FACT SHEET

Medical Technology Clusters in Germany

ISSUE 2022/2023

Germany is Europe’s largest medical technology market and ranks third internationally. With more than 1,450 medical device manufacturers (>20 employees) and two thirds of revenues generated outside its domestic market, Germany's medical technology industry is thriving.

Throughout the world, products “Made in Germany” have achieved an excellent reputation for their leadership in quality, innovation and design. The foundation of this success is a well-established collaboration between private sector companies, hospitals, research institutions, and academia.

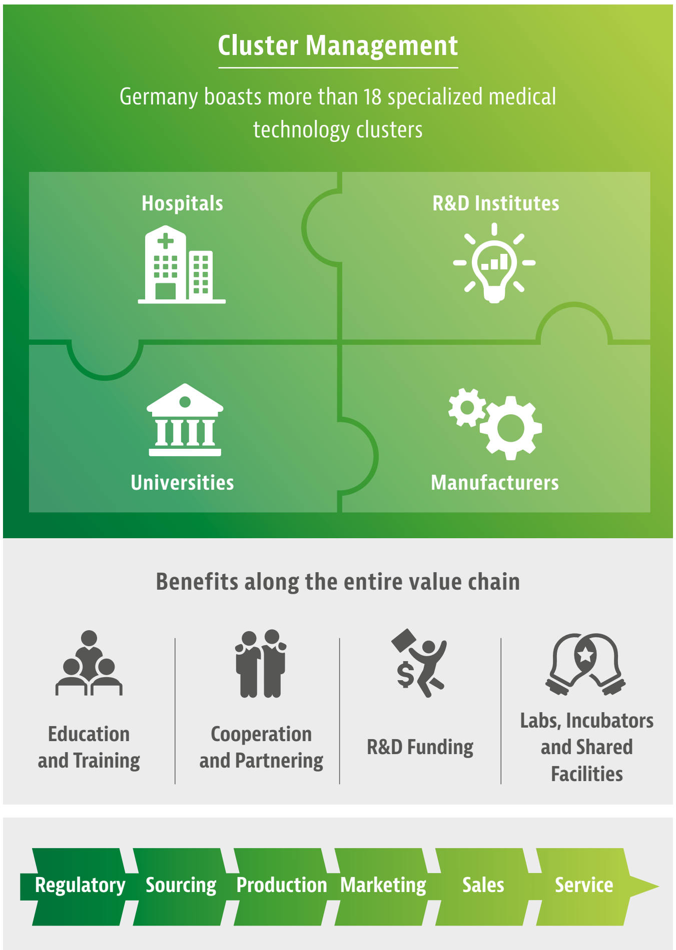
Germany’s unique MedTech clusters

Germany is home to more than 46 cluster networks active in medical technology. Their goal is to achieve continuous innovation in research and development as well as in manufacturing by connecting companies, hospitals, universities, and other research institutions. Dedicated cluster management teams help obtain funding for joint R&D projects, provide shared facilities and organize educational training programs for their members.

Finding partners made simple

Working closely with local cluster experts, Germany Trade and Invest (GTAI) can support international companies by identifying and contacting partners for research and development. Most of the 30+ university hospitals are key members of those cluster networks; making key clinical opinion leaders an approachable part of the innovation community. Matching partners and service providers can also be found to assist with product certification, reimbursement procedures and product development.

MedTech clusters: Benefits along the value chain

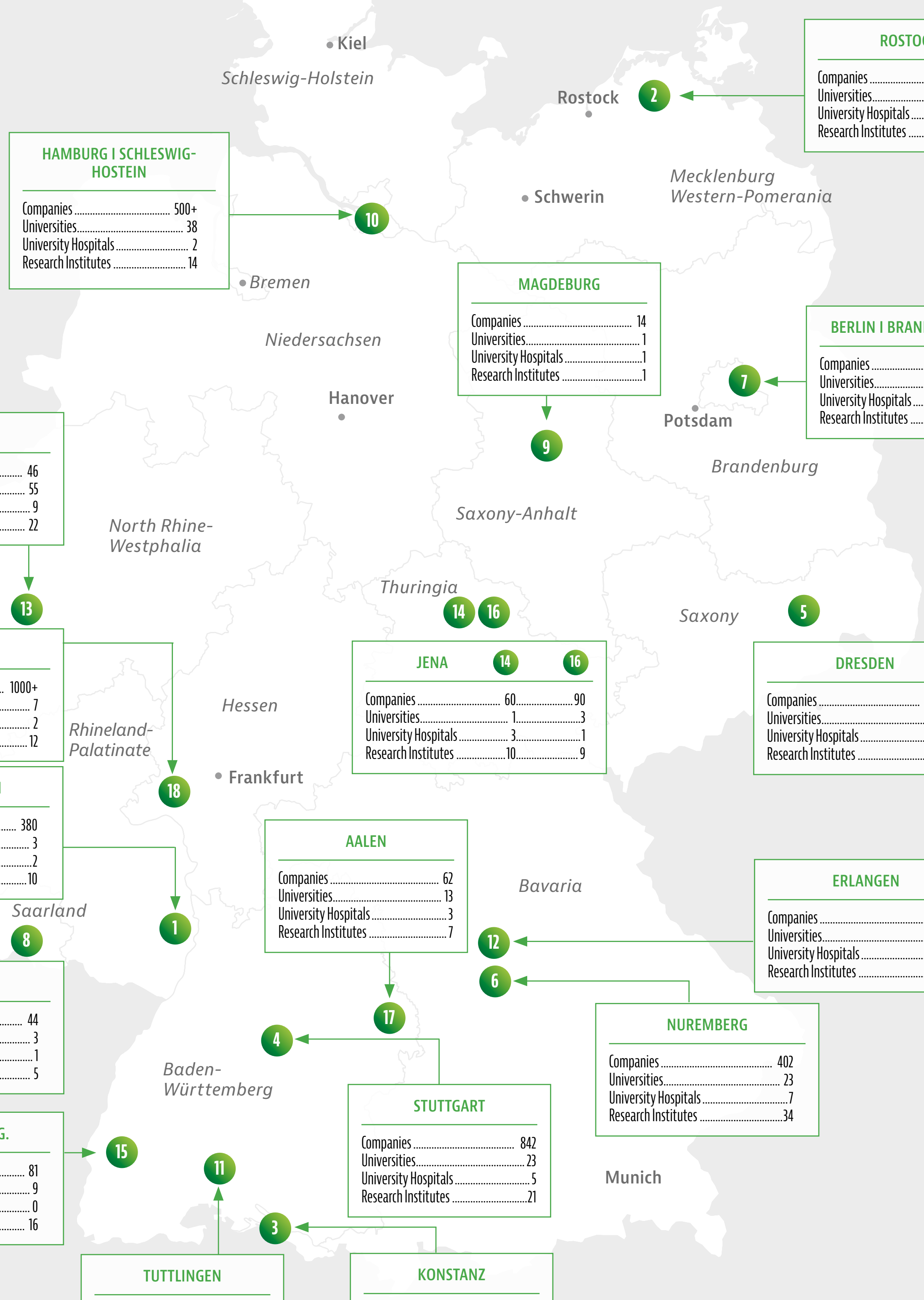


→ **GTAI assists international companies in setting up business operations – such as R&D centers, manufacturing facilities, and sales and service centers – in Germany. For further information and contact details please visit us online at:** *www.gtai.com/medtech*

Medical Technology Clusters in Germany

We provide a countrywide overview of selected clusters and networks on regional and state-wide level. The vast majority is recognized by the national “go-cluster” excellence program in accordance with the guidelines of the European Cluster Excellence Initiative (ECEI).

Interested companies are welcome to join one or more clusters regardless of geographic location. The map illustrates the location of the clusters. The numbers refer to the corresponding numbers in the table on the right.



ROSTOCK (2)

Companies	70
Universities	5
University Hospitals	0
Research Institutes	12

HAMBURG I SCHLESWIG-HOSTEIN (10)

Companies	500+
Universities	38
University Hospitals	2
Research Institutes	14

MAGDEBURG (9)

Companies	14
Universities	1
University Hospitals	1
Research Institutes	1

BERLIN I BRANDENBURG (7)

Companies	350
Universities	31
University Hospitals	2
Research Institutes	40

DÜSSELDORF (13)

Companies	46
Universities	55
University Hospitals	9
Research Institutes	22

WIESBADEN (18)

Companies	1000+
Universities	7
University Hospitals	2
Research Institutes	12

JENA

	14	16
Companies	60	90
Universities	1	3
University Hospitals	3	1
Research Institutes	10	9

DRESDEN (5)

Companies	200
Universities	2
University Hospitals	9
Research Institutes	14

LUDWIGSHAFEN (1)

Companies	380
Universities	3
University Hospitals	2
Research Institutes	10

AALEN (17)

Companies	62
Universities	13
University Hospitals	3
Research Institutes	7

ERLANGEN (12)

Companies	250
Universities	8
University Hospitals	2
Research Institutes	21

SAARBRÜCKEN (8)

Companies	44
Universities	3
University Hospitals	1
Research Institutes	5

NUREMBERG (6)

Companies	402
Universities	23
University Hospitals	7
Research Institutes	34

STUTTGART (4)

Companies	842
Universities	23
University Hospitals	5
Research Institutes	21

FREIBURG I. BRSG. (15)

Companies	81
Universities	9
University Hospitals	0
Research Institutes	16

TUTTLINGEN (11)

Companies	400
Universities	5
University Hospitals	0
Research Institutes	24

KONSTANZ (3)

Companies	107
Universities	10
University Hospitals	2
Research Institutes	10

Source: GTAI Cluster Survey 2022

Medical Technology Clusters in Germany – Selected Areas of Activity

This table helps to find the right partner in Germany: Find your area of interest to identify clusters that consider this field their focus of activity.

	Scope of membership	Implants	Minimally invasive technologies	Digital health	Medical imaging	Diagnostics	Surgical instruments	Cardiology	Robotics	Hygiene management	Hearing aids	Ophthal	Plasma medicine	Bone healing	Dental	Orthopedics	Endoprosthetics	Home care	Rehabilitation	Assistive technologies
1 5-HT Digital Hub Chemistry & Health	State-wide			●	●	●		●		●		●			●			●	●	●
2 BioCon Valley®	State-wide	●		●						●			●			●			●	
3 BioLAGO	State-wide			●		●			●									●		●
4 BIOPRO	State-wide	●	●	●		●	●	●	●						●	●	●			
5 biosaxony	State-wide	●		●		●			●				●			●	●	●	●	●
6 Forum MedTech Pharma e.V.	State-wide	●	●	●	●	●	●	●	●							●			●	
7 HealthCapital Berlin Brandenburg	State-wide	●	●	●	●	●		●						●		●	●			●
8 healthcare.saarland	State-wide		●	●		●	●	●		●					●	●			●	●
9 innoMed	State-wide	●	●	●	●	●	●		●									●	●	●
10 Life Science Nord	Regional	●		●	●	●				●				●			●			
11 MedicalMountains GmbH	Regional	●	●				●										●			
12 Medical Valley EMN	State-wide			●	●	●		●	●	●								●	●	●
13 Medizin.NRW	State-wide	●	●	●	●	●		●									●		●	●
14 medways	State-wide	●		●	●	●		●	●			●			●				●	
15 microTEC Südwest	State-wide	●	●	●		●			●		●			●				●	●	●
16 OptoNet e.V.	State-wide		●	●	●	●		●	●			●			●					●
17 Photonics BW	State-wide		●	●	●	●	●					●								
18 Technologieland Hessen	State-wide	●		●	●	●		●							●	●			●	

The Cluster Platform and go-cluster Excellence Program
The Federal Ministry for Economic Affairs and Energy launched its "go-cluster" excellence program integrating the country's strongest cluster management organizations. While clusters included in the go-cluster program are vanguards of innovation, the purpose of the program is to increase their international visibility and the implementation of innovative services. Accordingly, go-cluster offers specific services to its individual target groups: cluster managers, cluster players and representatives from government, science and business.

The European Cluster Excellence Initiative (ECEI)
The ECEI was launched by the EU Commission in 2009 as part of the European Union's efforts to foster growth and creation of world-class clusters across the EU. The European Secretariat for Cluster Analysis (ESCA) was subsequently established in order to offer practical advice to Europe's cluster management organizations. Today, ESCA is a network of cluster experts from more than 30 countries that consults cluster policy makers and promotes cluster management excellence through benchmarking and quality labelling of clusters and their management organizations.

Germany's MedTech Industry

Home to Europe's largest hospital sector, Germany also boasts Europe's most innovative medical technology sector – registering around twice as many patents as its nearest European competitor country.

The medical technology industry is one of the most innovative sectors in Germany. The country's globally renowned university hospitals play an important role in the development and introduction of new medical products and services – whether as R&D partners or in the implementation of clinical trials.

Industry structure

The German medtech industry is mainly comprised of small and medium-sized enterprises (SMEs). Around 93 percent of all medtech companies in Germany are SMEs. They account for two thirds employment in the medtech sector (235,000 total). There are also some 13,000 micro enterprises or so with less than 10 employees.

Innovation driver MedTech

With around 1,400 patent applications, innovators from Germany led the European ranking of medtech patent applications at the European Patent Office (EPO) in 2021. This is equivalent to a more than twofold lead over the second most innovative country in the EU. Overall, medtech is the second most innovative field of all industries in the economy, with 15,321 patent applications at the EPO.

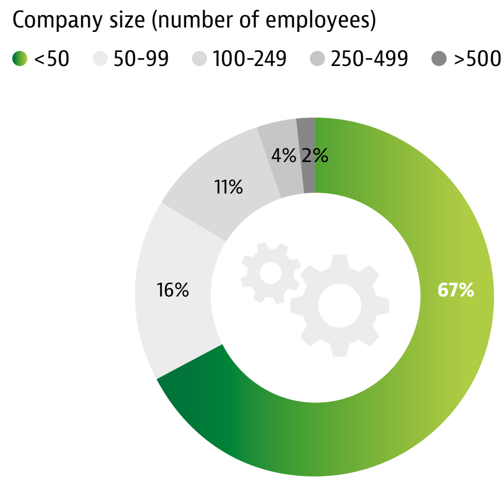
As one third of the German medtech industry's turnover is generated by products less than three years old, the share of innovative devices is significant. According to a BVMed market survey of 2020, cardiology, diagnostics, oncology, neurology, and surgery are the most innovative areas. To help turn inventions into innovations, a plethora of partnering opportunities with cluster members in industry, academia, research institutes, and clinical communities is possible.

Europe's largest hospital sector

With almost 1,900 hospitals, and a total capacity of around 500,000 beds, Germany has the largest hospital sector in Europe. With spending already in the EUR 100 billion region, close to 17 million patients received treatment in 2020, with an average hospitalization period of seven days. The majority of the largest hospitals are university hospitals, of which there are a total of 36 across the country.

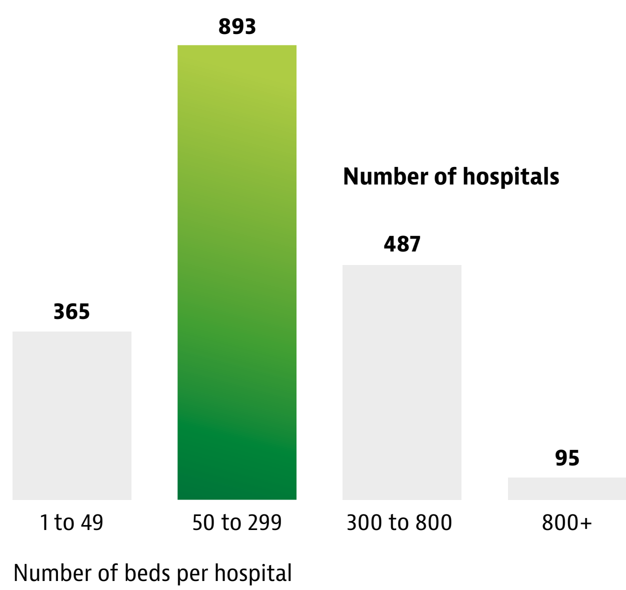
Berlin Charité is the largest university hospital with some 3,000 beds, followed by the university hospital of Mainz with about 1,700 beds and the university hospital of Tübingen with around 1,600 beds. Often a backbone member of medtech cluster networks, hospitals play an especially important role in implementing medtech innovation as partners for R&D and clinical trials. While many German hospitals have tended to be and often remain relatively small facilities in rural areas, there is a trend towards the expansion of midsize and large hospitals in metropolitan areas.

Most MedTech companies in Germany are SMEs
Number of companies according to employee size



Source: SPECTARIS 2022

Germany has a high number of hospitals
Number of hospitals by size



Source: VDEK 2020

→ **For more data concerning Germany's MedTech market please visit our website:** ***www.gtai.com/medtech***

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Germany Trade & Invest (GTAI) is the foreign trade and inward investment agency of the Federal Republic of Germany. We advise and support foreign companies planning to expand into the German market and assist German companies seeking to enter global markets.

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- Business and tax law information
- Funding and financing information

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