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The European Medical Technology Industry in numbers

MedTech Europe
from diagnosis to cure

Insights That Drive Us Forward

A message from our CEO

The data in this edition tells a story of resilience in the face of adversity. Europe's medtech sector is innovating and hiring at record levels: employment has passed 950,000, patent filings remain at all-time highs, and our innovation efficiency continues to outperform every comparable sector.

Yet Europe's global position is narrowing. Spending on medical technology here grew just 1.8% in 2025, against a decade average of around 6% and below faster-moving markets. Europe now holds 25.6% of the world medtech market, down from 26.4% a year earlier and close to 29% in 2015. The constraint isn't our capacity to invent, it's Europe's shrinking share of places where innovation is adopted, reimbursed and scaled.

The sector's strength isn't in question; whether Europe still rewards it is. Much of the answer lies in a regulatory system that hasn't kept pace. The revision of the Medical Devices Regulation (MDR) and In Vitro Diagnostic Medical Devices Regulation (IVDR), under negotiation as this report went to press, is the clearest opportunity in a decade to restore speed and predictability without loosening patient safeguards. AI makes this urgent. AI-enabled diagnostics already used in European hospitals must simultaneously satisfy medical device rules, the AI Act, data protection, cybersecurity and the European Health Data Space, with no binding mechanism to align them. Europe can fix this without lowering protections: assess how new rules interact with the sectoral framework before adopting them, resolve inconsistencies in the legislative text rather than later guidance, and let compliance demonstrated once under the MDR or IVDR count across the rest.

Public procurement, a key part of market access, is tightening too. Constrained budgets and ageing populations now weigh on investment as much as regulation, even though medtech absorbs less than 1% of Europe's GDP. Purchasing priorities are shifting toward supply security, long-term value and sustainability, the last of which can't be delivered by pressuring suppliers alone, since only 5 to 10% of sector emissions sit under companies' direct control.

This report records Europe's first-ever fall in company numbers, and smaller companies, some 90% of the industry, are least able to absorb compliance costs and price-driven purchasing simultaneously. Rewarding value over price alone is the correction Europe needs.

These figures show what our sector can do. Whether they reach patients in Milan or Warsaw depends on choices made in Brussels and every Member State. I invite you to explore this year's insights and join us in making the case for smarter regulation as the foundation for a stronger, safer and more competitive European medtech sector.

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 performed on samples taken from the human body (for example, blood, urine or nasal swabs) to provide medically useful information.

Digital health

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

Medical technologies range from simple objects used in daily life to highly advanced devices used in clinical and laboratory settings. Everyday items such as sticking plasters, syringes, surgical masks, spectacles, wheelchairs, self-tests and medical apps support basic care, prevention or monitoring. At the other end of the spectrum are complex technologies that require sophisticated engineering and biomedical science, including gene mutation tests, implantable devices like heart valves and pacemakers, and artificial joints for knees and hips.

Medical technologies benefit society as a whole. They enable people to live longer while improving their quality of life, and they strengthen healthcare systems, making them more efficient and sustainable, both economically and environmentally.

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.

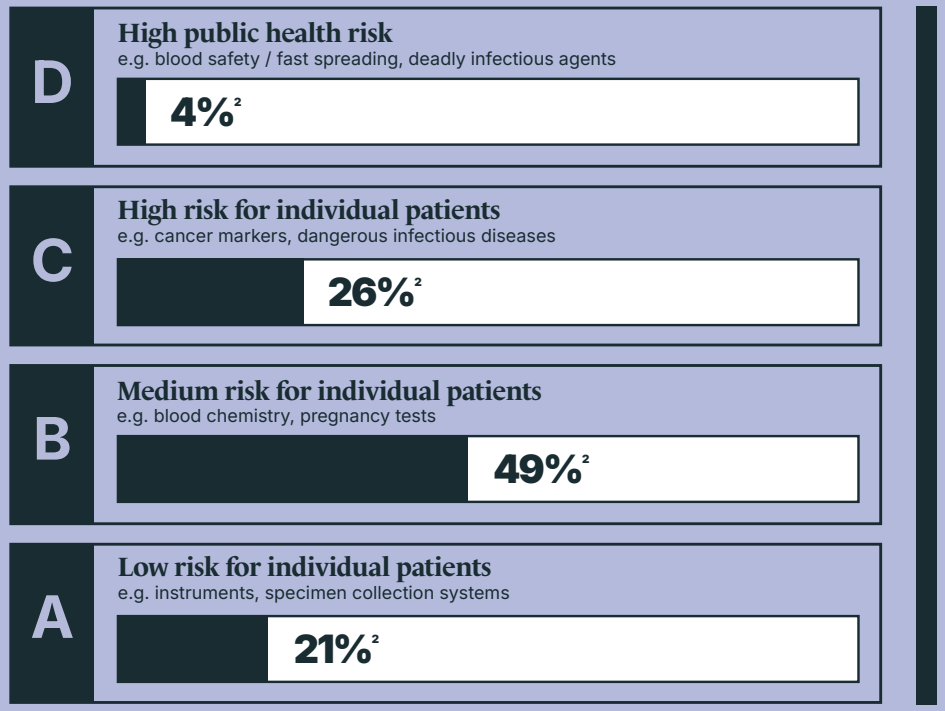
Regulations

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 sector operates under two main sector-specific regulations: the Medical Devices Regulation (MDR) and the In Vitro Diagnostic Medical Devices Regulation (IVDR). Some 70 to 80 other EU regulations and directives also apply to specific aspects of the medical technologies industry (for example, in areas such as machinery, electromagnetic compatibility, artificial intelligence, data protection, European health data space, public procurement, product liability and hazardous substances).

Classification of In Vitro Diagnostic Medical Devices

Under the IVDR, IVDs are classified according to the risk the device poses to public or individual health as a 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 D tests mainly fall into two categories: those related to blood, cell, tissue or organ screening for donors and recipients, and those related to the management of life-threatening infectious diseases. Class A covers low-risk devices such as IVD instrumentation, specimen receptacles and products for general laboratory use. Classification determines the level of involvement by a third party (the "notified body") in assessing IVDs pre- and post-market, as well as applicable reporting requirements. Class D IVDs are additionally subject to evaluation by EU Reference Laboratories and may be subject to expert panel review.

IVD Regulation classification system



Classification of Medical Devices

Under the Medical Devices Regulation, medical devices are classified into four classes: I, IIa, IIb and III, following a risk-based system linking device class to the potential risk posed by a fault or performance issue, with class III the highest risk.

Classification drives pre- and post-market requirements: the level of third-party ("notified body") control before market placement depends on the device's potential impact on the human body, and the same notified body is involved post-market to ensure continued safety and performance. The highest-risk devices, such as implantable devices, may additionally be subject to expert panel review before certification.

Class I

e.g. simple bandages or wound care products

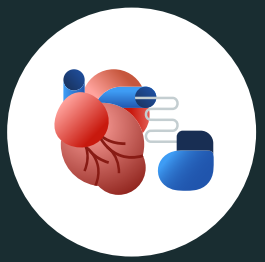
Class IIa

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 innovation, driven by high levels of research and development (R&D) and close cooperation with users and patients. **Latest studies show that the average global R&D investment rate** (R&D expenditure as a share of revenue) in the medical technology sector is estimated at **6.5–7%,**[2] rising to approximately **10% among the 100 largest medical technology companies.**[3] This is a revision from the roughly 8% cited in the 2025 edition; the change reflects a shift to newer, more broadly corroborated source data rather than a genuine one-year swing in R&D spending, and, as with other R&D benchmarks drawn from periodic studies, should be read as a multi-year estimate rather than an annual figure.

In 2025, more than **15,900 patent applications** were filed with the European Patent Office (EPO) in the field of medical technology, a **1.3% increase on 2024 filings**, reversing the previous year's trend.[4] The sector accounts for **7.9% of all EPO applications**, the fourth-highest share of any industrial sector in Europe, behind digital communication, computer technology, and electrical machinery and energy. Of 2025's applications, **39.7% originated from EPO member states**, **39.7% from the US**, and the remaining **20.6% from elsewhere**.

Medical technology also stands out for the share of applications that result in granted patents:

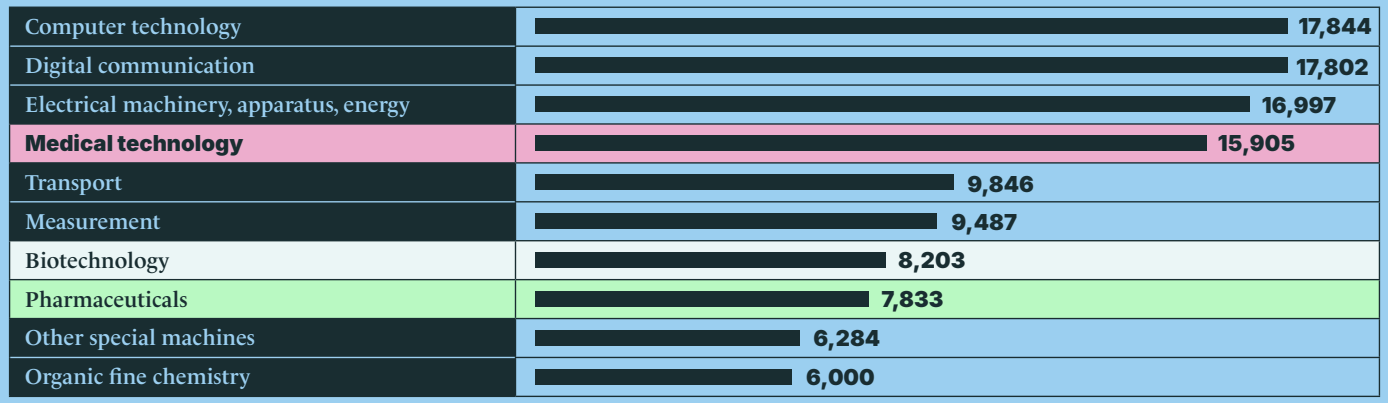
Medical technology recorded more patents granted than any other field in 2025 (12,310).

Its granted-to-application ratio stood at 77.4%, against 38.6% in pharmaceuticals and 21.5% in biotechnology.

Application volumes tell the same story: pharmaceuticals filed around 7,800 applications and biotechnology around 8,200, both growing far more slowly over two decades, while **medical technology filings have doubled over the same period.**

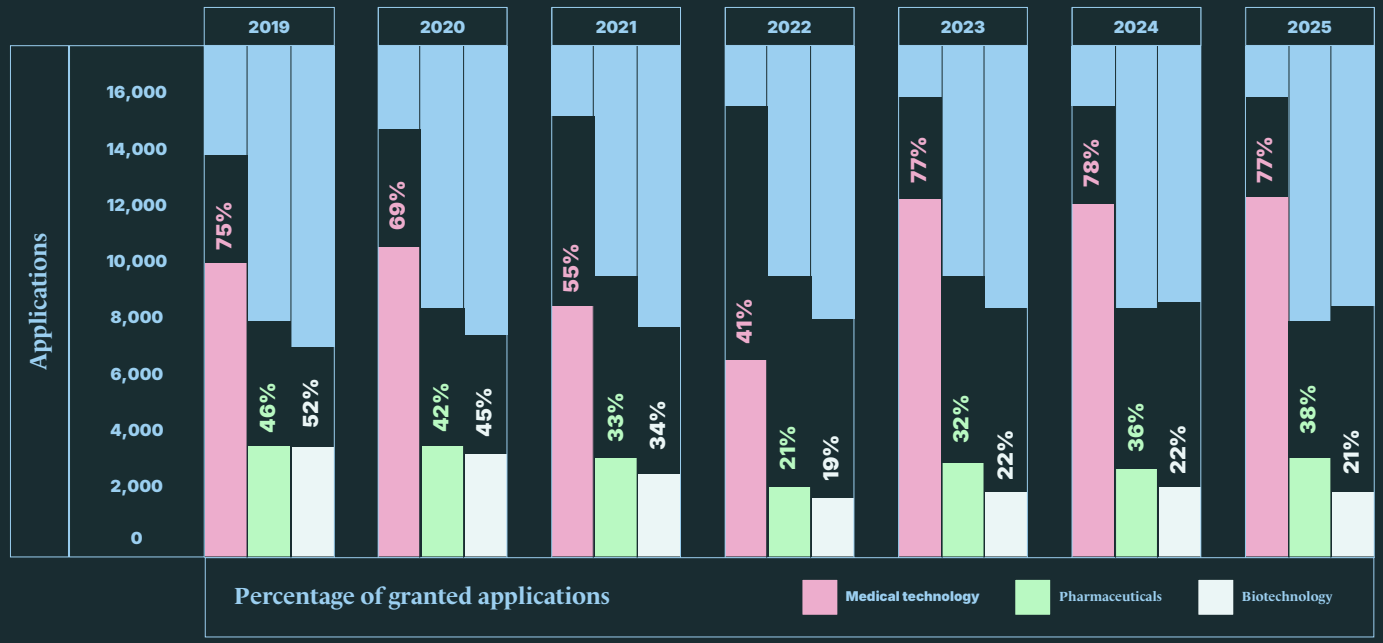
That combination, rising filings and an unmatched grant rate, is a strong signal of Europe's continued strength in medical technology invention, even as broader market conditions tighten.

Graph 1 – Top 10 technical fields in patent applications



Number of patent applications filed with EPO, 2025 (ref. 3)

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



Number of patent applications filed with EPO, 2025 (ref. 3)

Digital Health

Digital health reimbursement in Europe is moving from experimentation to routine care. Led by Germany's maturing DiGA ecosystem and accelerated by emerging frameworks in France, Belgium and Switzerland, routine coverage of digital solutions is a growing reality.

Momentum is building across Europe

Germany remains the benchmark, with the largest number of reimbursed digital health solutions:

- **Six new DiGA** were approved in 2025.
- Of the **59 active DiGA listed at the end of 2025, 50 are permanently listed** and nine remain provisional.
- Nearly **70% of DiGA initially provisionally listed in the BfArM directory achieved permanent listing** after a successful trial year.

France's dual-track system combines:

- National coverage for remote monitoring through the LATM (Liste des Activités de Télésurveillance Médicale), which in 2026 includes 37 brand-specific codes and 60 generic codes issued for digital services
- The early-access reimbursement pathway PECAN (Prise en Charge Anticipée Numérique) for digital therapeutic medical devices. Three years since PECAN's launch, 11 submissions have been made, seven opinions issued, and four solutions have received a favourable outcome.

Moreover, 2026 marked the first-ever digital solution approved for routine reimbursement via the List of Reimbursable Products and Services, a step forward for the French digital ecosystem.

Belgium launched national reimbursement of m-health solutions in January 2025 and has since moved to operational coverage, with seven health apps reimbursed for chronic heart failure from February 2025 and five additional apps added for oncology remote monitoring in April 2026.[5]

What is the DiGA scheme?

DiGA, short for Digitale Gesundheitsanwendungen, is Germany's pathway for prescribing digital health applications on statutory health insurance. Introduced under Germany's Digital Healthcare Act, the scheme lets doctors prescribe approved apps in the same way they would prescribe conventional treatments, with the cost covered by statutory insurance.

Germany's Federal Institute for Drugs and Medical Devices (BfArM) classifies DiGA as medical devices that support the detection, treatment or alleviation of disease, or help manage injuries and disabilities. BfArM describes the model simply: a digital tool placed directly in patients' hands.

Switzerland has taken its first concrete step towards reimbursing digital health solutions. Since 1 July 2026, the MiGeL list of medical devices and supplies has included a new dedicated chapter for digital health applications, with the first generic category covering cognitive behavioural therapy for depression.[5]

Digital health is no longer optional, and neither is regulatory coherence.

Digital health's rapid growth across Europe shows what's possible when reimbursement pathways keep pace with innovation. For the growing share of these solutions that are AI-enabled, that pace depends on regulatory coherence.

Number of digital solutions reimbursed through Innovative Payment Schemes **by indication area, 2025**

Source: reference 5

Indication	Germany (DiGA)	France (PECAN)	Belgium (M-Health)
Mental health	30	—	—
Metabolic disorders	5	—	—
Musculoskeletal diseases	8	1	—
Nervous system	3	—	—
Oncology	2	2	1
Cardiovascular	2	—	2
Urogenital system	6	—	—
Diseases of the ear	2	—	—
Digestive system	1	—	—
Other (remote monitoring; multiple indications)	—	1	12
Total	59	4	15

These figures illustrate the pace at which reimbursement pathways for digital health are developing rather than a definitive or fully comparable inventory of solutions on the market; absolute counts can vary significantly from one year to the next, as seen with France, and are not intended for precise cross-country benchmarking.

Sustainability

Global healthcare drives around **5% of global greenhouse gas emissions**. The **medical technology sector accounts for 15–25% of that share**, equivalent to around **1% of global emissions**. If medtech were a country, its greenhouse gas footprint would be comparable to France's.[14]

The Greenhouse Gas Protocol categorises greenhouse gas emissions into three scopes: direct emissions (Scope 1), indirect energy emissions (Scope 2), and other indirect emissions (Scope 3). Within the medical technology sector, progress has been made in reducing Scope 1 and Scope 2 emissions, while Scope 3, occurring across a complex, global supply chain, remains the primary challenge.

Emissions directly under medtech companies' control represent only **5–10% of the total**. The remainder is distributed across the value chain: an estimated 45–55% in raw material extraction and processing, 15–20% in the use phase, 10–20% in end-of-life, and 5–10% in packaging (indicative ranges; they do not sum to 100%).[14]

Renewable energy, renewable heat and efficiency measures represent the most significant short-term decarbonisation levers, offering roughly 40% emission-reduction potential in the near term. A further approximately 50% abatement potential exists but remains difficult to unlock:

- 25–30% faces economic or regulatory barriers (for example, rules on reprocessing and waste) to full implementation.
- 15–20% has no regulatory barrier but relies on technology that is still immature and costly.
- 10% is both expensive and requires extensive regulatory change before implementation.

Employment

The European medical technology industry directly employs more than **950,000 people**[7], up from over 930,000 in the 2025 edition. **Germany** has the highest absolute number of medical technology employees, while employment per capita is highest in **Ireland** and **Switzerland**. For comparison, the European pharmaceutical industry employs around 955,000 people[8]: **medtech employment is now close to that of the pharmaceutical industry.**

These jobs account for around **0.37% of total employment in Europe**[7] and are highly productive: value added per employee is estimated at around €182,000.

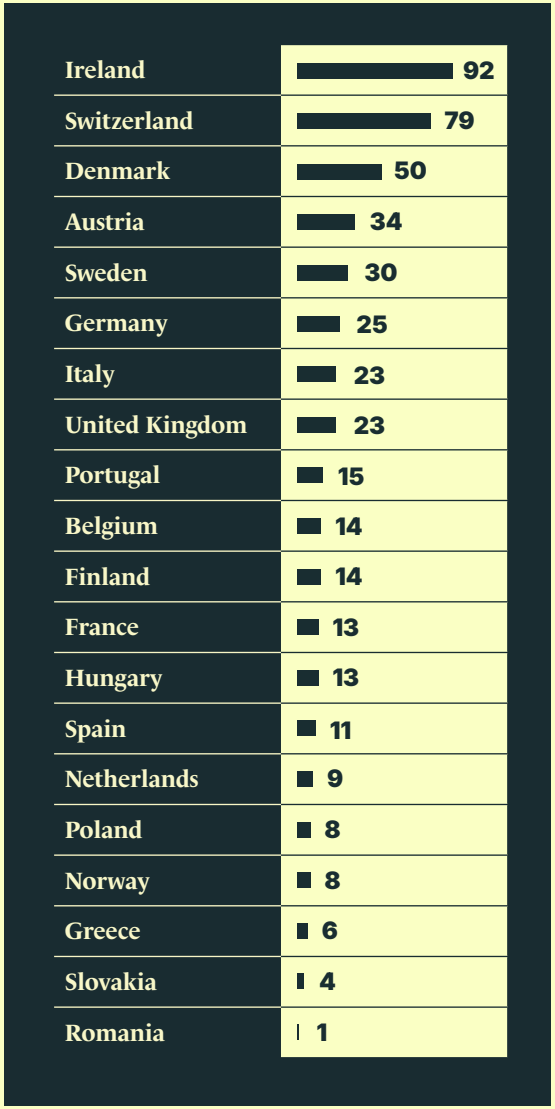
Record employment, even against a slipping global market share, is one clear sign that Europe's medtech workforce has room to grow further, if regulatory conditions allow it to compete on a level footing with faster-moving markets.

Graph 3 – Top 10 countries in Europe with highest direct employment in the medical technology industry Latest year available (ref. 5)

Country	Employment
Germany	212,100
United Kingdom	158,500
Italy	133,627
France	90,172
Switzerland	71,701
Spain	55,600
Ireland	50,000
Sweden	31,500
Austria	31,138
Denmark	30,000
Total estimation	950,000 +

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 36,000 medical technology companies in Europe, down from over 38,000 in the 2025 edition** — the first year-on-year decline recorded in this report.

Most European countries reported broadly stable or slightly higher company numbers; the net European figure is driven largely by developments in Germany, a market whose company count has fluctuated significantly in both directions in past editions. As with other data collected through national associations, year-on-year changes should be read with some caution, but the size of the shift in this edition is enough to warrant continued monitoring.

The highest number are based in **Germany**, followed by **Italy**, the **UK**, **Poland**, **Sweden** and **Switzerland**. **Small and medium-sized companies (SMEs) make up around 90% of the industry**, the majority employing fewer than 50 people.[7]

A dip worth watching

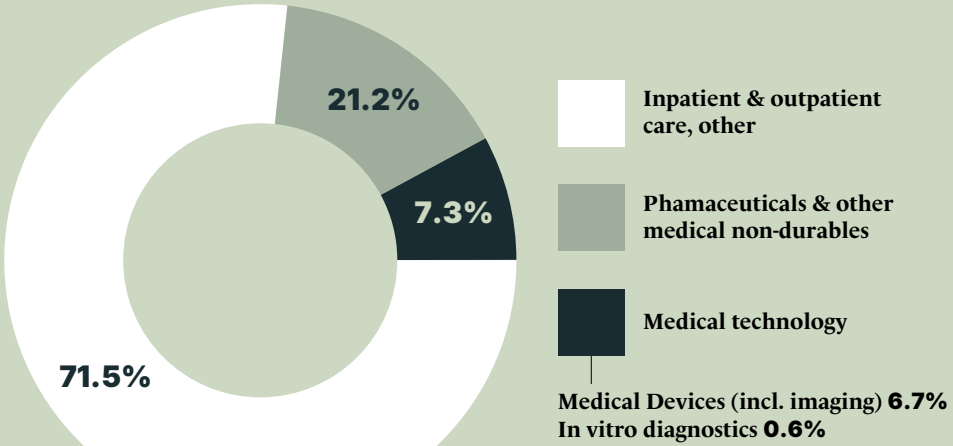
Small and medium-sized companies remain the most exposed to rising regulatory compliance costs and restrictive purchasing practices, and some are less able to absorb either than in the past. SMEs are likely to keep navigating a dynamic regulatory environment over the coming year — from the ongoing MDR/IVDR revision to the parallel reform of EU public procurement rules — alongside economic shocks such as tariffs. Resilience to both will be essential.

Expenditures

In Europe, an average of approximately **10% of GDP is spent on healthcare**. Of this, around **7.3% is attributed to medical technologies**, less than **1% of GDP** overall. Spending on medical technology varies significantly across European countries, from around 5% to 12% of total healthcare expenditure. Expenditure on medical technology per capita in Europe is around €325.*

Graph 5 – Breakdown of total healthcare expenditure in Europe, 2025

2025



*MedTech Europe calculation based on sources 7–12

MedTech Market in Europe

The European medical technology market is estimated at roughly **€173 billion** in 2025.[11],[12] The top five markets are **Germany, France, the UK, Italy and Spain**. Based on manufacturer prices, the European medical device market makes up **25.6% of the world market**, down from 26.4% the previous year, the **second largest after the US** (47.6%).[12]

The European medical device market has **grown by an average of 5.6% per year over the past decade**. Growth was hit hard by the Global Financial Crisis and COVID-19, falling to a historic low of 1% in 2009 before rebounding to 8.2% in 2010, and again around the pandemic, with 11.5% growth in 2022. In 2025, growth stood at just 1.8%.[12]

Graph 6 – European medical device market by country

Based upon manufacturer prices, 2025

Country	Market Share %
Germany	24.6
UK	12.9
France	12.4
Italy	9.4
Spain	7.0
Netherlands	6.8
Switzerland	4.0
Belgium	3.3
Poland	3.1
Austria	2.9
Others	13,7

Prior to the pandemic, the European IVD market grew steadily at 1–2% annually. COVID-19 triggered record growth of 29.1% in 2020 and 43.7% in 2021, followed by a market correction in 2022–2023 as pandemic-related testing demand declined. Growth returned to positive territory in 2024 and normalised further in 2025, reverting to sustainable levels. **Over the past decade, the European IVD market has grown by an average of 3.6% per year**.

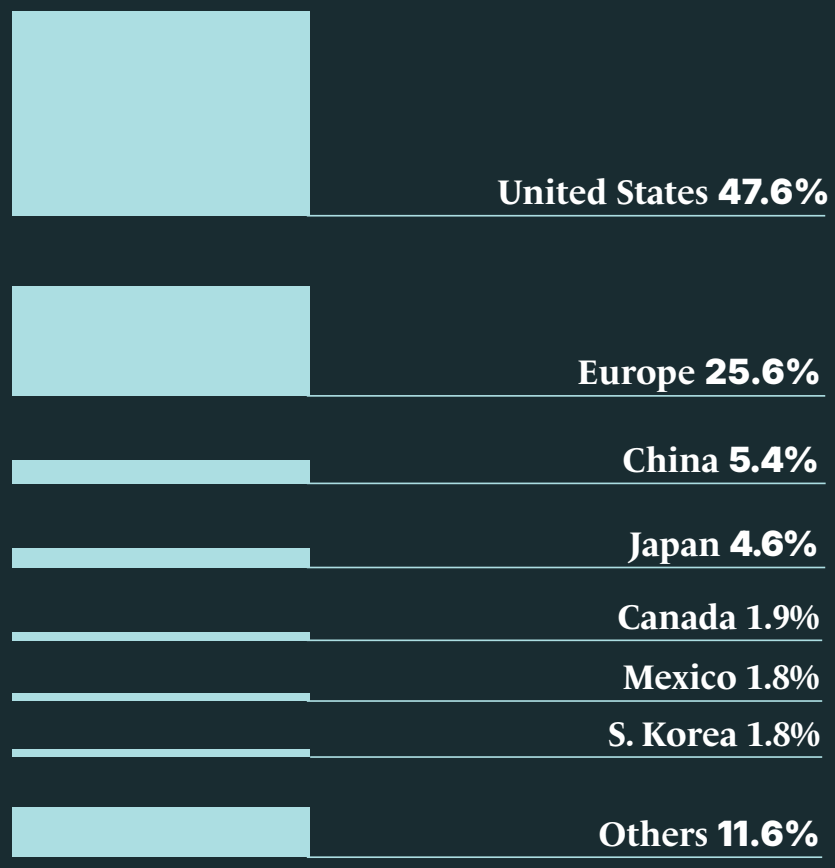
Graph 7 – European IVD market by country

Based upon manufacturer prices, 2023

Country	Market Share %
Germany	17.7
France	15.0
Italy	12.8
Spain	10.3
UK	9.7
Netherlands	4.7
Switzerland	4.2
Poland	2.9
Belgium	2.8
Austria	2.7
Others	17.1

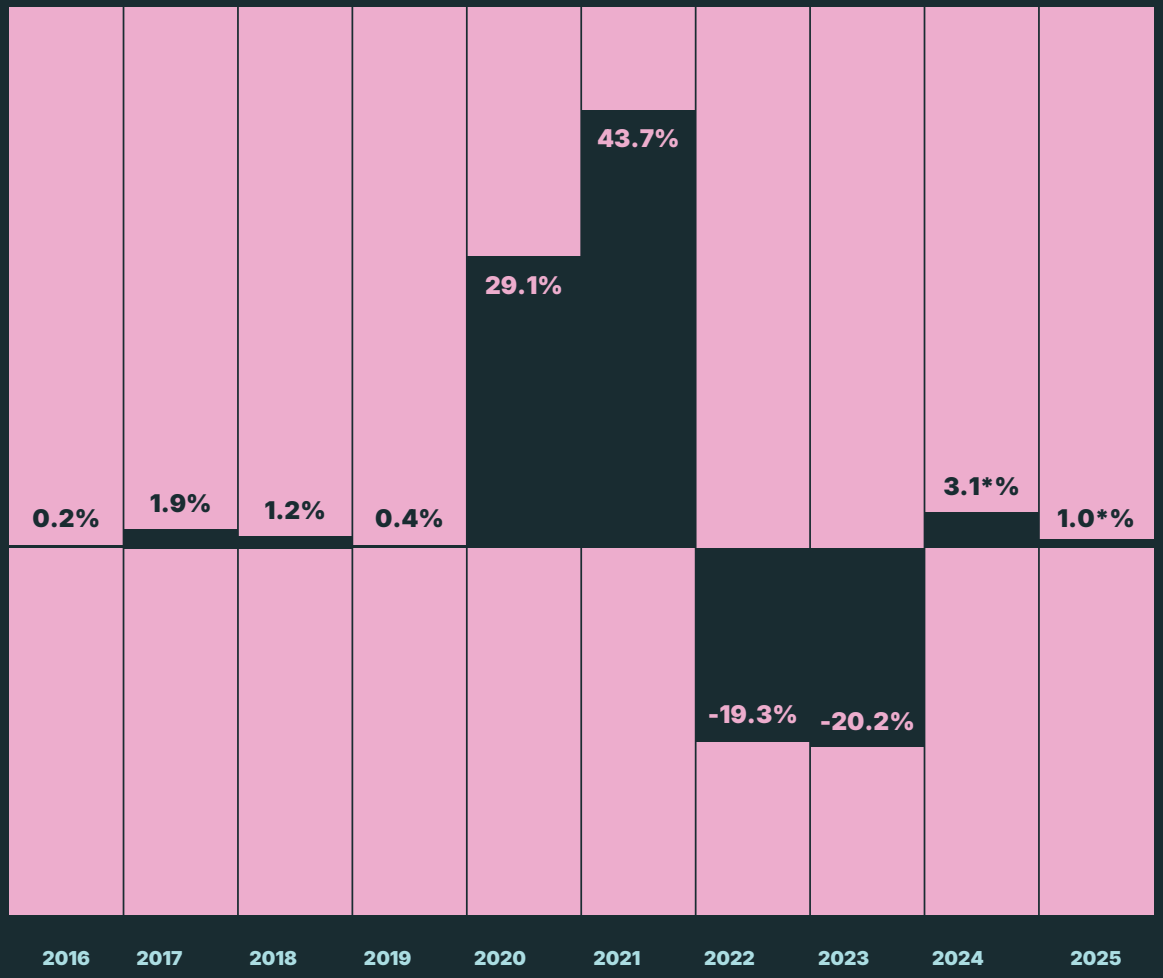
Graph 8 – Europe in the World medical device market

Based upon manufacturer prices, 2025



Graph 9 – European IVD market growth rates

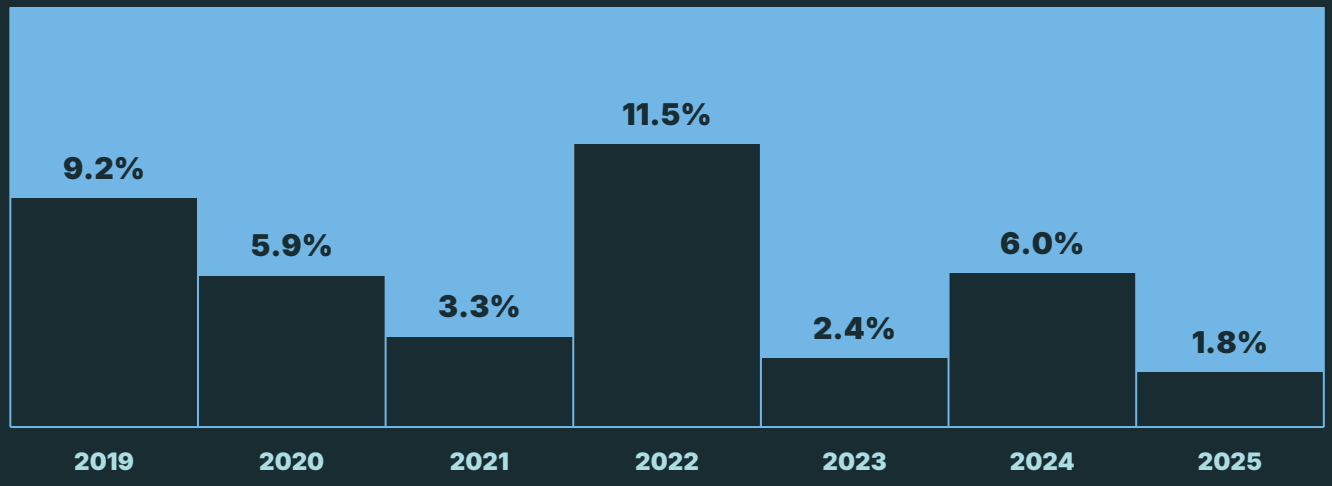
Based upon manufacturer prices, 2025



* Provisional numbers

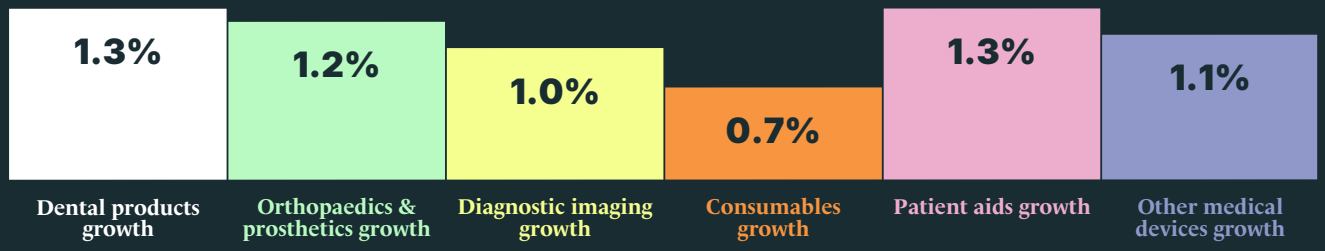
Graph 10 – European medical device market growth rates

Based upon manufacturer prices, 2019-2025



Graph 11 – European medical technology growth rates by sectors

Based upon manufacturer prices, 2025



Trade in Europe

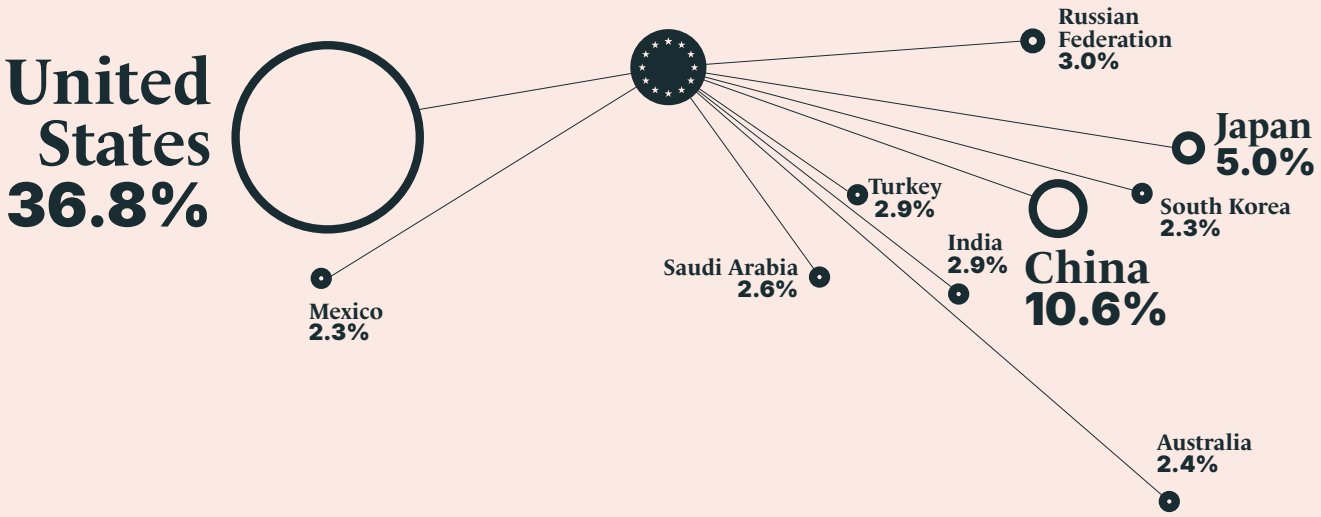
In 2025–2026, MedTech Europe substantially revised its Harmonised System (HS) trade code list to improve coverage of medical technology trade, expanding the nomenclature from 45 to more than 70 codes focused on final goods. Historical data have been restated on the same basis to support comparability over time.

Europe recorded a positive medical devices trade balance of €4 billion in 2025. This figure is not directly comparable to the €5 billion surplus reported in the 2025 edition, owing to the HS code methodology revision described above. Trend commentary should rely on the restated historical series rather than a direct year-on-year comparison of headline figures. Trade balance patterns broadly reflect the wider dynamics of the European medtech market, with contractions during periods of crisis followed by recovery and a return to more stable levels.

The main European medical device trade partners remain unchanged following the HS code revision: the **US, China, Japan and Mexico.**[13]

Graph 12 – Top European medical device export destinations

2025

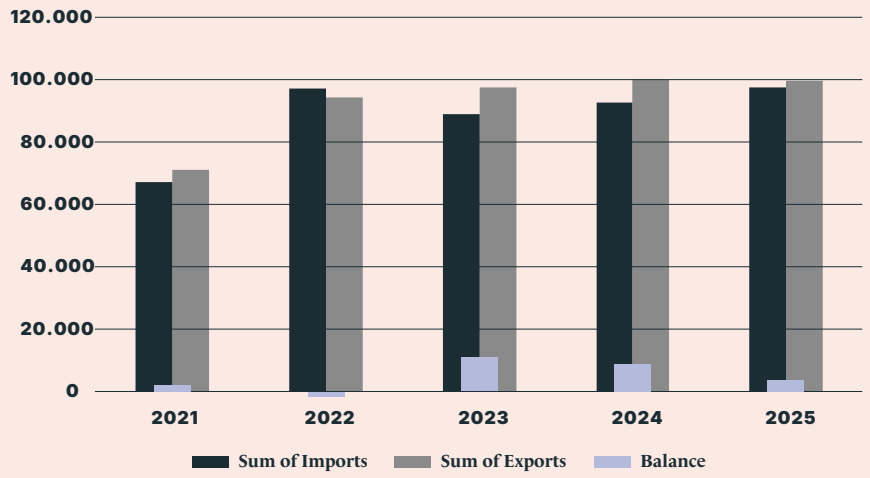


Graph 13 – Top suppliers to European medical device market (imports)

2025

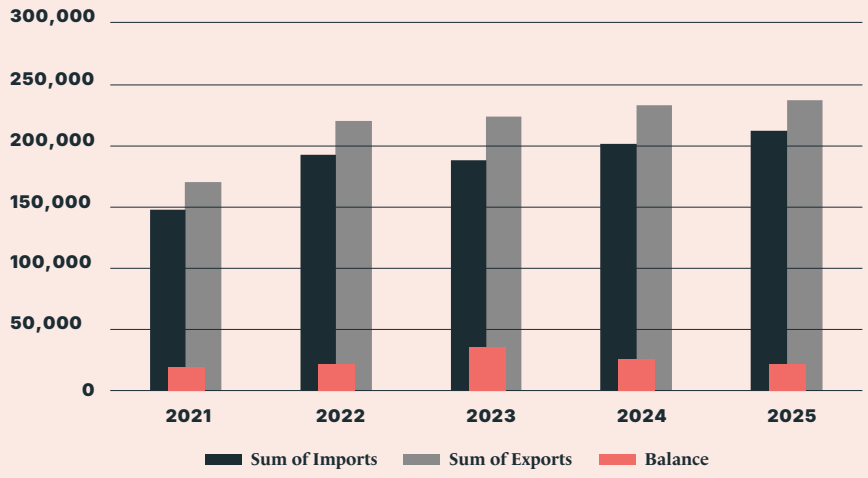
European medical technologies trade balance (excluding European intra-community trade)

2021 – 2025 million euros



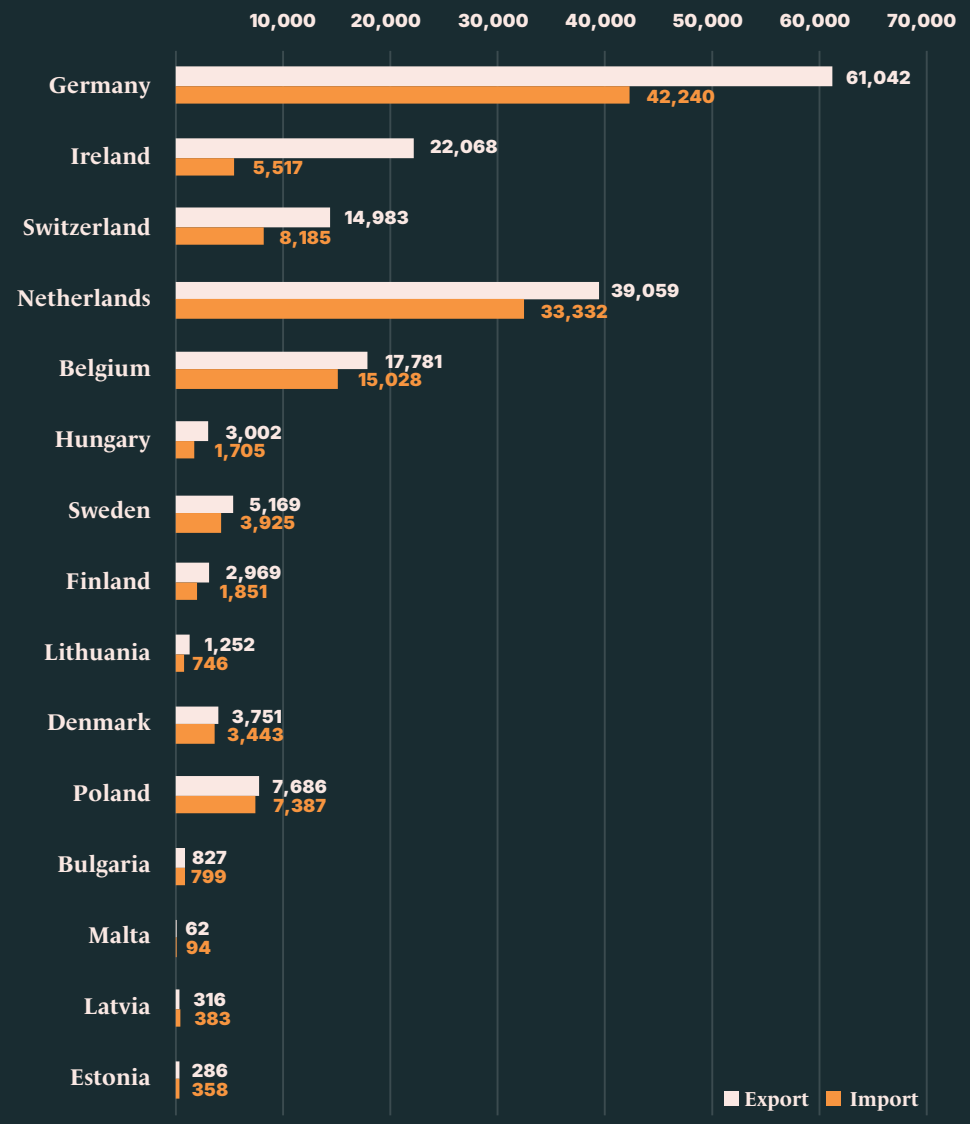
European medical technologies trade balance (including European intra-community trade)

2021 – 2025 million euros



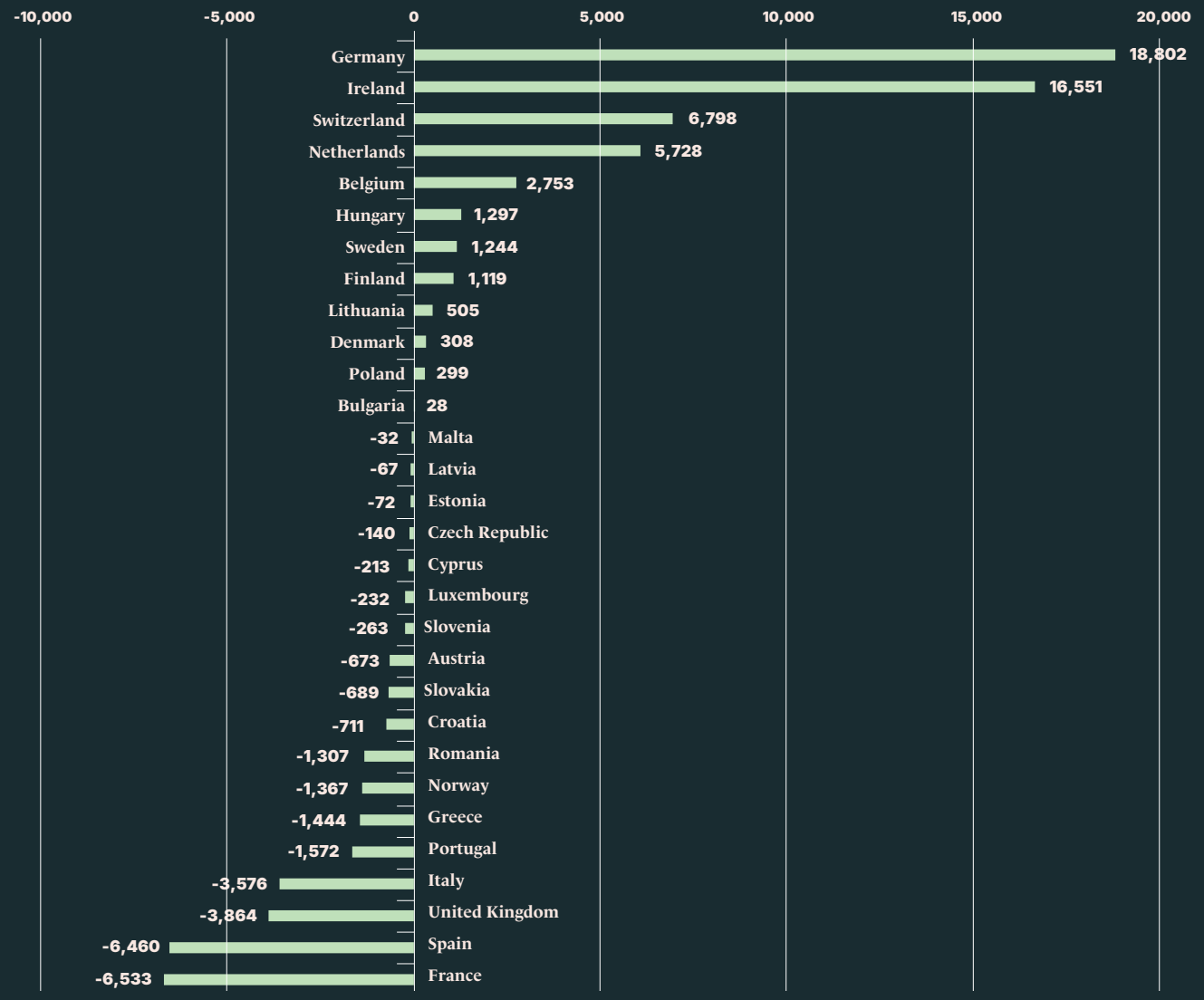
Graph 14 – TOP15 Export & imports of medical devices by country (including European intra-community trade, million euros)

2025



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

2025



About MedTech Europe

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

MedTech Europe's mission is to make innovative medical technology available to more people while helping healthcare systems move toward a sustainable path. We encourage policies that help the medical technology industry meet Europe's growing healthcare needs and expectations, and promote medical technology's value for Europe through economic research and data, communications, industry events and training.
MedTech Europe's Facts & Figures is an annually updated report compiled from multiple robust industry data sources. It is an essential reference for international stakeholders seeking an up-to-date view of industry innovation, employment, SME activity, expenditure, trade flows and market size in Europe.

Methodology & scope

- In this report, "Europe" refers to EU27, Norway, Switzerland and the United Kingdom, unless otherwise specified.
- The Innovation chapter follows the WIPO IPC-Technology concordance (revised August 2014). Patents are attributed by the applicant's country of residence. EPO countries refer to the 39 member states of the European Patent Organisation.
- The Employment and Companies chapters are based on MedTech Europe's annual National Associations Survey, finalised in May 2026. Figures refer to the latest year available. An enterprise is an SME if it employs fewer than 250 people and has annual turnover below €50 million (small and micro-enterprises: fewer than 50 people, turnover below €10 million).
- The Expenditure chapter is based on MedTech Europe calculations using data from EFPIA, Eurostat, Fitch Solutions and WHO.
- The MedTech Market in Europe chapter is based on manufacturers' sales (revenue), excluding wholesale/retail margins, transportation costs and certain taxes.
- The Trade chapter covers: orthopaedics & prosthetics, patient aids, dental products, diagnostic imaging, consumables, and other medical devices (including wheelchairs, ophthalmic instruments, hospital furniture, sterilisers, UV/infrared apparatus, blood pressure monitors, endoscopy apparatus, dialysis apparatus, transfusion apparatus, anaesthetic apparatus and instruments).

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