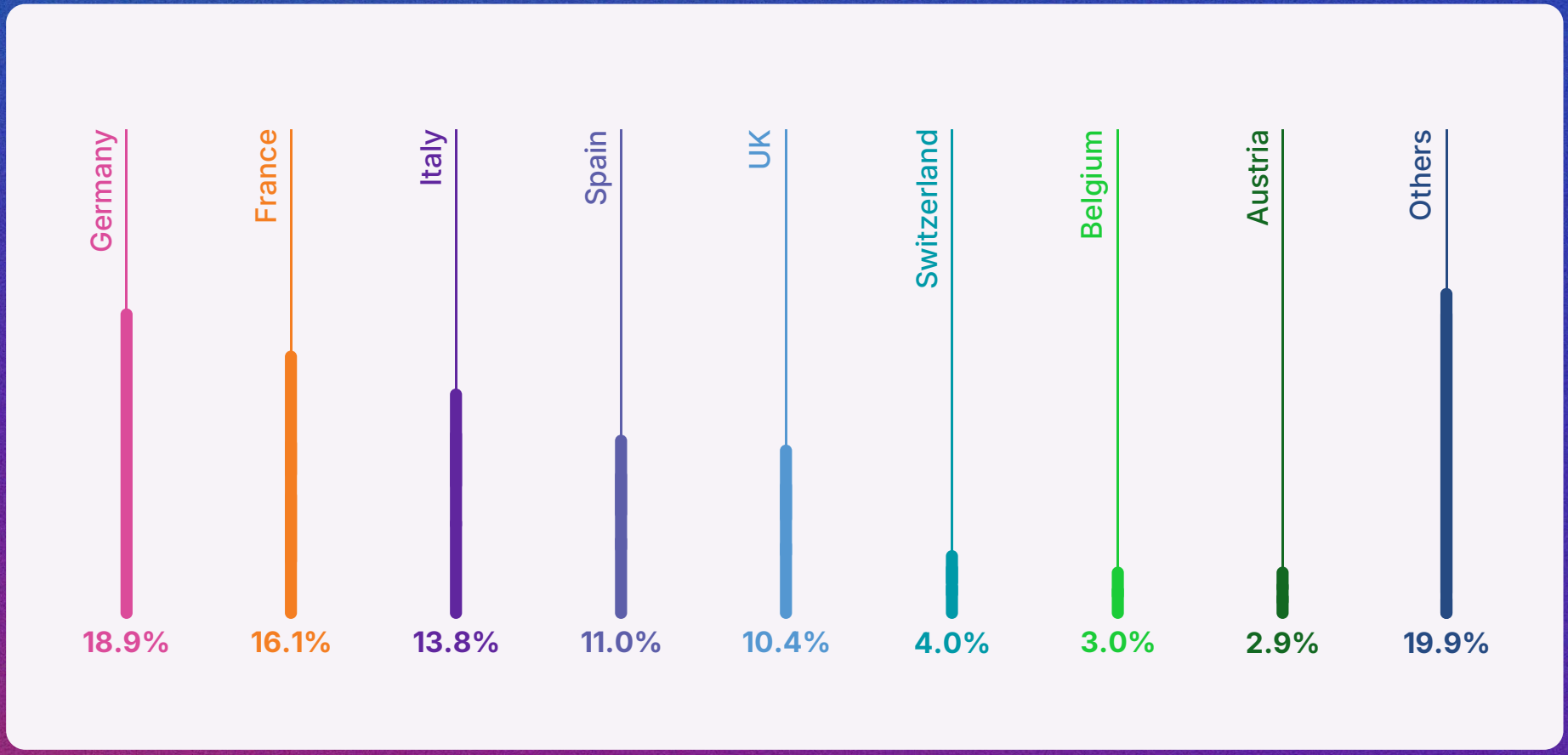
Graph 6 – European medical device market by country

Based upon manufacturer prices, 2024



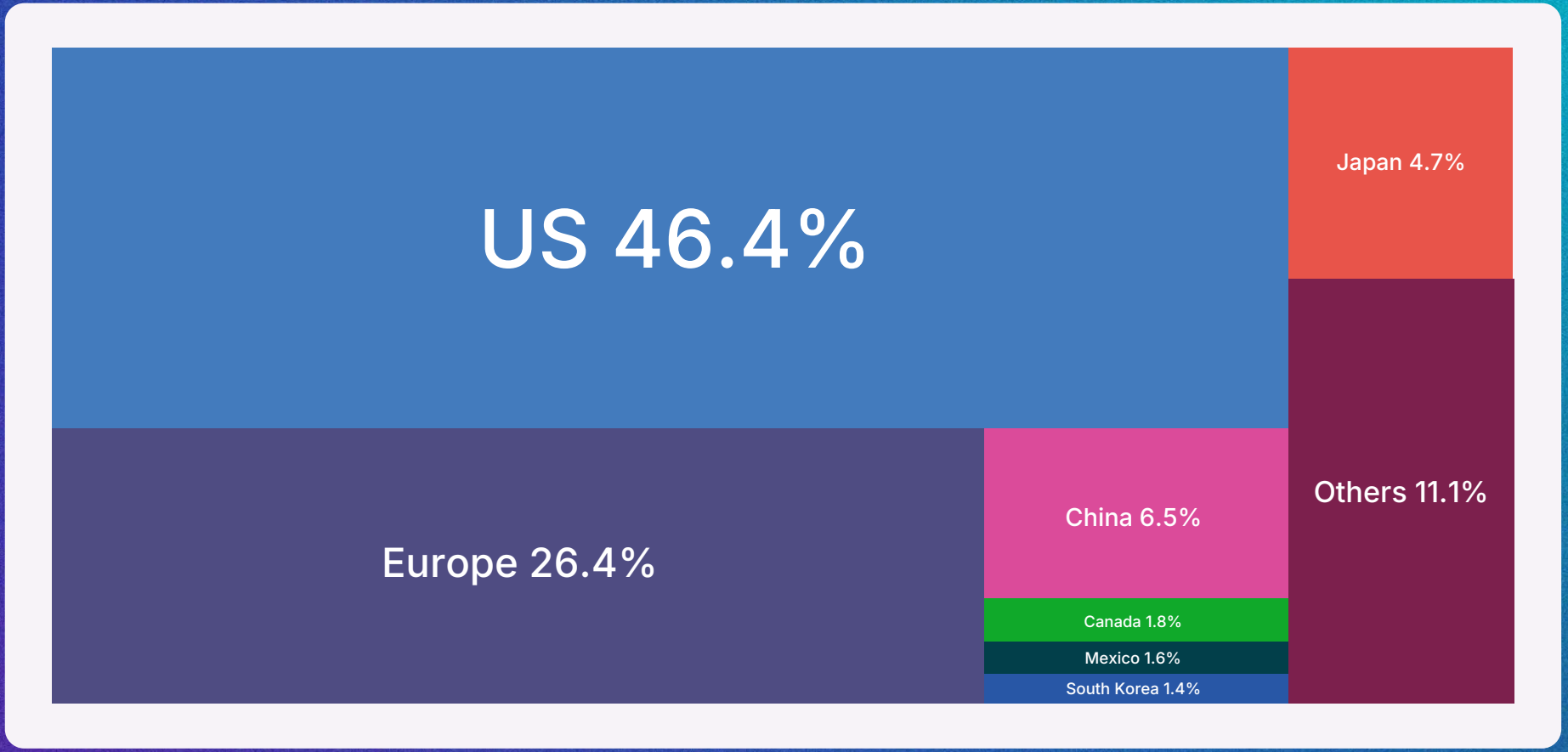
Graph 7 – European IVD market by country

Based upon manufacturer prices, 2023



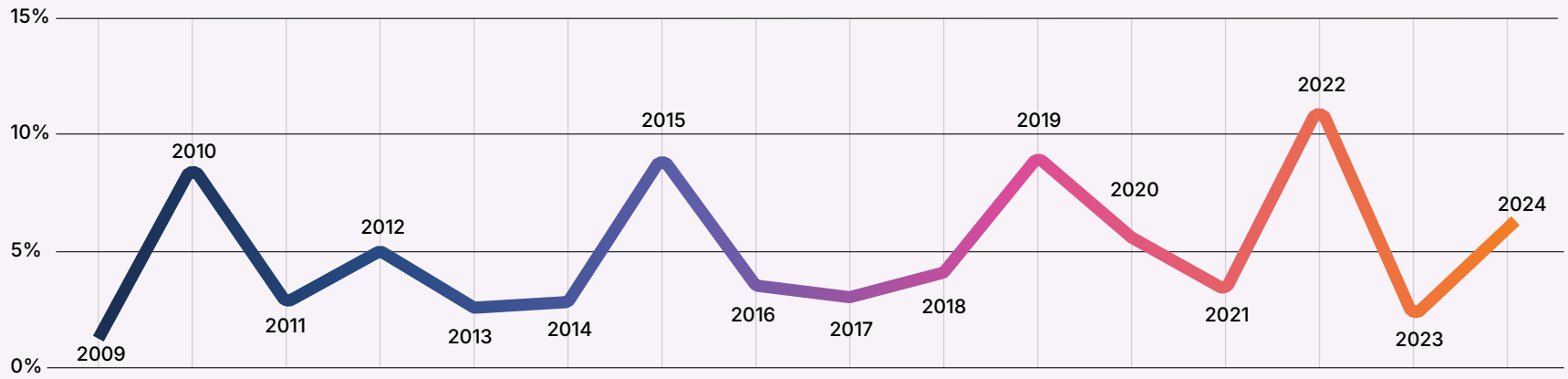
Graph 8 – Europe in the World medical device market

Based upon manufacturer prices, 2024



Graph 9 – European medical device market growth rates

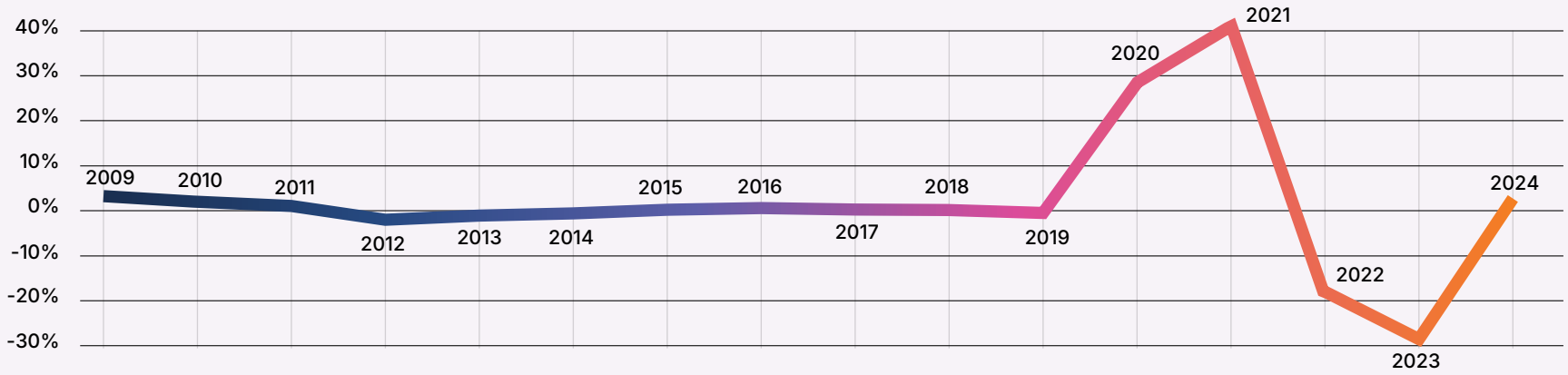
Based upon manufacturer prices, 2009-2024



The European medical device market has been growing on average by **6.0%** per year over the past 10 years. Demand fell in 2009 due to the economic crisis, resulting in a growth rate of only **1%** (the lowest in 14 years). The market regained its momentum in 2010, and since then, the annual growth rate has varied between **2.4%** (2017) and **9.3%** (2015), reaching **6.0%** in 2024.[10]

Graph 10 – European IVD market growth rates

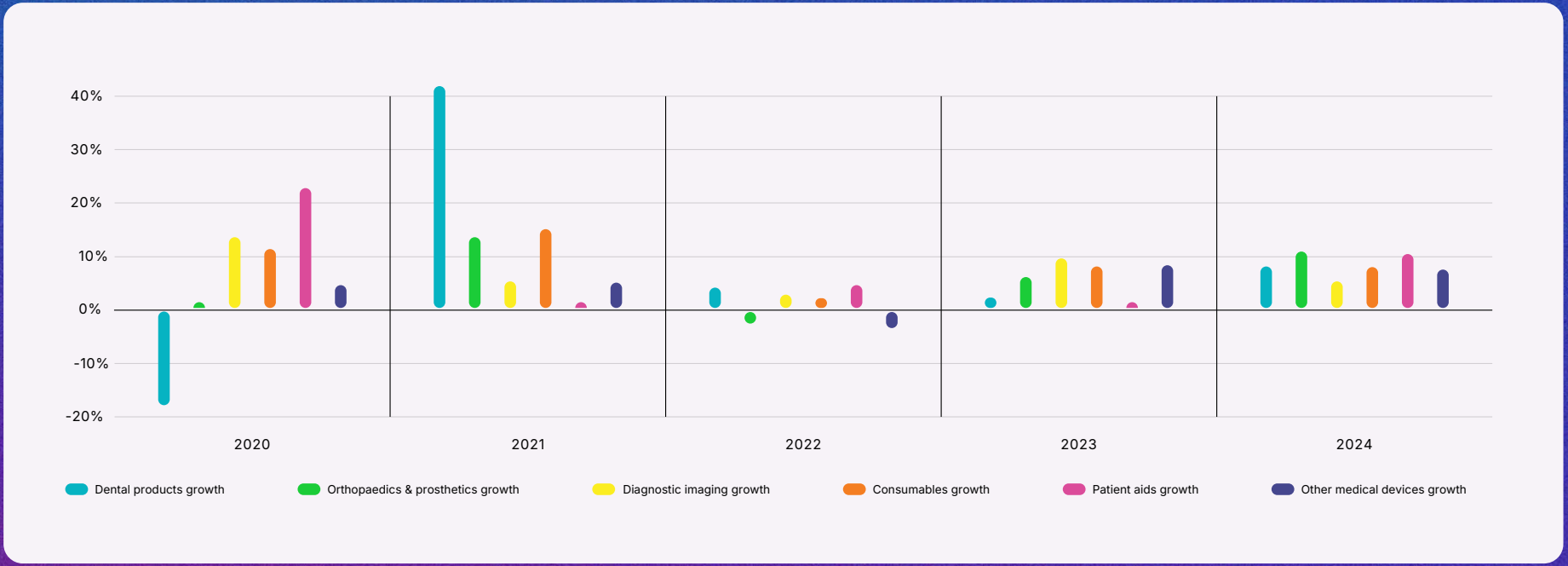
Based upon manufacturer prices, 2024



Demand fell in 2009 due to the economic crisis, resulting in a growth rate of only **1%**. While the 2020-2021 spike in the IVD market size is due to demand resulting from the COVID-19 pandemic, the European market for IVD solutions has been growing **4.3%** on average, hitting the record **40%** in 2021.

Graph 11 – European medical technology growth rates by sectors

Based upon manufacturer prices, 2009-2024



COVID-19 affected the medical technology industry in several ways. In 2020, the postponement of elective surgeries across EU countries led to deferred patient care within the Orthopaedics and Dental fields. In 2023, the industry overcame most of the disruptions caused by the pandemic and returned to pre-COVID-19 growth rates.

On the other end of the spectrum, during pandemic sales of IVDs (e.g. PCR tests), patient aids (artificial respiration apparatus such as ventilators) and consumables (e.g. nasal cannulae, syringes, surgical gloves) increased significantly, as these medical technologies were essential to the special care that severe COVID-19 patients require. In 2024 the IVD segment started returning to its natural level.

Trade in Europe

Europe has a positive medical devices trade balance of **5 billion** EUR in 2024, seeing growth of exports outpaced by the influx of imports from extra-European markets.*

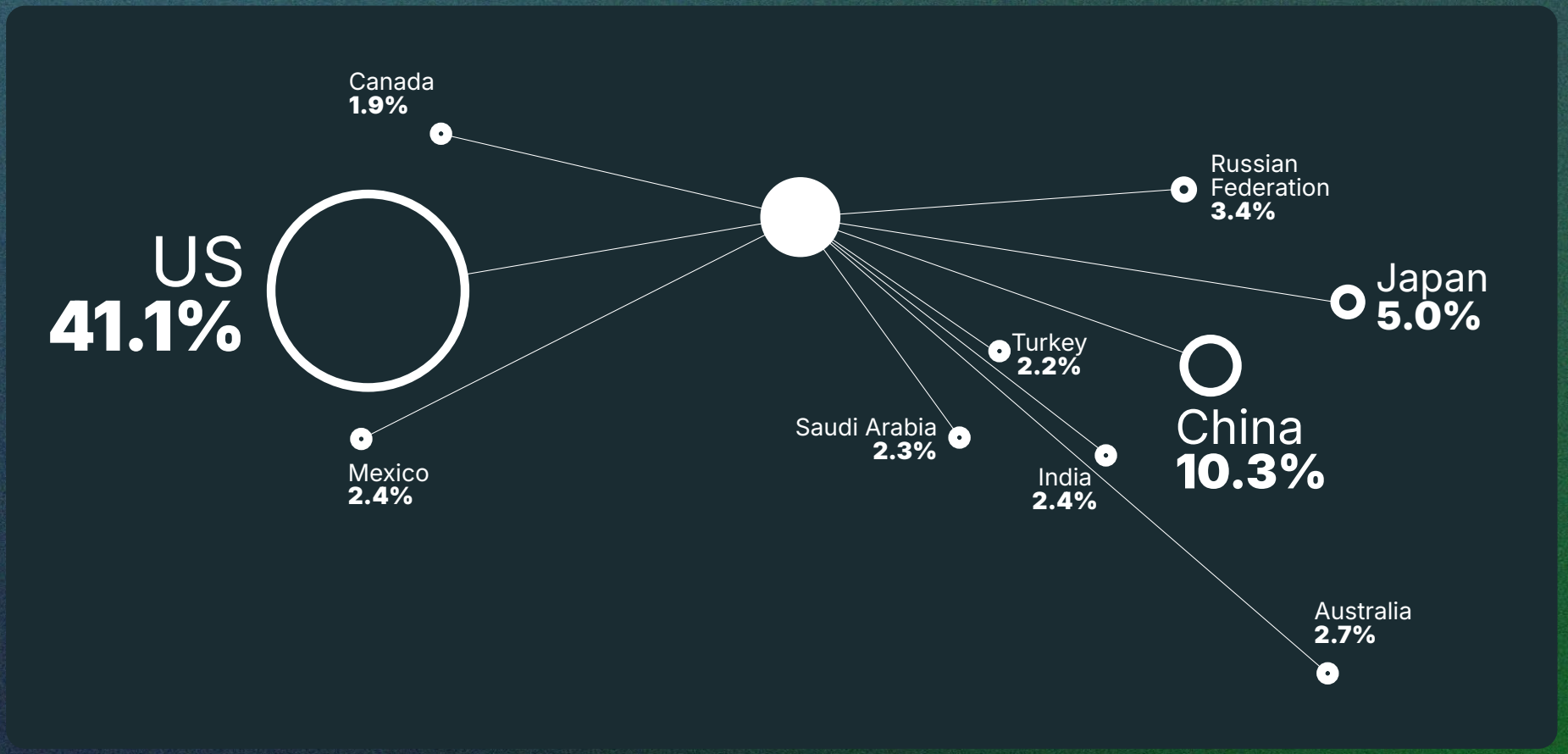
The main European medical device trade partners remain the same as in previous years: the US, China, Japan and Mexico.[11]

*Data has been revised after changes in the Harmonised System, methodology and reporting procedures in the data source.

€5 billion
of Europe's trade surplus in 2024

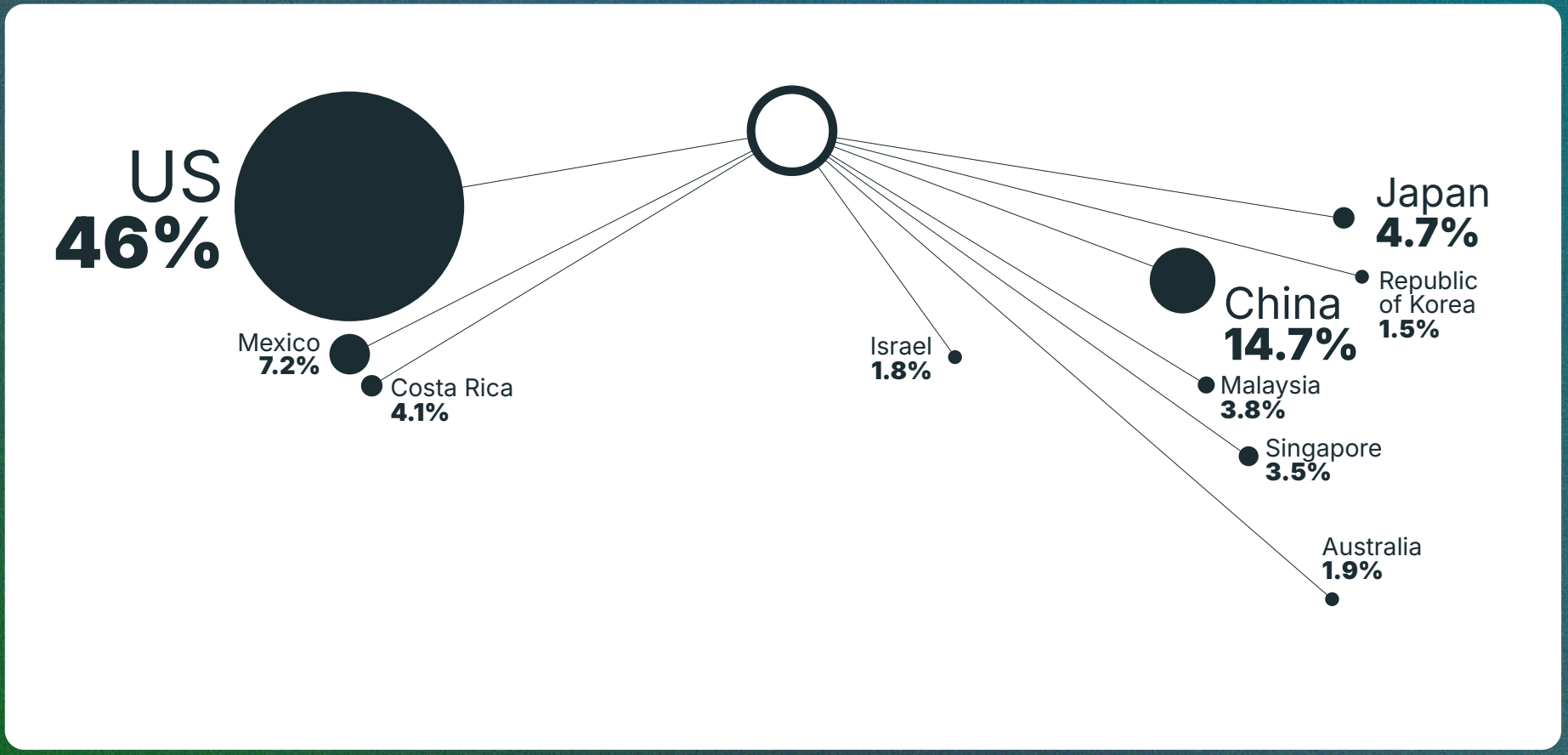
Graph 12 – Top European medical device export destinations

2024



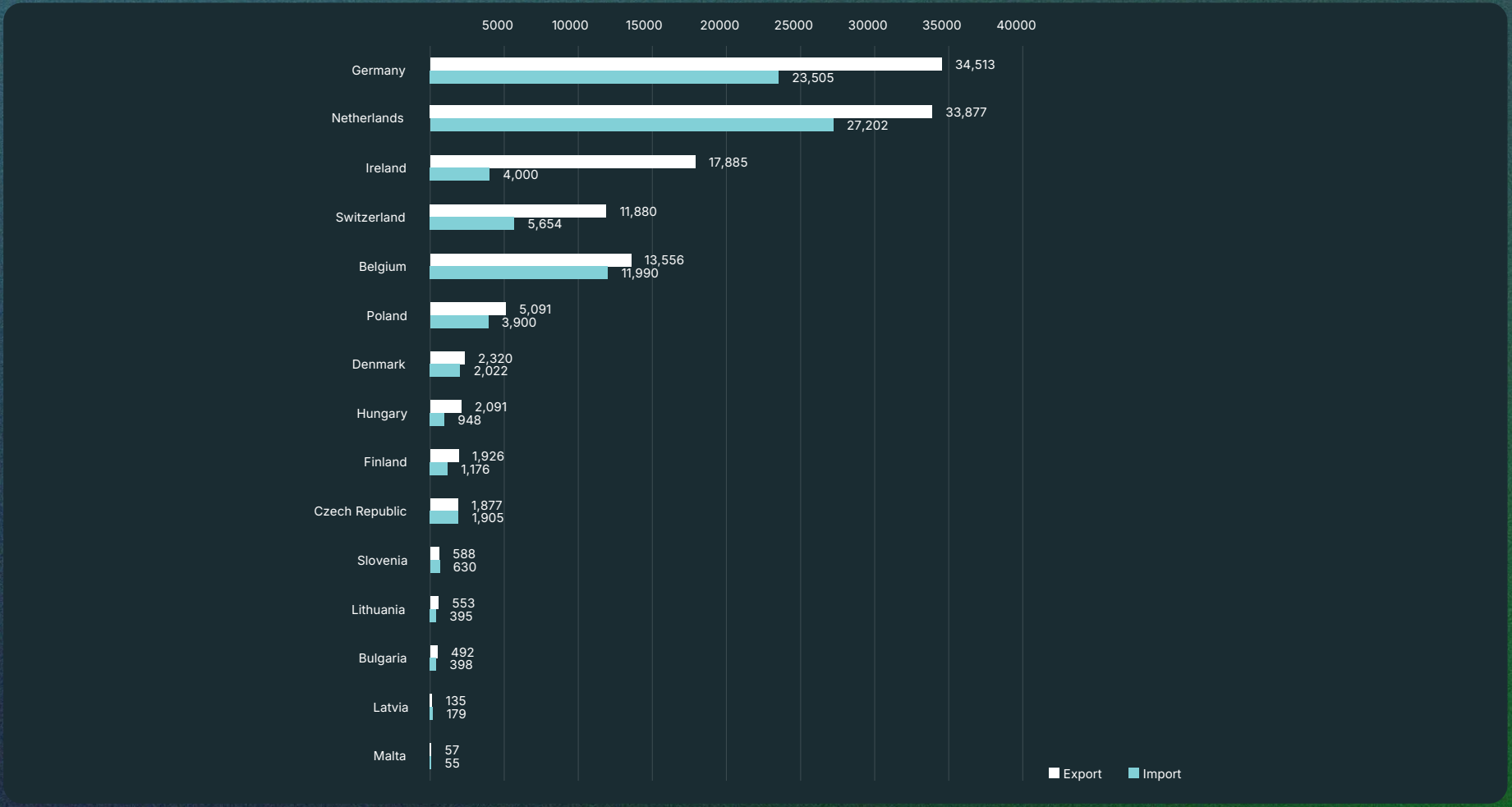
Graph 13 – Top suppliers to European medical device market (imports)

2024



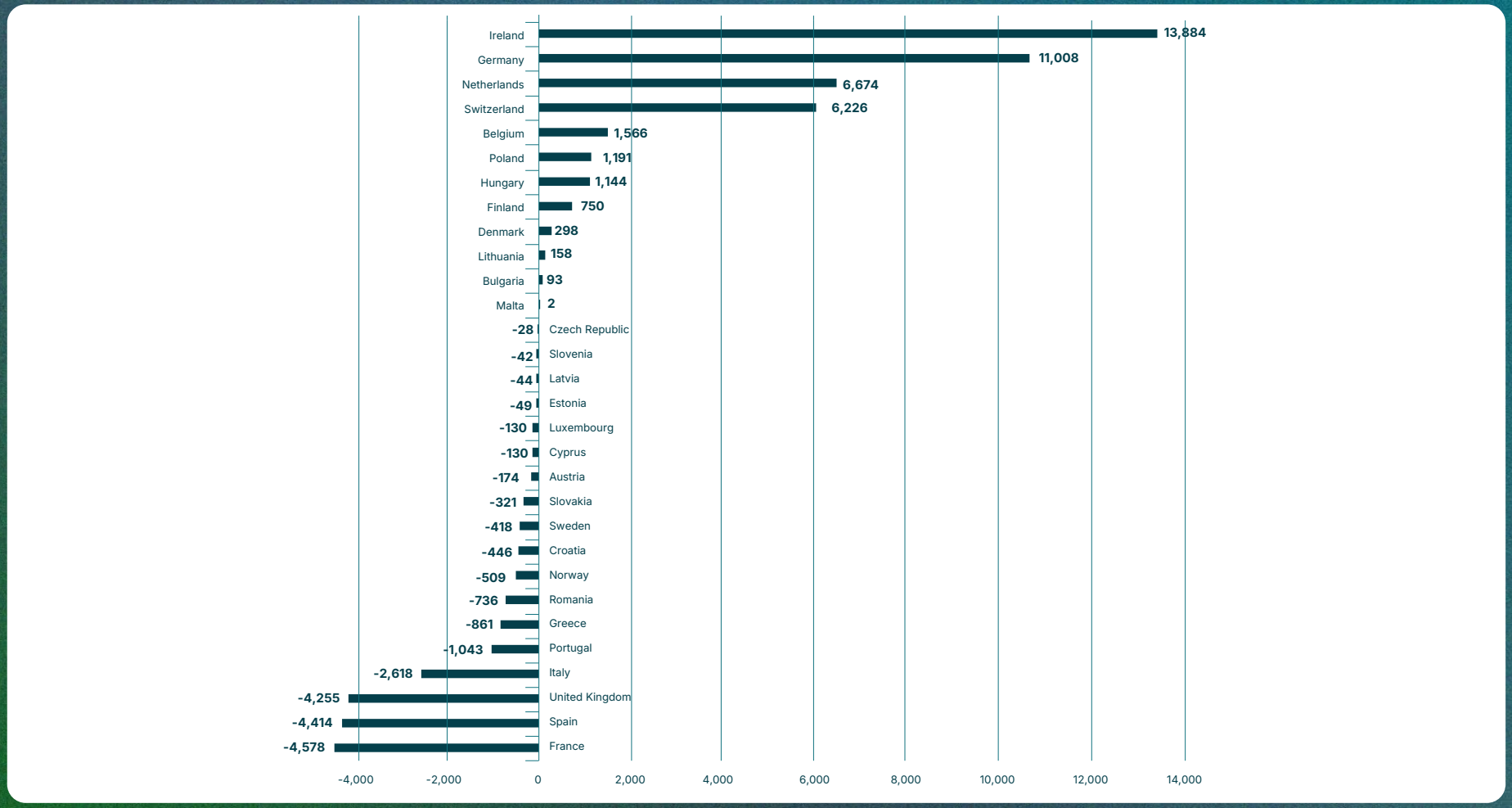
Graph 14 - TOP 15 Export & imports of medical devices by country (including European intra-community trade, million euros)

2024



Graph 15 - Medical device trade balance by country (including intra-community trade million euros)

2024



About MedTech Europe

MedTech Europe is the European trade association representing the medical technology industries, from diagnosis to cure. We represent diagnostics, digital health and medical devices manufacturers operating in Europe.

MedTech Europe's mission is to make innovative medical technology available to more people while helping healthcare systems move towards a sustainable path. MedTech Europe encourages policies that help the medical technology industry meet Europe's growing healthcare needs and expectations. It also promotes medical technology's value for Europe focusing on innovation and stakeholder relations, using economic research and data, communications, industry events and training sessions.

MedTech Europe's Facts & Figures publication is an annually updated report with robust industry data compiled from multiple sources. It is an essential source of data for international stakeholders seeking an up-to-date view of industry innovation and employment, SME activity, expenditure on medical technology, trade flows and market size in Europe.

Our association aims to represent all the relevant actors in the medical technology field including: national associations, corporate members including SMEs. The latter are the drivers of grassroot innovation and bottom-up solutions, vitally maintain and improve European competitiveness in the medical technologies field.

Scope of this report

- In this report, Europe refers to EU27, Norway, Switzerland and the United Kingdom, unless specified otherwise.
- The Innovation chapter defines medical technology following the methodology of the World Intellectual Property Organization (based on the WIPO IPC-Technology concordance as revised in August 2014). Patents are attributed to the applicant's country of residence. EPO countries refer to the 38 member states of the European Patent Organisation.
- The Employment and Companies chapters are based on data from the annual surveys MedTech Europe carries out among its National Association members. The most recent survey was finalised in March 2024. Figures refer to the latest year available. An enterprise is considered to be an SME if it employs fewer than 250 persons and has an annual turnover not exceeding € 50 million (small and micro-sized companies employ fewer than 50 persons and have a turnover of less than € 10 million).
- The Expenditures on Medical Technology chapter is based on MedTech Europe calculations using healthcare statistics from the following sources: EFPIA, Eurostat, Fitch Solutions, WHO.
- The Medtech Market in Europe chapter is based on manufacturers' sales (revenue), not including margins, such as value added in the wholesaling and retailing, transportation costs, some taxes included in the final price, etc.
- The Trade chapter data refers to the medical technology products in the following categories, excluding in vitro diagnostics: orthopaedics & prosthetics, patient aids, dental products, diagnostics imaging, consumables, other medical devices (incl. wheelchairs, ophthalmic instruments, hospital furniture, medical & surgical sterilisers, ultra-violet or infra-red ray apparatus, blood pressure monitors, endoscopy apparatus, dialysis apparatus, transfusion apparatus, anaesthetic apparatus & instruments).

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