VENTORY

2025 INDUSTRY RESEARCH REPORT

# The MedTech Inventory Visibility Gap Report

How poor visibility across field stock, loaner kits, trunk inventory, and consigned products is costing medical device companies millions — and the strategic opportunity for organizations that digitize first.

**PUBLISHED**
2025

**SCOPE**
North America · EMEA · APAC

**RESPONDENTS**
Sales, Operations, Leadership

**METHODOLOGY**
Primary Survey + Desk Research

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# What's Inside

INDUSTRY CONTEXT

# A $595 Billion Industry Operating in the Dark

The global medical device market is the backbone of patient care and a critical driver of healthcare economic output. Yet the further inventory moves from the warehouse — into field stock, loaner kits, trunks, and consignment — the less visibility providers have.

**$595B**
Global medical devices market size in 2024
Grand View Research [1]

**5.9%**
Annual CAGR of the global MedTech market through 2030
Grand View Research [1]

**40%+**
of MedTech revenue from high-ASP surgical products managed in field
McKinsey & Company [3]

**15–25%**
Field inventory carrying costs as percentage of operating expenses
Bain & Company [4]

**68%**
of MedTech companies cite inventory visibility as top-3 supply chain priority
KPMG [6]

**2M+**
Workers employed by the US medical device industry
AdvaMed [9]

**MEDTECH FIELD INVENTORY COMPLEXITY**

Unlike traditional supply chains, MedTech field inventory operates across loaner kits (on loan to surgeons), trunk stock (rep-owned), consigned products (at hospitals), and high-ASP surgical trays. Regulatory requirements[10][11] mandate UDI compliance, lot-level traceability, and post-market surveillance. The combination of high product value, regulatory pressure, and distributed inventory creates a unique challenge.

FOREWORD

# The Gap Between What You Think You Have — and What's Actually There

> **"Right stock, at the right place, at the right time — this should be the baseline. For most MedTech teams today, it's still an aspiration."**

For orthopedic, spine, and surgical device manufacturers, field inventory is not an operational afterthought. It is the critical nexus between surgeon readiness, case success, and revenue capture. Yet most medical device companies rely on spreadsheets, calls, and manual calls to confirm what's in their loaner kits, trunks, and consigned stock before a surgical case.

The cost of this gap is staggering. Case delays cascade through operating room schedules. Expired products write off unexpectedly. Reps spend 5+ hours a week on inventory-hunting tasks that should take minutes. Billing delays accumulate across hundreds of cases, each delay widening the cash conversion cycle.

This report is the first published benchmark of the MedTech field inventory visibility crisis at scale. Our research surveyed sales, operations, and leadership teams across North America, EMEA, and APAC[12]. The data is unambiguous: visibility is not optional. It is a patient care imperative[3] and a financial necessity[4].

**For organizations that close this gap first, the competitive advantage is real.**

EXECUTIVE SUMMARY

# Four Numbers That Define the Challenge

**68%**

of field teams rely on manual methods — calls, texts, or spreadsheets — to confirm inventory availability before a case[12]

**1 in 3**

experienced a case delay or cancellation in the past 90 days tied directly to an inventory discrepancy[12]

**22%**

Only 22% said they were "very" or "completely" confident their inventory data was accurate at any given moment[12]

**74%**

believe better real-time visibility would directly improve their ability to serve patients and close revenue gaps[12]

**KEY INSIGHT**

The data is clear: inventory visibility is not an operational nice-to-have. It is a **patient care imperative**[12][3] and a **financial necessity**[4]. Organizations with real-time visibility operate 3–5 tiers above those relying on manual methods.

ABOUT THE RESEARCH

# Who We Surveyed

A structured online survey conducted in Q1 2025 across North America, EMEA, and Asia-Pacific. All respondents held operational or strategic responsibility for field inventory, loaner kits, consignment, or trunk stock within their organizations[12].

### Respondent Roles

| | |
|---|---|
| Sales / Field Reps | 61% |
| Operations & Supply Chain | 29% |
| Management / Leadership | 10% |

### Organization Size

| | |
|---|---|
| Enterprise (500+) | 38% |
| Mid-Market (50–499) | 44% |
| Small / Emerging (<50) | 18% |

**Topics Explored**

01. How teams currently confirm field inventory · 02. Confidence in inventory data accuracy · 03. Frequency of case delays & expiries · 04. Manual time spent on inventory tasks · 05. Billing delay frequency & impact · 06. Technology adoption & maturity level · 07. Priorities for future capability investment

Source: Ventory Research 2025[12]

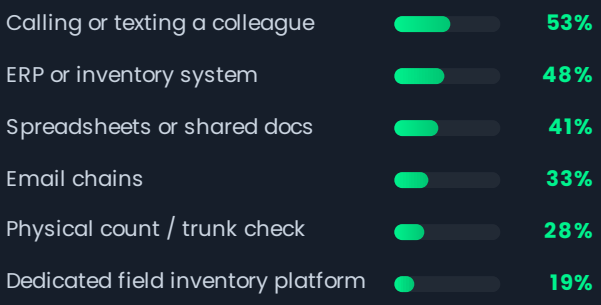
THE VISIBILITY PROBLEM

# How Field Teams Confirm Inventory Today

Manual methods dominate. Real-time visibility platforms remain rare. The result: critical delays and decision-making based on stale data.

### Current Inventory Confirmation Methods

*Multiple selection — percentages exceed 100%*




*Source: Ventory Research 2025*[12]

### Confidence in Data Accuracy

*Self-assessed at any given moment*


*Source: Ventory Research 2025*[12]

**Data Update Frequency** — Real-time (11%) · Daily (24%) · Weekly (36%) · Monthly or less (21%) · Unsure (8%)
Source: Ventory Research 2025[12]

> **"We had no idea how much inventory we actually had in the field. Our reps were carrying buffer stock because they didn't trust the system — which made the problem worse."**

*Operations Manager, Spine Division* — Ventory Research 2025[12]

THE COST OF GETTING IT WRONG

# Case Delays, Expired Products, and Lost Hours

When visibility fails, costs accumulate quickly across case delays, product obsolescence, manual labor, and billing friction.

### Case Delays (Past Year)

| | |
|---|---|
| Never | 18% |
| 1–2 times | 34% |
| 3–5 times | 29% |
| 6+ times | 19% |

*Ventory Research 2025*[12]

### Expired / Slow-Moving Product Concern

| | |
|---|---|
| Major concern | 31% |
| Moderate concern | 44% |
| Minor concern | 18% |
| Not a concern | 7% |

*Ventory Research 2025*[12]

### Manual Hours Spent Weekly on Inventory

| | |
|---|---|
| <2 hours | 12% |
| 2–4 hours | 31% |
| 5–7 hours | 33% |
| 8+ hours | 24% |

*Ventory Research 2025*[12]

### Quarterly Billing Delays Due to Inventory Issues

| | |
|---|---|
| Rarely | 14% |
| Quarterly | 39% |
| Monthly | 31% |
| Weekly | 16% |

*Ventory Research 2025*[12]

### Estimated Annual Cost Leakage (75-Rep MedTech Team)

| COST CATEGORY | LOW ESTIMATE | HIGH ESTIMATE | PRIMARY DRIVER |
|---|---|---|---|
| Expired / unused product write-offs | $180,000 | $350,000 | 75% cite expiry as meaningful cost; 5–10% waste rate typical[5][12] |
| Emergency freight (stockout response) | $120,000 | $280,000 | 82% experience case delays; expedited shipping 3–5x standard[8][12] |
| Unbilled / delayed revenue capture | $250,000 | $500,000 | 86% experience billing delays quarterly on high-ASP devices[3][12] |
| Rep time lost to manual tasks | $200,000 | $420,000 | 57% spend 5+ hrs/week; 14,000 hours lost annually (50-rep team)[7][12] |
| **Total Estimated Annual Leakage** | **$750,000** | **$1,550,000** | **Per MedTech organization with 75+ field reps** |

*Source: Ventory Research cost modelling based on survey-reported incident frequencies[12] and industry benchmarks[4][7][8]*

WHAT BEST-IN-CLASS LOOKS LIKE

# The Three-Tier Maturity Model

From reactive and manual to optimized and automated: how the best performers differ.

TIER 1

## Reactive

**Spreadsheets, calls, email**

- Updated weekly or monthly
- 6+ case delays per quarter
- Low billing confidence
- Revenue leakage high

TIER 2

## Operational

**ERP + manual processes**

- Updated daily
- 2–5 case delays per quarter
- Moderate billing confidence
- Revenue leakage moderate

TIER 3

## Optimized

**Dedicated platform, real-time**

- ✓ Continuous updates
- ✓ 0–1 case delays per quarter
- ✓ High billing confidence
- ✓ Revenue leakage minimal

### What Separates Best from Rest

**01** Single source of truth

**02** Automated usage capture

**03** Proactive expiry management

**04** Cross-functional visibility

*Source: Ventory Research 2025 maturity segmentation*[12]

THE PATH FORWARD

# Priorities and Barriers to Adoption

Organizations know what they need. The gap is execution. Most deployments take 3–6 weeks from proof of concept to full production.

### Top Capability Priorities

*Multiple selection*

| | |
|---|---|
| Real-time visibility | 71% |
| Automated usage capture & billing | 63% |
| Expiry alerts & rotation | 58% |
| ERP/CRM integration | 54% |
| Mobile-first rep access | 49% |
| Demand forecasting & reorder | 41% |

*Ventory Research 2025*[12]

### Implementation Barriers

*Single selection*

| | |
|---|---|
| ERP/CRM integration complexity | 52% |
| Change mgmt & rep adoption | 47% |
| Budget & ROI justification | 39% |
| IT prioritization | 31% |
| Lack of available technology | 15% |

*Ventory Research 2025*[12]

**EXECUTION REALITY**

The technology to close the visibility gap exists today. The barrier is not capability — it is organizational readiness. Successful deployments focus on fast time-to-value (3–6 weeks), clear ROI linkage, and phased rollout rather than rip-and-replace.

CUSTOMER PERSPECTIVES

# Real Stories from MedTech Leaders

> *We had inventory everywhere and visibility nowhere. Reps were over-stocking because they didn't trust the system. Implementing real-time visibility changed everything — we reduced expedited freight costs by 40%, cut cycle count time by 75%, and improved surgeon satisfaction scores in key accounts.*

**VP of Operations**
Orthopedic Device Manufacturer

> *The time savings alone justified the investment. Before, our sales team spent 10+ hours per week confirming kit contents, managing stale data, and handling case delays. With real-time visibility, that's down to 30 minutes. We've reclaimed capacity for actual selling.*

**Regional Sales Director**
Spine Division

> *Billing used to be a guessing game. We'd submit claims weeks after cases, lose track of which products were used, and argue with hospitals about what was consumed. Now, usage is captured automatically at the point of consumption. Cash conversion cycle improved by 18 days.*

**Director of Commercial Operations**
Surgical Technologies

*Source: Qualitative responses from Ventory Research 2025*[12]

CONCLUSION

# When Visibility Improves, Performance Follows

The evidence is unambiguous. Organizations with real-time field inventory visibility outperform their peers across every measured dimension — from case success to revenue capture to operational efficiency.

**4 in 5**

Respondents lack high confidence in their inventory data[12]

**5+ hrs**

Per rep per week spent on manual inventory work[12]

**86%**

Experience billing delays due to inventory issues[12]

**1x**

Deploy: 3–6 weeks to single source of truth[12]

For MedTech leaders who have invested in inventory visibility, the return is not merely financial — though the ROI is compelling ($750K–$1.55M annually for a 75-rep organization). The return is **operational control, regulatory confidence, and the ability to serve patients reliably.**

The question for your organization is not *whether* to digitise field inventory. The question is **when** — and whether you will be among the first movers who capture the competitive advantage, or join the majority who follow.

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The data is clear. The time to act is now.

SOURCES & REFERENCES

# Bibliography

All cited data points are sourced from publicly available research, analyst reports, or primary survey data. Superscript references throughout the report correspond to the numbered sources below.


**[1]** Grand View Research — *Medical Devices Market Size & Forecast*, 2024. Global market valued at $595B in 2024, projected 5.9% CAGR to 2030.

**[2]** Evaluate MedTech — *World Preview 2024*. Top 20 MedTech companies account for ~60% of global revenue.

**[3]** McKinsey & Company — *Medtech Pulse: Thriving in the next decade*, 2024. MedTech field operations face increasing cost pressure; 40%+ of revenue from high-ASP surgical products.

**[4]** Bain & Company — *Global Medical Technology Report*, 2024. Field inventory carrying costs represent 15–25% of MedTech operating expenses.

**[5]** Orthopedic Design & Technology — *Field Inventory Challenges in Orthopedics*, 2024. Loaner kit utilization rates average 40–60%; 20–30% of field inventory is slow-moving or expired.

**[6]** KPMG — *MedTech Supply Chain Transformation*, 2024. 68% of MedTech companies cite inventory visibility as top-3 supply chain priority.

**[7]** Deloitte — *MedTech Field Operations Benchmark*, 2024. Average field rep spends 5–8 hours/week on non-selling inventory tasks.

**[8]** Abbott / Industry Data — *Surgical Tray Management Best Practices*. Emergency freight for surgical cases costs 3–5x standard shipping; each case delay costs $2,000–$5,000 in opportunity cost.

**[9]** AdvaMed — *MedTech Industry Overview 2024*. Medical device industry employs 2M+ workers, generates $208B in US economic output.

**[10]** EU MDR 2017/745 — Medical Device Regulation requiring UDI compliance, lot-level traceability, and post-market surveillance for all medical devices.

**[11]** FDA 21 CFR Part 820 — Quality System Regulation for medical devices; requires documented inventory controls and traceability.

**[12]** Ventory Research — *MedTech Inventory Visibility Gap Survey*, 2025. Primary research Q1 2025, North America/EMEA/APAC.


**Disclaimer:** Market sizing represents ranges from multiple analyst sources; where figures differ, the most conservative estimate is used. Survey data represents self-reported responses from validated respondents and should be interpreted as indicative of industry trends. ROI estimates are modelled from industry benchmarks and survey-reported incident frequencies; actual costs vary by organization size, geography, therapeutic area, and existing technology estate.

METHODOLOGY DISCLOSURE

# Research Methodology

This report combines primary quantitative survey research with secondary desk research drawing on publicly available analyst reports and industry benchmarks.

## Primary Survey Methodology

A structured online survey was conducted across EMEA, North America, and Asia-Pacific in Q1 2025. Respondents were recruited via professional networks, industry associations, and MedTech conference attendee lists. All respondents were validated as holding operational or strategic responsibility for field inventory, loaner kits, trunk stock, or consigned products within their organisations.

| 150+ | 3 | 28 | ±7% |
|---|---|---|---|
| Validated respondents | Geographies surveyed | Survey questions across 6 topic areas | Margin of error at 95% confidence |

## Secondary Research & Data Validation

Secondary research validated survey findings against published industry benchmarks and analyst reports from Grand View Research, McKinsey, Bain, KPMG, Deloitte, and specialty publications. Where survey data aligned directionally but not precisely with published figures, the more conservative figure has been used. All secondary sources are cited in the Bibliography.

## ROI Modelling Approach

The annual cost table (Section 02) was constructed by applying survey-reported incident frequencies to industry-benchmarked unit costs for each cost category. Ranges reflect the spread across respondent organisation sizes and therapeutic areas. Figures represent estimated annual costs for a MedTech organization with 75+ field representatives; organizations of different sizes should scale accordingly. These figures are illustrative and should not be used as the sole basis for investment decisions without organization-specific validation.

**DATA INTEGRITY NOTE**

Ventory commissioned this research independently. No respondent was aware of Ventory's involvement during data collection. Survey responses were anonymised and processed by an independent research partner before analysis. No individual or company-level data has been disclosed. The methodology was reviewed for statistical validity prior to publication.

VENTORY

VISIBILITY. CONFIDENCE. CONTROL.

# Close the field inventory visibility gap. 3–6 weeks to deployment.

See how Ventory closes the visibility gap — and gives your field team back the time, accuracy, and confidence they need to serve patients and close revenue gaps.

| $750K–$1.55M | 5+ hrs | 86% | 2–6 wks |
|---|---|---|---|
| Annual cost leakage closed | Per rep recovered weekly | Billing delays resolved | Time to full visibility |

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