

European IVD Market Statistics Report 2025

Overview

MedTech Europe is pleased to publish the market estimates of the In vitro diagnostic (IVD) industry in Europe. The MedTech Europe figures include market size and dynamics information, based on **2023 and 2022 data**. Macroeconomic and healthcare data are also included for the EU27-member states plus the European Free Trade Association members (EFTA) – Norway, Iceland, and Switzerland, as well as for the United Kingdom.

In vitro diagnostics (IVDs) are an essential part of today’s healthcare. **Results of in vitro testing influence as many as 70% of clinical decisions, while IVDs account for less than 1% of healthcare expenditure in the EU-27, UK and EFTA.** IVDs are used to diagnose, monitor, screen and assess predispositions to diseases, thereby contributing to the available medical information regarding a patient. By allowing earlier and more targeted treatments, IVDs help to reduce hospital stays and convalescences, resulting in healthier populations, reduced costs, and economic growth in the long run. They played a vital role in the response to COVID-19 as a critical element for combatting the pandemic.

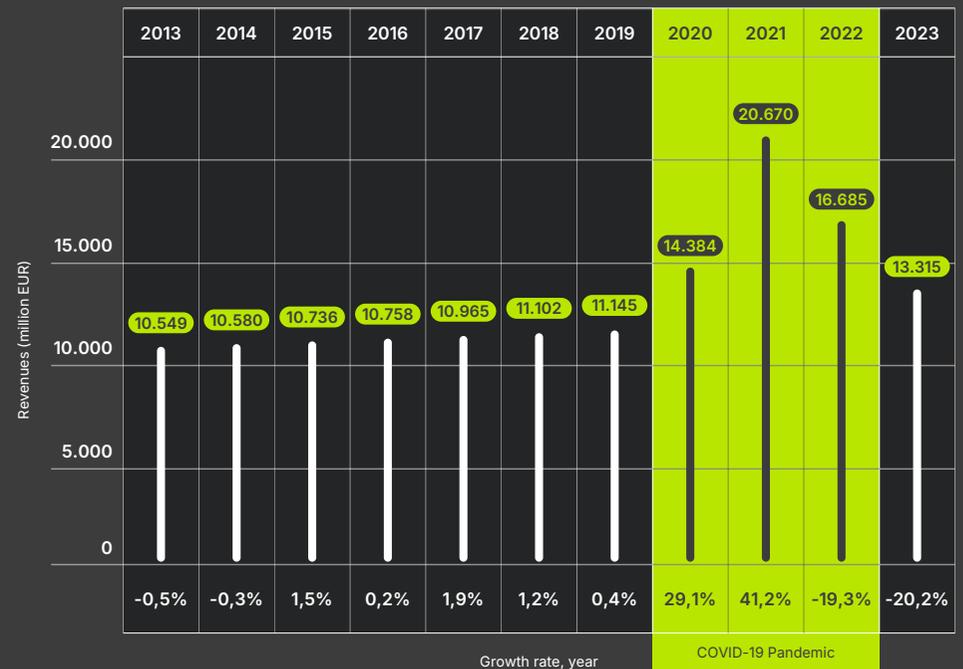
The year 2023 marked a turning point for the European in vitro diagnostics (IVD) sector, as markets across the region transitioned out of the unprecedented COVID-19 era and returned to more stable patterns of demand. **Total IVD market revenues across the EU27, EFTA and the United Kingdom reached €13.3 billion**, a decline of –20.2% compared with 2022. This contraction is driven overwhelmingly by the decrease of COVID-19 testing volumes, which had inflated market sizes throughout 2020–2022. From 2010 to 2019, the European IVD market showed remarkable stability, growing at around 0–2% annually and reaching €11.1 billion in 2019. The COVID-19 pandemic fundamentally altered this pattern. Extraordinary demand for SARS-CoV-2 testing led to unprecedented revenue expansion: +29% in 2020 and +41% in 2021. As pandemic-related testing declined in 2022–2023, the market began returning toward its historical trajectory, falling back from its 2021 peak but remaining above long-term baseline levels.

Europe’s largest markets – Germany (€2.35bn), France (€2.0bn), Italy (€1.71bn), and Spain (€1.37bn) – all observed significant declines compared with 2022. Germany experienced one of the steepest drops (–35.5%), driven overwhelmingly by the disappearance of COVID -19 testing. France (–15.5%), Italy (–10.9%), and Spain (–21.6%) show very similar market dynamics.

The differences in current healthcare expenditure (CHE), both in relative terms to GDP and absolute amounts, demonstrate the wide variation in access to healthcare across the thirty countries in this report.

Western and Northern European countries continue to invest most heavily in healthcare: Luxembourg (€6,946 per capita), Denmark (€6,036), Ireland (€6,361), and Switzerland (€10,967) sit at the top of the spending spectrum. By contrast, Central and Eastern European countries — such as Bulgaria (€1,163 per capita), Romania (€972), and Poland (€1,460) – operate with far more constrained budgets.

The European IVD Market



Relative to GDP Germany and Switzerland are in the leading at 11.7%, followed by the UK, France, Austria, Sweden. In absolute amounts the healthcare expenditure per capita – Switzerland is in first position, followed by Norway, Luxembourg, Iceland, Ireland, and Denmark. The IVD per capita expenditure also shows a wide variation from a low of €4.1 in Bulgaria to €63.7 in Switzerland, which remains also the leading country.

IVD Market Statistics

The applied exchange rates are the 2023 annual average exchange rates published by The European Central Bank. Applying a single exchange rate to both 2022 and 2023 sales data eliminates possible fluctuations of market size and market growth due to exchange variations.

The 2023 data regarding population and GDP are the latest available from Eurostat. The figures regarding current healthcare expenditure are the latest available from Eurostat and OECD.

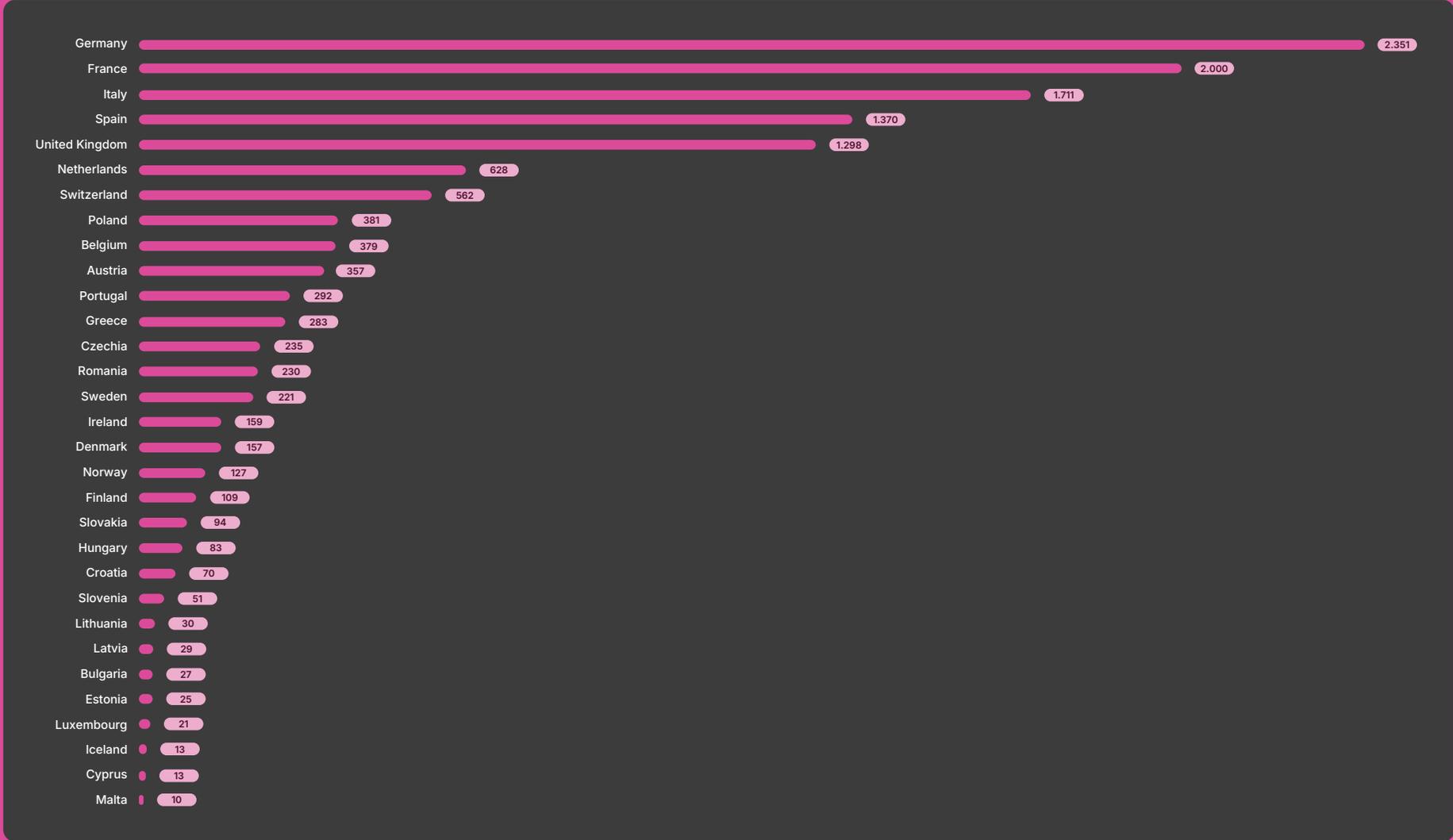
Countries	Population 2023	GDP 2023	GDP / capita 2023	Current healthcare expenditure (CHE), 2023	CHE / capita		IVD mkt. 2023	IVD mkt. 2022	IVD mkt. growth rate 23-22	IVD mkt. /CHE 2023	IVD mkt / capita 2023
	1000	Mio €	€	Mio €	€	%	Mio €	Mio €	%	%	€
	Source: Eurostat			Source: Eurostat, OECD			Source: MedTech Europe				
Germany	83.119	4.185.550	50.356	491.563	5.914	11,7%	2.351	3.644	-35,5%	0,5%	28
France ¹	68.277	2.822.455	41.338	325.140	4.762	11,5%	2.000	2.367	-15,5%	0,6%	29
Italy	58.997	2.131.390	36.127	179.156	3.037	8,4%	1.711	1.919	-10,9%	1,0%	29
Spain	48.085	1.498.324	31.160	138.155	2.873	9,2%	1.370	1.747	-21,6%	1,0%	28
Netherlands	17.811	1.067.599	59.939	104.961	5.893	9,8%	628	714	-12,1%	0,6%	35
Greece	10.414	225.197	21.624	18.902	1.815	8,4%	283	327	-13,5%	1,5%	27
Portugal	10.517	267.923	25.476	26.866	2.555	10,0%	292	355	-17,9%	1,1%	28
Belgium	11.743	596.203	50.772	64.412	5.485	10,8%	379	390	-2,9%	0,6%	32
Sweden	10.522	541.184	51.436	60.358	5.737	11,2%	221	249	-11,1%	0,4%	21
Austria	9.105	473.227	51.976	52.779	5.797	11,2%	357	425	-16,0%	0,7%	39
Denmark	5.933	376.430	63.451	35.809	6.036	9,5%	157	243	-35,5%	0,4%	26
Finland	5.564	272.782	49.027	28.571	5.135	10,5%	109	154	-29,3%	0,4%	20
Ireland	5.271	509.952	96.739	33.531	6.361	6,6%	159	247	-35,6%	0,5%	30
Luxembourg	661	80.992	122.565	4.590	6.946	5,7%	21	20	5,0%	0,5%	32
Poland	36.754	751.932	20.459	53.677	1.460	7,1%	381	408	-6,5%	0,7%	10
Romania	19.055	324.369	17.023	18.518	972	5,7%	230	231	-0,4%	1,2%	12
Czechia	10.828	317.386	29.313	26.745	2.470	8,4%	235	300	-21,7%	0,9%	22
Hungary	9.600	197.902	20.615	12.604	1.313	6,4%	83	123	-32,8%	0,7%	9
Bulgaria	6.448	94.709	14.689	7.500	1.163	7,9%	27	27	-1,7%	0,4%	4
Slovakia	5.429	123.833	22.810	9.105	1.677	7,4%	94	125	-25,2%	1,0%	17
Croatia	3.851	78.060	20.271	5.579	1.449	7,1%	70	74	-5,9%	1,2%	18
Lithuania	2.857	73.793	25.826	5.401	1.890	7,3%	30	33	-7,2%	0,6%	11
Latvia	1.883	39.372	20.909	2.865	1.522	7,3%	29	39	-25,7%	1,0%	15
Slovenia	2.117	63.951	30.209	5.948	2.809	9,3%	51	75	-31,9%	0,9%	24
Estonia	1.366	38.188	27.958	2.853	2.089	7,5%	25	38	-33,6%	0,9%	19
Cyprus	949	31.340	33.021	2.545	2.681	8,1%	13	15	-13,3%	0,5%	14
Malta	542	20.541	37.896	1.816	3.351	8,8%	10	12	-16,7%	0,6%	18
EU27	447.695	17.204.583	38.429	1.719.949	3.842	10,0%	11.315	14.302	-20,9%	0,7%	25
Switzerland	8.815	826.952	93.808	96.679	10.967	11,7%	562	638	-12,0%	0,6%	64
Norway	5.489	446.534	81.351	44.880	8.176	10,1%	127	276	-53,8%	0,3%	23
Iceland	388	29.093	75.028	2.533	6.531	8,7%	13	13	0,0%	0,5%	34
EFTA	14.692	1.302.578	88.658	144.091	9.807	11,1%	702	927	-24,3%	0,5%	48
United Kingdom ²	68.265	2.916.168	42.718	336.210	4.925	11,5%	1.298	1.456	-10,8%	0,4%	19
TOTAL (EU27, EFTA, UK)	530.653	21.423.330	40.372	2.200.250	4.146	10,3%	13.315	16.685	-20,2%	0,6%	25

1) France data includes only the Central Laboratory IVD Market (excludes diabetes).

2) UK data reflects the consolidated sales of the participating companies in GDMS, plus the figures published by NHS England for glucose test strip sales adjusted to represent the whole of the UK.

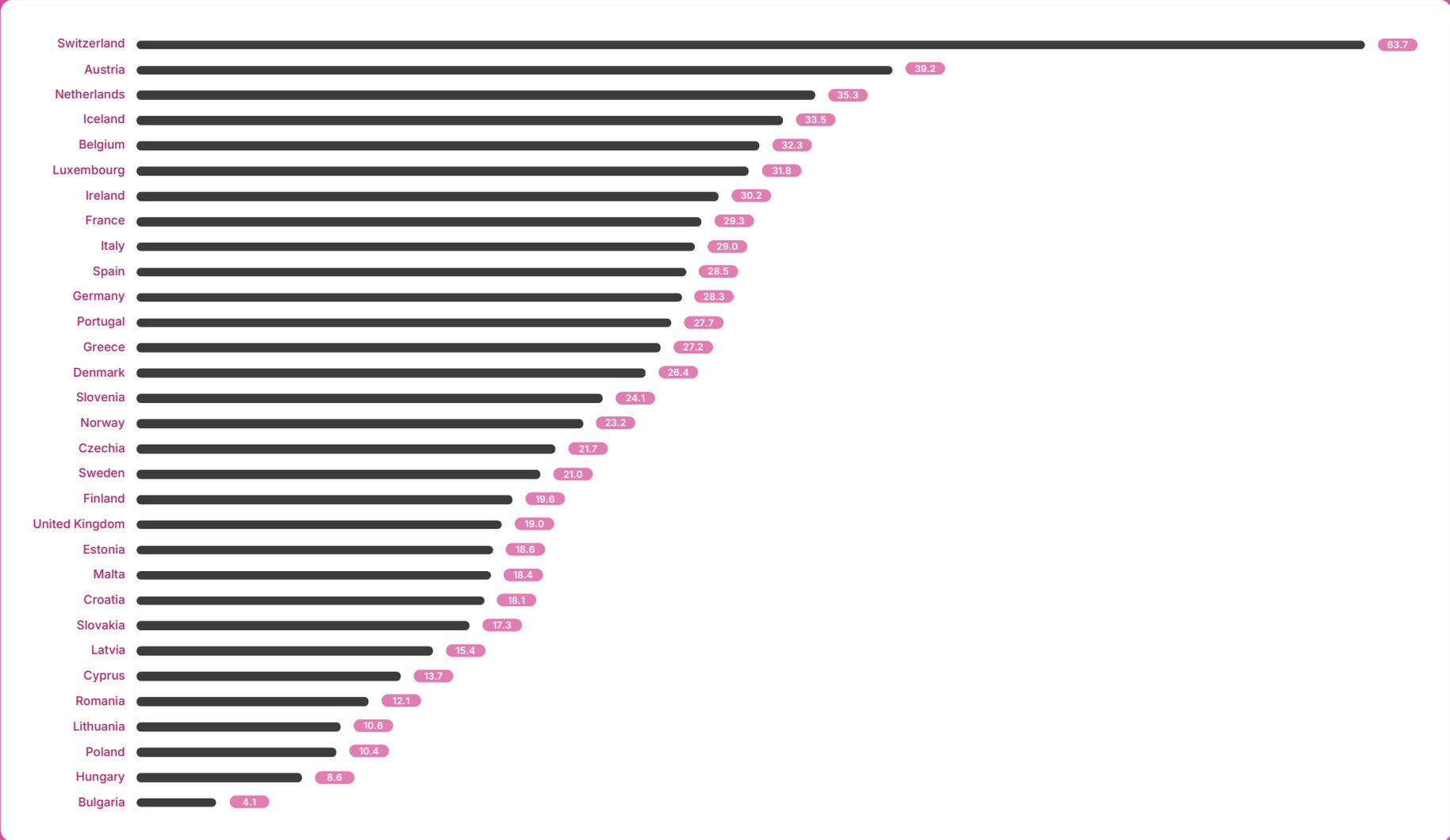
Country Specific Data

IVD market size 2023 (million EUR)



Country Specific Data

IVD Market per capita 2023 (EUR)



Germany

-35.5% IVD MARKET 2,351 MEUR

"The multi-year comparison shows the peak of the pandemic in 2021, when coronavirus diagnostics accounted for 65 per cent of IVD sales on the German market. The decline to the market volume in 2023 was correspondingly steep, with sales of corona diagnostics shrinking to € 100 million and accounting for less than 5 per cent of the total market. The German IVD market in 2023 amounts to €2,351 million. This corresponds to a market decline of 35 per cent and a corona-adjusted decline of 4.3 per cent. In the blood glucose measurement segment, there continues to be a sharp decline in sales of test strips. More and more people with diabetes are carrying out self-measurement using sensor-based methods (CGM). If this effect is also factored out, the overall decline in the market is still 2.3 per cent. Growth of 4 per cent in immunochemistry and microbiology (both reagents) contrasts with stagnation in the haematology/histology/cytology market segment. The instrument market recorded a double-digit decline in sales in 2023; saturation effects from previous years are still noticeable here." - [VDGH, German IVD industry association](#)

France

-15.5% IVD MARKET 2,000 MEUR

"The 2023 Central Laboratory IVD French market (excluding diabetes) is estimated at 2,000 million Euro, with a decrease of -15.5 % compared to 2022. This decrease is driven mainly by the decline of SARS-CoV-2 testing and to recovery of pre-Covid lab activity." - [SIDIV, French IVD industry association](#)

Italy

-10.9% IVD MARKET 1,711 MEUR

"The IVD Italian market, in 2023 recorded a decrease of -10.9%. This dynamic, is to be mainly attributed to the decrease in COVID-19 diagnostics. Further decline in the market was observed in microbiology, genetic testing and instruments. Immunochemistry segment, on the other hands, has seen some increase compared to 2022."- [Confindustria Dispositivi Medici, Italian IVD industry association](#)

Spain

-21.6% IVD MARKET 1,370 MEUR

"Spanish market perspectives are positive as the market settles after the COVID storm. Laboratories have gained more personnel and more attention from hospital management and administration. Recognition of the value of in vitro diagnostics has taken a step forward.

COVID-related sales are now almost irrelevant, with a strong decline, and are expected to stabilise at this minimal level in the future. The market continues to show concentration at both the industry and laboratory levels, and despite limited room for further consolidation, it is expected to follow the same trend.

Point of care testing development is below expectations, mainly due to the lack of reimbursement outside hospitals and primary care centres. Despite the overall market decline, if we consider sales excluding COVID tests, the data show a fairly consistent recovery in line with the consolidated trend expected for the future.

The recent incorporation of genetic testing and biomarkers into the Spanish Catalogue of Genetic Testing strengthens molecular diagnostics and sequencing. This catalogue is being updated and is incorporating new tests as sufficient evidence becomes available.

The number of determinations is growing slightly, while prices are declining or remaining flat."- [FENIN, Spanish IVD industry association](#)

United Kingdom

-10.8% IVD MARKET 1,298 MEUR

"Half of the decline in IVD revenues (£65m) is due to the reduction in specific testing for Coronavirus following the lifting of most restrictions, the success of the vaccination programme, and the decreased number of cases resulting from immunity gained through exposure to the virus. Within this overall decrease is NAT testing for multiple parameters (-£55m, -40%), which had been greatly increased during the pandemic. Respiratory infection testing by NAT dropped by 60% (-£120m), including RSV and 'flu testing, as well as multiplex testing that includes Covid targets.

These decreases are offset partly by the resumption of elective treatments and the recovery of normal clinical services. The total IVD market excluding all Coronavirus testing decreased by 0.75% to £1,007m, and reagents excluding all Coronavirus testing fell by 0.83% to £857m. Core laboratory reagents, instruments, and consumables market revenues (GDMS group code 219) recovered a further £34m (+7%), while the Laboratory market (GDMS group code 900) decreased by £73m (-8%). Microbiology revenues increased by £3m (+15%), and these figures are now much more representative of the total UK market." - [BIVDA, British IVD industry association](#)

Belgium

-2.9% IVD MARKET 379 MEUR

"The 2023 IVD market in Belgium reached 379 million EUR with a negative growth of -2.9 % compared to 2022. This is far below the peak market level in 2021, when the expenses in the hospitals and ambulant setting were increased due to the Covid-19 pandemic." - [beMedTech, Belgian IVD industry association](#).

Austria

-16.0% IVD MARKET 357 MEUR

"The market dynamic, in 2023, was determined mostly by the decrease of the SARS-CoV-2 Testing (PCR and Antigen testing) due to the very extensive testing strategy by the government in the previous years. The classical laboratory market recovered and went basically back to the pre-pandemic level with a small increase." – [AUSTROMED, Austrian IVD industry association](#)

Portugal

-17.9% IVD MARKET 292 MEUR

"During 2023 the market decreased, due to the level of Covid-19 tests that have been performed. The routine business decreased around -2,7%. The collections continue to be a topic on the IVD market, we closed 2023 with 300 days of payment terms." – [APIFARMA, Portuguese IVD industry association](#)

Czechia

-21.7% IVD MARKET 235 MEUR

"Generally the IVD market is recovering after the Covid-19 pandemic. The market decrease observed in 2023 in the Czechia has been driven by the decrease infectious disease testing. However, market growth is observed in all other IVD segments signalling stabilising healthcare environment and reimbursement system." – [CZEDMA, Czech IVD industry association](#).

Data Gathering

The results presented above are based on individual 2022 and 2023 estimates made for 27 countries, comprising of the EU countries, EFTA countries, and the UK.

- 13 countries are participating in the Global Diagnostic Market Statistics (GDMS, former EDMS) programme: Austria, Belgium, Czech Republic, France, Germany, Italy, the Netherlands, Poland, Portugal, Slovakia, Spain, Switzerland, and the UK.
- The National Association Members of MedTech Europe and the MedTech Europe's Market Research Committee have estimated the IVD market in 18 other countries not participating in the GDMS programme: Bulgaria, Croatia, Cyprus, Denmark, Estonia, Finland, Greece, Hungary, Iceland, Ireland, Latvia, Lithuania, Malta, Norway, Romania, Slovenia, Sweden.

The figures per country are compiled from the Global Diagnostic Market Statistics (GDMS) programme, through which companies report invoiced sales of reagents, instruments and consumables to an independent auditor, CIP, as based on the Global IVD Classification (GIVD). This is done in association with the MedTech Europe's Market Research Committee and the National Association Members. Although most of the molecular tests for Coronavirus have been captured in the programmes as they are supplied by participating companies, there are revenues on Rapid Tests purchased directly through national government arrangements from non-participant companies which might not be all captured in this report.

More than 85% of the market is covered in major countries by GDMS, ensuring the reliability and objectiveness of the information provided by MedTech Europe and its members. MedTech Europe encourages all IVD suppliers and countries to participate in the GDMS programme, which is the largest In vitro diagnostic audit in Europe and the most accurate source of information for understanding and predicting market trends.

About In Vitro Diagnostics

In vitro diagnostics are non-invasive tests performed on biological samples (for example blood, urine or tissues) to diagnose or exclude a disease. IVDs provide valuable information about how the body is functioning and its state of health. They are used for diagnosis, prognosis, risk stratification, screening and therapeutic monitoring of diseases. IVDs have a broad scope ranging from sophisticated technologies performed in clinical laboratories to simple self-tests, such as those for pregnancy and glucose monitoring.

About MedTech Europe

MedTech Europe is the European trade association for the medical technology industry including diagnostics, medical devices and digital health. Our members are national, European and multinational companies as well as a network of national medical technology associations who research, develop, manufacture, distribute and supply health-related technologies, services and solutions. 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.

The European in vitro diagnostic industry is driven by research and development. Almost 95% of the industry is comprised of small and medium size enterprises and approximately 1 billion euros per year is reinvested in R&D. Developed by MedTech Europe, the Global Diagnostic Market Statistics (GDMS) and Management Information System (MIS) programmes provide a comprehensive overview of the latest market trends based on the Global IVD Product Classification (GIVD).



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