

# Medical Technology Clusters in Germany

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**Germany is Europe's largest medical technology market and ranks third internationally. With more than 1,443 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.

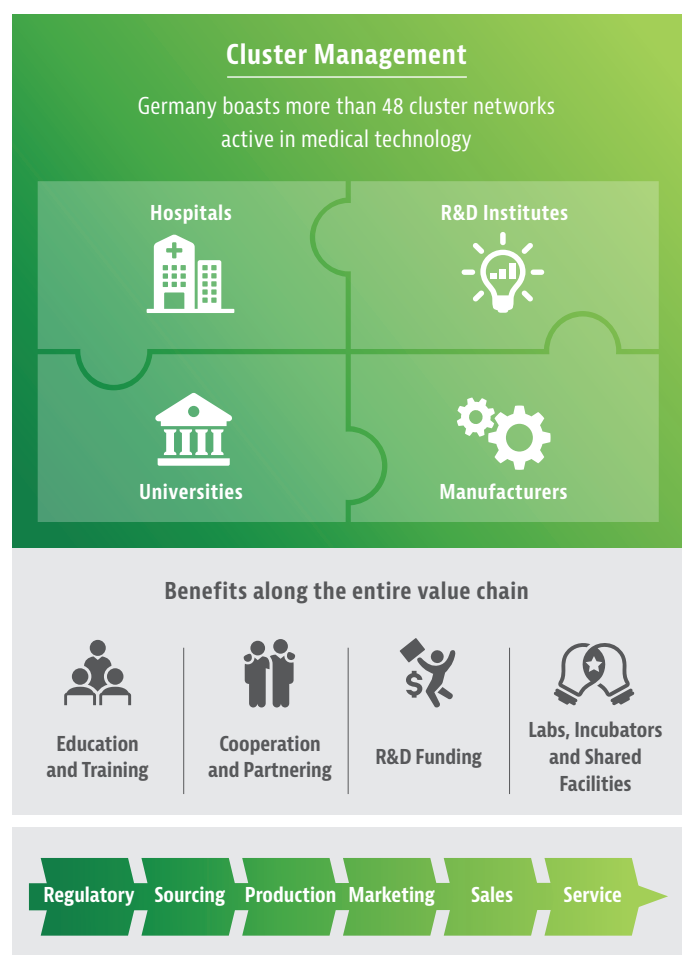
### Germany's unique MedTech clusters

Germany is home to more than 48 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 36+ 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



→ Germany Trade & Invest 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.de/medtech](http://www.gtai.de/medtech)

# Innovations and 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 (250,000 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 2023. This is equivalent to an almost twofold 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 15,985 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 2023, diagnostics, cardiology, neurology, oncology, 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 1,894 hospitals, and a total capacity of around 480,000 beds, Germany has the largest hospital sector in Europe. With spending already at EUR 102 billion, close to 17 million patients received treatment in 2022, 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 hospitals of Hamburg, Freiburg and Mainz with about 1,700 beds each. 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.

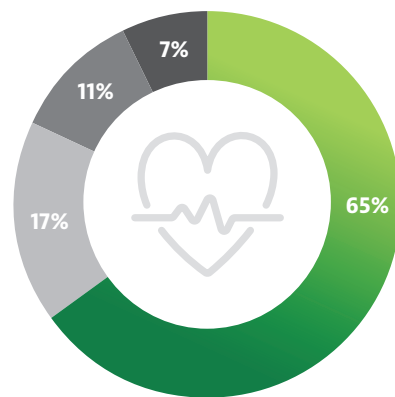
While many German hospitals have tended to be and often remain relatively small facilities in rural areas, there is a trend towards the expansion of midsize and large hospitals in metropolitan areas.

### Most companies in Germany are SMEs

Number of companies according to employee size

Company size (number of employees)

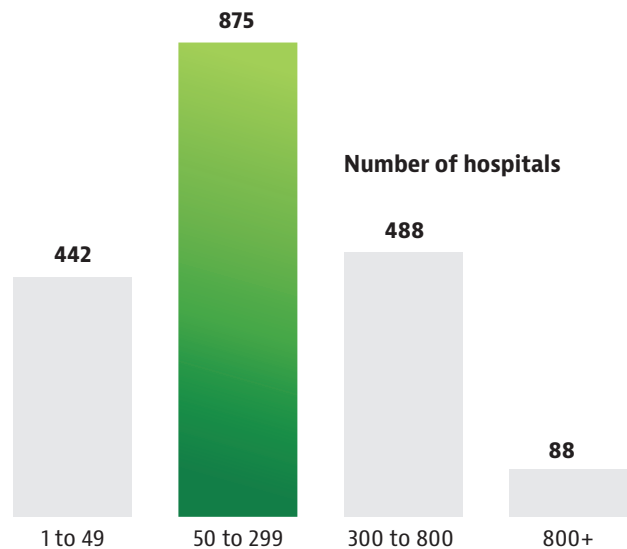
● <50 ● 50-99 ● 100-249 ● >250



Source: SPECTARIS 2023

### Germany has a high number of hospitals

Number of hospitals by size



Number of beds per hospital

Source: Statista 2024

→ For more data concerning Germany's medtech market please visit our website: [www.gtai.de/medtech](http://www.gtai.de/medtech)

# Medical Technology Clusters in Germany

We provide a countrywide overview of selected clusters and networks. 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.



Source: GTAI Cluster Survey 2024

# Medical Technology Clusters in Germany – Selected Areas of Activity

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

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

**The Cluster Platform and go-cluster Excellence Program**  
The Federal Ministry for Economic Affairs and Climate Action 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. Success stories are published regularly, highlighting the diversity of projects among cluster networks: from new approaches in securing skilled labour to new international collaboration projects and innovative products and services. International companies are welcome to request details when seeking partnering opportunities for innovation in medtech.

**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. Collaboration between clusters across borders, within the EU and beyond, is fostered by the European Cluster Collaboration Platform (ECCP). Transnational consortiums of clusters can be supported, the MAGIA projects for example (MedTech Alliance for Global Internationalisation). These saw clusters Life Science Nord (Germany), BioPMed (Italy), Lyonbiopole (France) and BioWiin (Belgium) help their SMEs expanding business relations to China, the US and Japan.

# Our Support for Your Business in Germany

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## Contact

### Gabriel Flemming

Chemicals & Healthcare Team:  
Germany Trade & Invest  
gabriel.flemming@gtai.de



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T +49 30 200 099 0, [invest@gtai.de](mailto:invest@gtai.de)

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Dr. Robert Hermann, CEO

**Editor:** William MacDougall, GTAI

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