

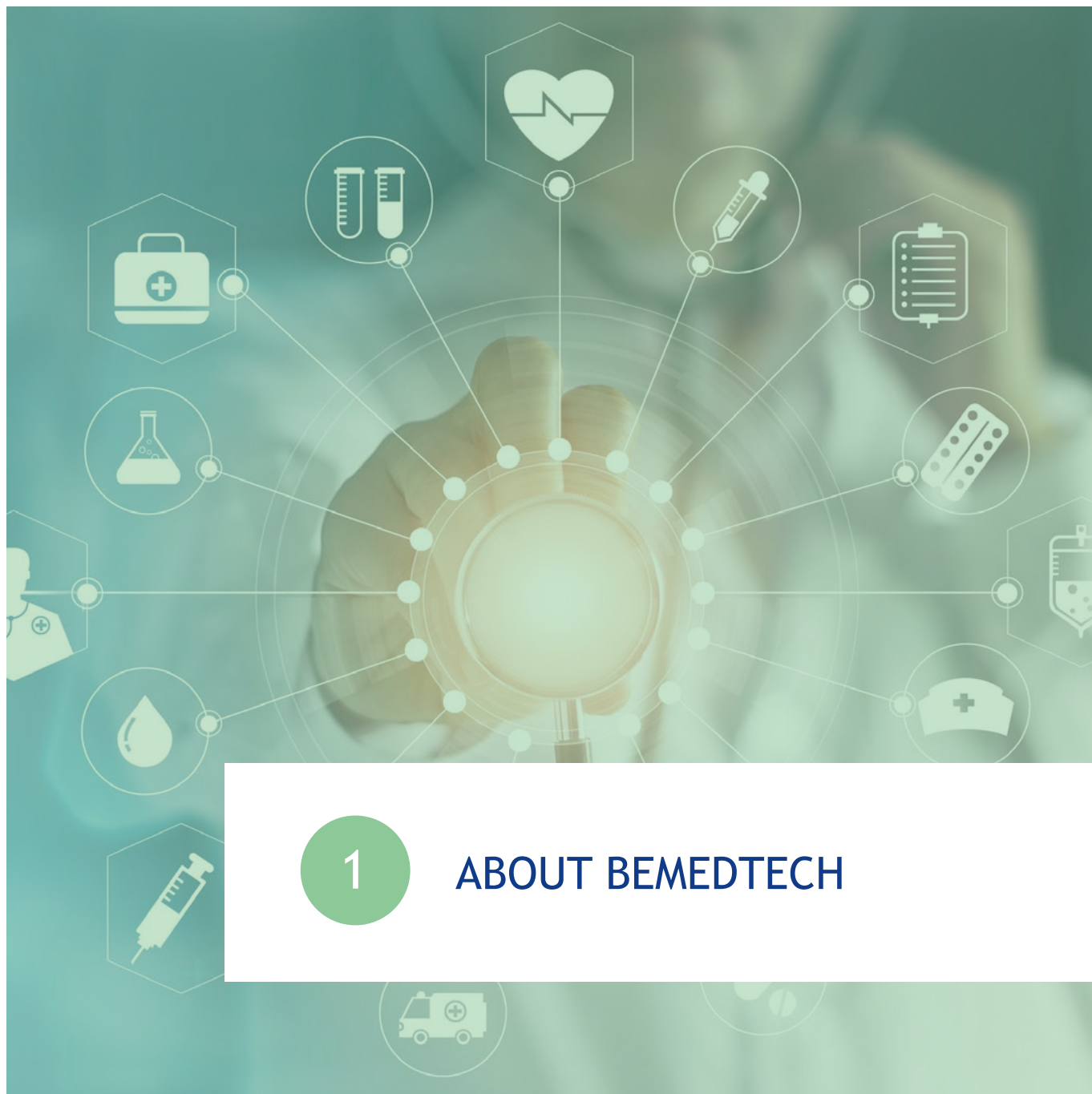
The Belgian Medical Technology Industry

FACTS & FIGURES 2022



TABLE OF CONTENT

ABOUT BEMEDTECH	4
Our mission	4
THE MEDICAL TECHNOLOGY MARKET IN BELGIUM	6
Market size	6
Workforce	6
Export	6
Product portfolio and activities	7
Patent applications & grants	8
PAST & FUTURE TRENDS MEDICAL DEVICES/IVD IN BELGIUM	11
Sales revenue	11
Workforce	11
Performance studies	12
Structural investments	13
Impact assessment of Belgian & European trends on profitability	14
PARTICIPANTS	16
Reference list	17



1

ABOUT BEMEDTECH

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beMedTech is the Belgian federation of the medical technology industry and has more than 200 affiliated companies.

Its members are manufacturers and/or distributors of medical devices and are divided into six product segments:

- 1) in-vitro diagnostics (IVD),
- 2) medical consumables,
- 3) implants and other invasive medical devices,
- 4) medical equipment and systems (MES),
- 5) digital medtech, and
- 6) services and technologies home assistance (STHA).

The Belgian medical technology industry represents over 500.000 technologies for an annual turnover of € 3,4 billion (not including export). It accounts for approximately 16.750 FTEs in Belgium.

Our mission

beMedTech unites the Belgian manufacturers and distributors of medical devices to emphasize their positive role for the healthcare sector. The beMedTech members invest in innovative medical technologies and in the training and education of health professionals. Together with its members, the federation contributes in a responsible manner, both to the quality of patient care and to the sustainability of the healthcare system.



IMPORTANT NOTICE:

Most facts & figures in this report are based on a survey on 2021 data collected in August-September 2022 amongst member companies of following industry associations: Agoria, beMedTech, LifeTech Brussels & Medvia.⁽¹⁾

In total 99 companies participated to this survey. Most of the companies that participated are suppliers to the in-hospital care and out-of-hospital care.

The results of this survey do not include the non-responders to the survey and the (made-to-measure) devices that are custom-made (by dental labs, orthotists, prosthetists, ...) or sold directly to end-users (such as hearing aids, eyewear,...).

If another source of information was used, this is mentioned in the text.



THE MEDICAL TECHNOLOGY MARKET IN BELGIUM

THE MEDICAL TECHNOLOGY MARKET IN BELGIUM

Medical technology or medical devices are all products and equipment that fall within the scope of the European Regulations 2017/745/EU (“MDR”) and 2017/746/EU (“IVDR”).

In their many forms, medical devices are with you from prevention, diagnosis, monitoring, evaluation to cure. There are three main categories of medical technologies⁽²⁾:

- + **MEDICAL DEVICES** are products, services or solutions that prevent, diagnose, monitor, treat and care for people. This category includes medical consumables, medical equipment and systems, implants and other invasive medical devices.
- + **IN VITRO DIAGNOSTICS** (IVDs) are non-invasive tests used on biological samples (for example blood, urine or tissues) to determine the status of a person’s health.
- + **DIGITAL HEALTH** are tools and services that use information and communication technologies (ICTs) to improve prevention, diagnosis, treatment, monitoring and management of a person’s health and lifestyle.

Medical technologies can be everyday objects such as band aids, syringes, surgical masks, and latex gloves, as well as spectacles, wheelchairs, COVID-19 tests and medical apps.

Medical technologies also include total body scanners, gene-mutation tests, implantable devices such as heart valves and pacemakers, and replacement joints for knees and hips. There are more than 500,000 medical technologies currently available.⁽²⁾

Market size in Belgium

3,4 billion EUR

Total yearly turnover in Belgium of medical devices/IVD excluding export (2021, excl. VAT)⁽³⁾



Workforce in Belgium

16.750 FTEs

working in the medical technology sector in 2021⁽⁴⁾



Export

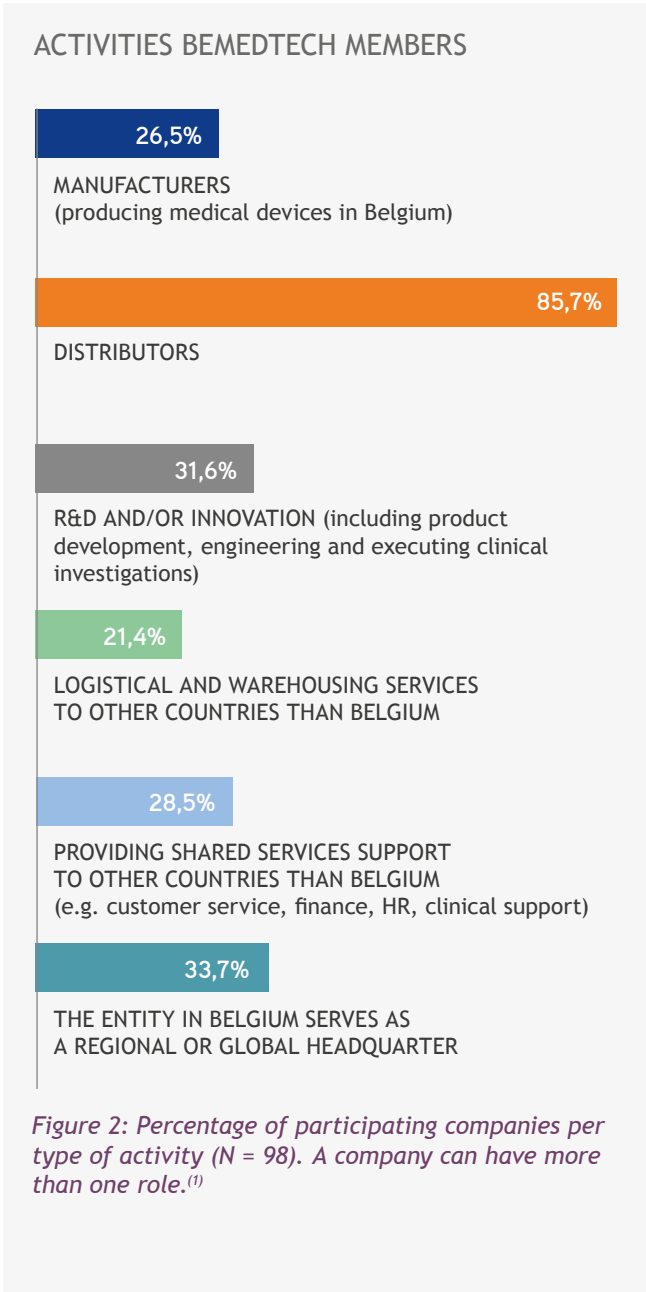
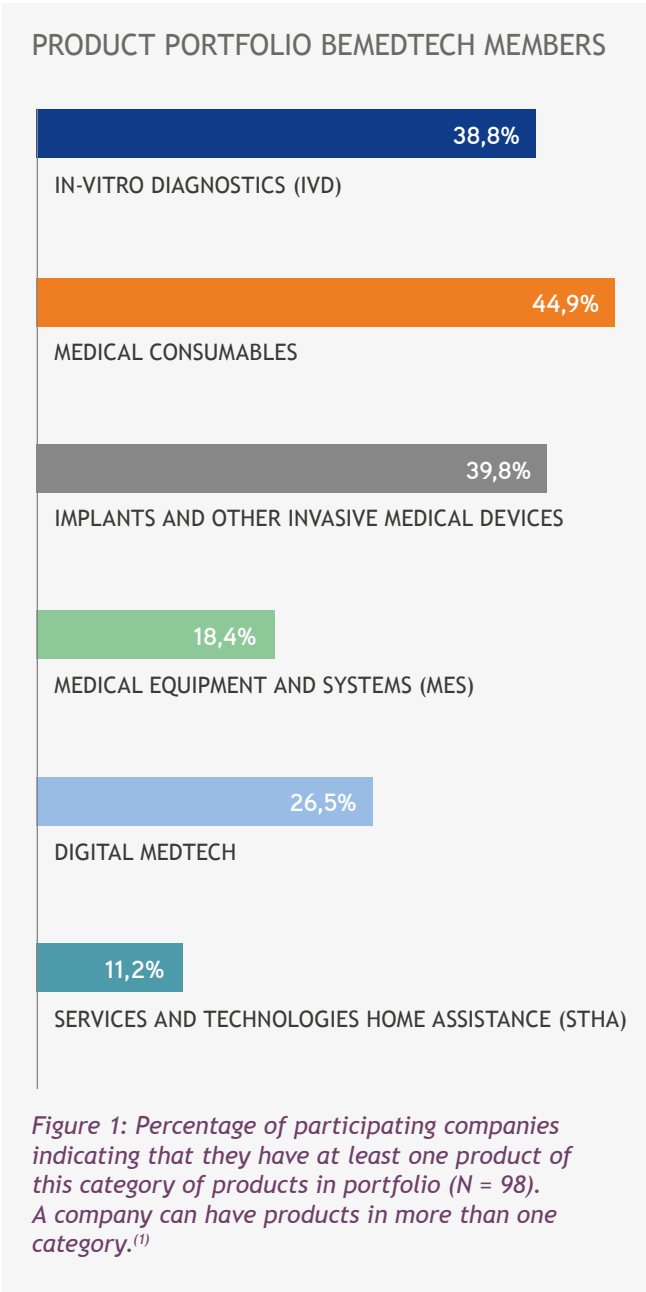
38,7 %*

Companies active in Belgium in medical devices/IVD export one or more of these products outside of Belgium⁽¹⁾



* N = 93

Product portfolio and activities



Patent applications & grants in Belgium

Medical technology is characterised by a constant flow of innovations, which are the results of a high level of research and development within the industry, and of close co-operation with users.

In 2021, 171 Belgian patent applications were filed with the European Patent Office (EPO) in the field of medical technology. For the period 2017-2021, 748 applications were filed, representing a 27% growth in patent applications compared to the years 2013-2017 (Figure 3).

The ratio of granted patents to patent applications stands at 40% in 2021 (69 grants). The medical technology field accounts for 6% of the total number of Belgian granted applications, the 2nd highest among all industrial sectors in Belgium (Figure 4).

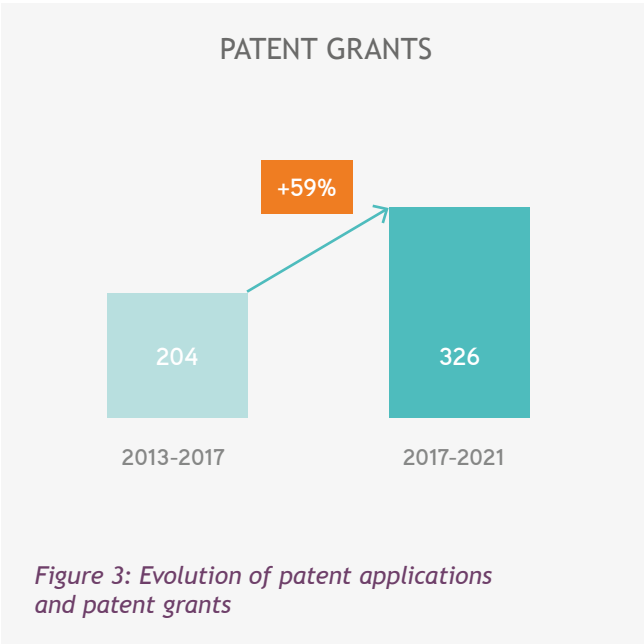
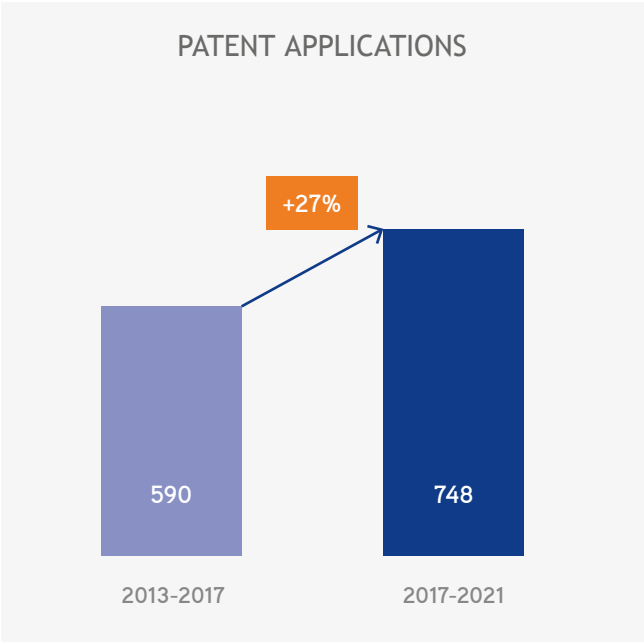


Figure 3: Evolution of patent applications and patent grants

PATENTS

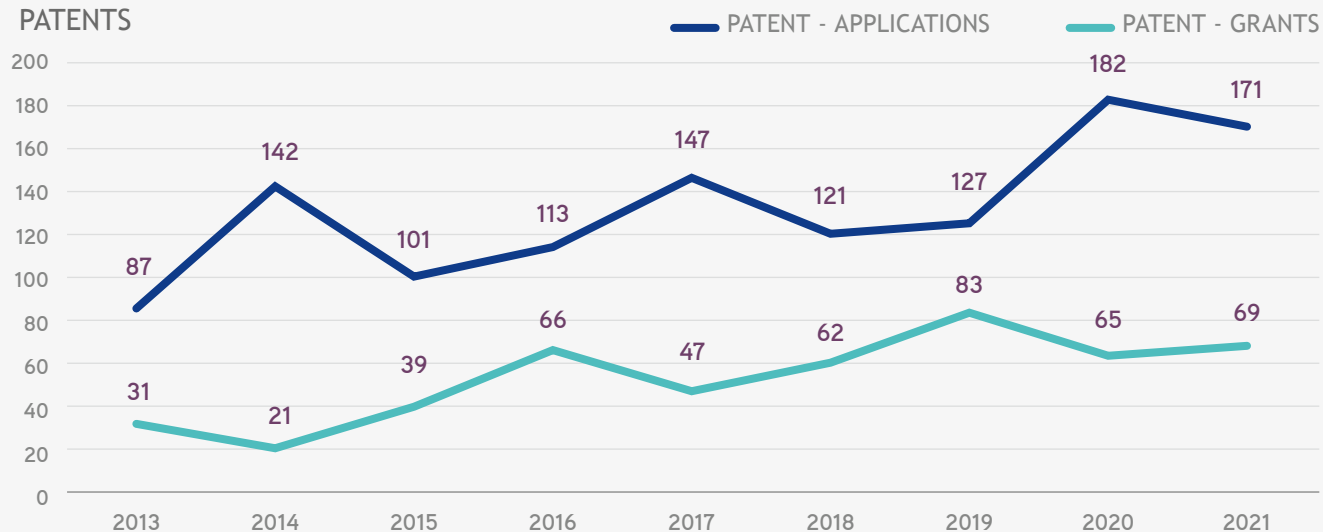


Figure 4: Medical technology patent applications and patent grants, evolution in Belgium for the years 2013 - 2021

PATENT GRANTS - 2021

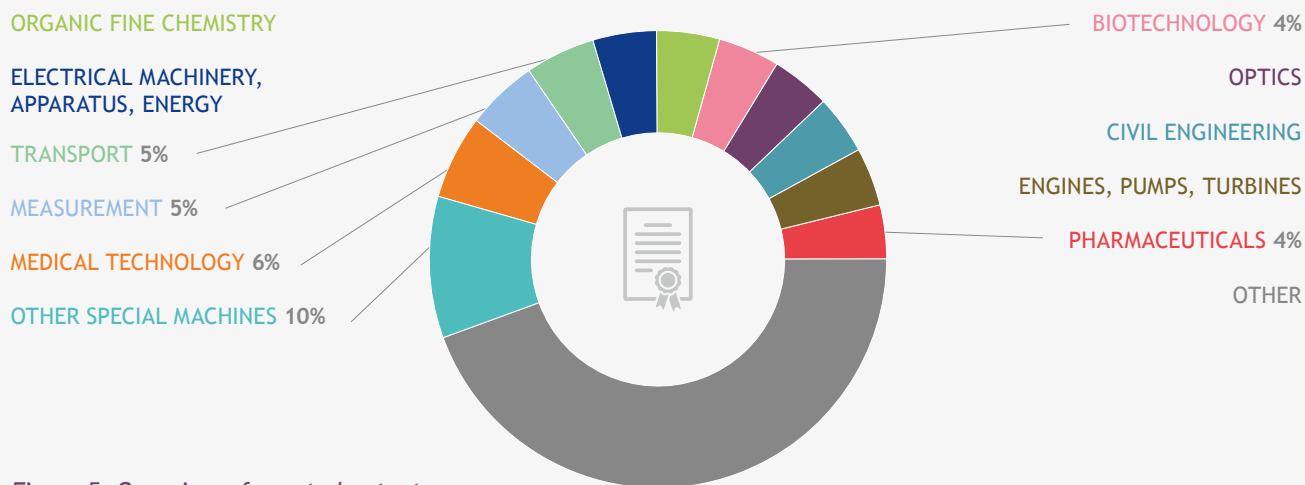


Figure 5: Overview of granted patents for the year 2021 by industry sector (Top 11) ⁽⁵⁾



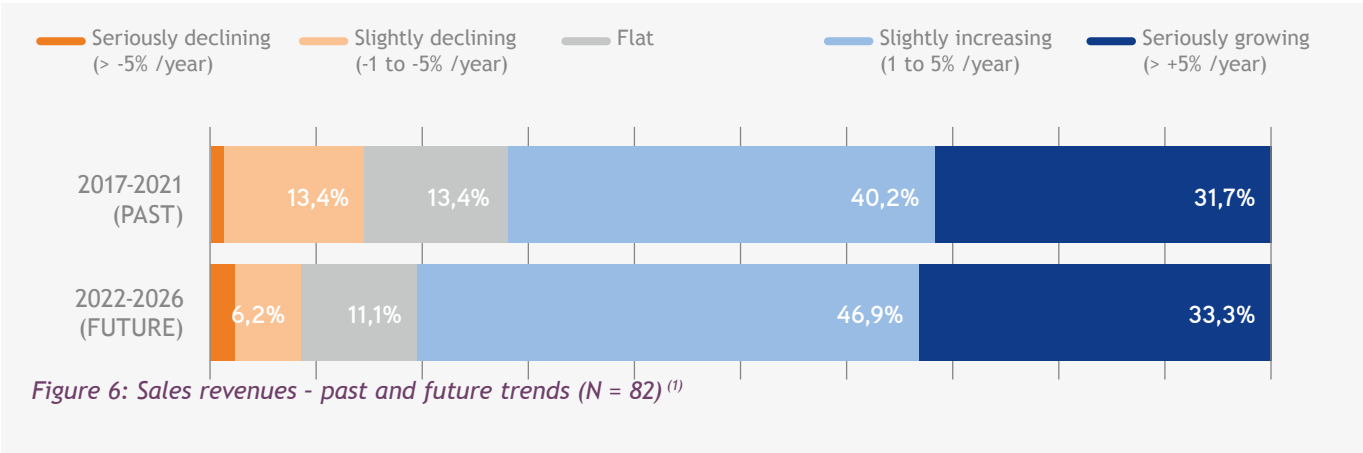
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PAST & FUTURE TRENDS MEDICAL DEVICES/IVD IN BELGIUM

PAST & FUTURE TRENDS MEDICAL DEVICES/IVD

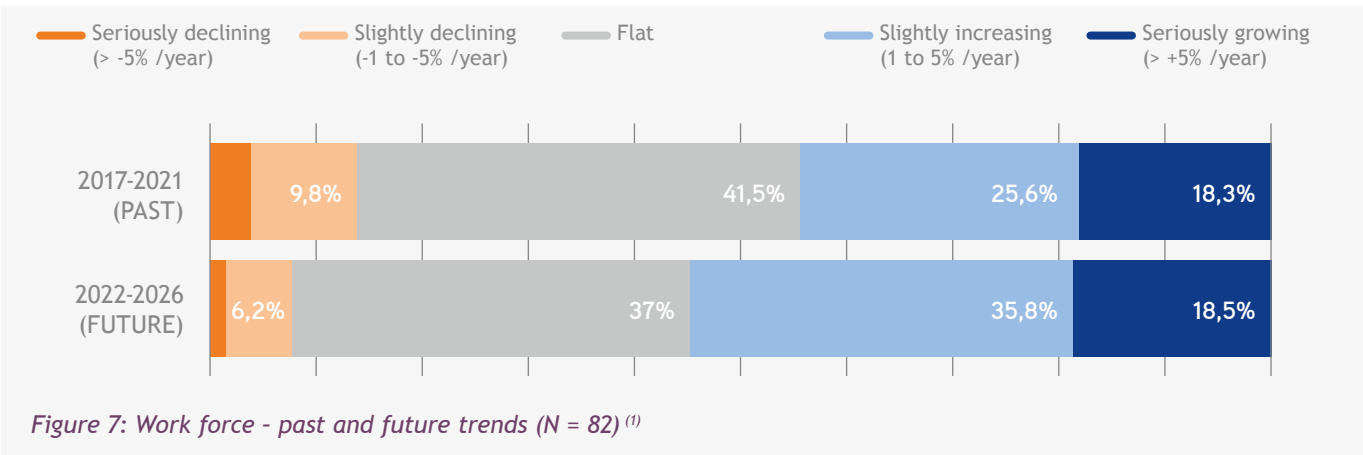
Sales revenue

Sales revenues have been trending upwards in the last 5 years for most of participating companies (72% of the companies reported an increase in sales revenues). Companies predict a continuation of this trend.⁽¹⁾



Workforce

A similar upward trend is seen in the development of the workforce, although with a lower growth rate (44% of the companies reported an increase of workforce in the past and 54% reported an expected increase in the future).⁽¹⁾



Clinical investigations and performance studies (partially) performed in Belgium in the period 2017-2021

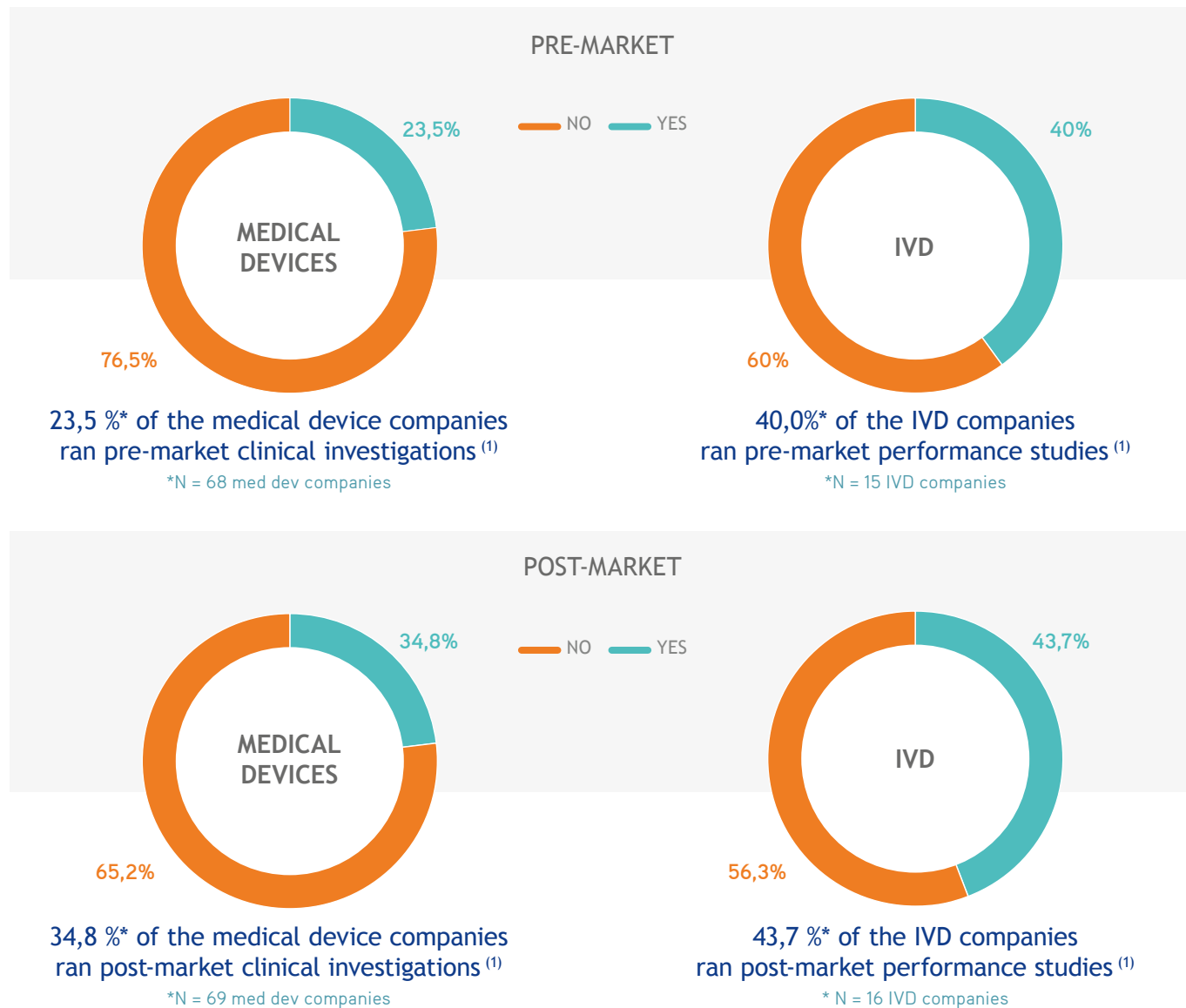


Figure 8: Overview of companies that ran pre-market and post-market performance studies

Structural investments

35,8 %*

of companies invested significantly*
in medical devices/IVD in Belgium
over the period 2017-2021 ⁽¹⁾

* Investments for a total of > 2 million EUR in setting up one or more activities in Belgium (new sales team, research, product development, production, logistics, ...)

N = 81 companies

29,6%*

of companies will invest significantly*
in medical devices/IVD in Belgium
in the next 5 years ⁽¹⁾

* Investments for a total of > 2 million EUR in setting up one or more activities in Belgium (new sales team, research, product development, production, logistics, ...)

N = 81 companies



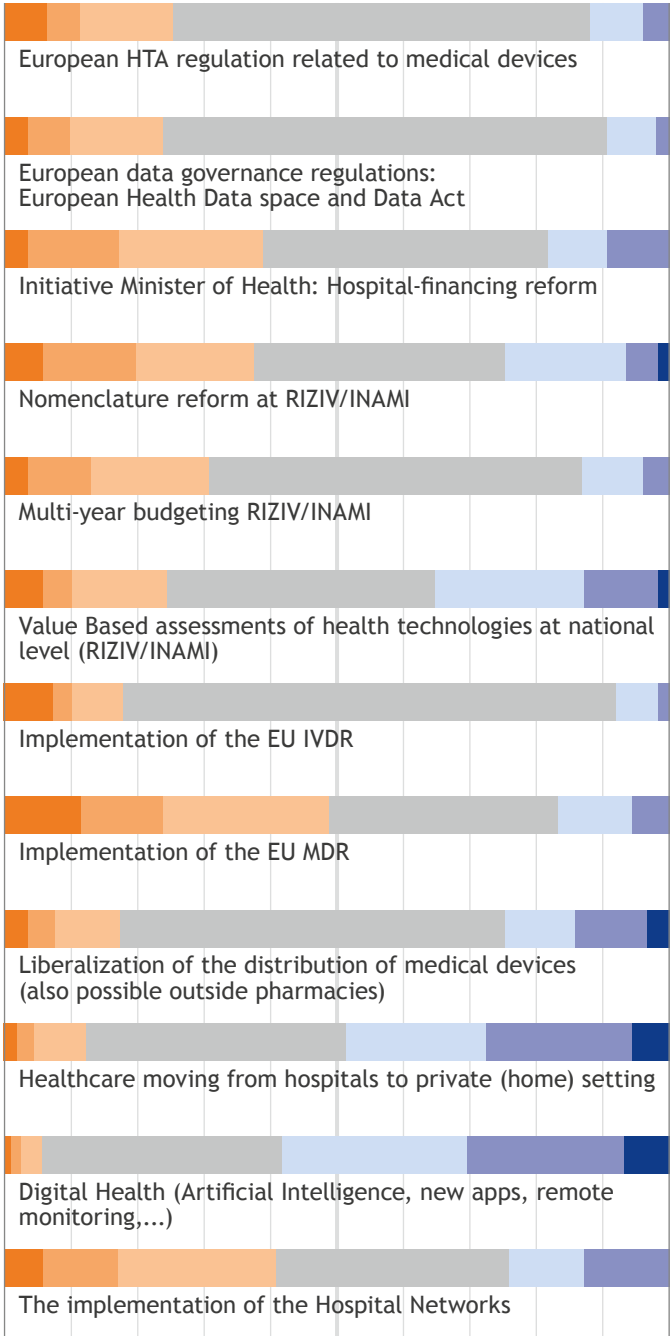
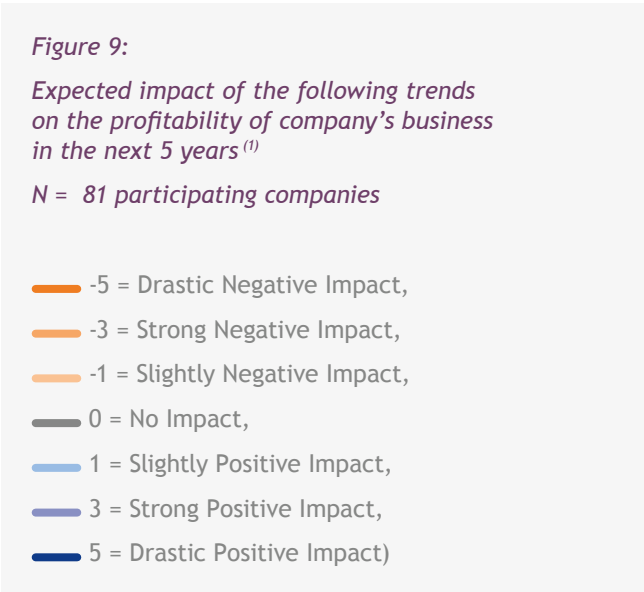
Impact assessment of Belgian & European trends on profitability

The healthcare environment undergoes many trends. Some of them are perceived as having a more negative impact on profitability, others are perceived as having a positive impact on profitability.

The implementation of the EU – MDR legislation is clearly perceived as having a more negative impact on the profitability of the participating companies.

The two trends that are clearly seen as opportunities are the digitalization of health, and the shift of care outside the hospitals, closer to the patient’s home setting. Also the trend towards more value-based assessments at national level are perceived as rather having a positive than a negative impact on profitability.

However, most trends are perceived as having no impact on profitability by the majority of the companies.





4

PARTICIPANTS

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Following members of Agoria, beMedTech, LifeTech Brussels, Medvia participated to the survey:

3M Belgium	RadioTherapy nv	Molnlycke Health Care NV	STAGO
Abbott	Demant Nederland B.V.	MONA.health	Straumann
Accuray	DIASORIN	moveUP	Stryker
AdlerOrtho	DUOMED Belgium NV	MSD	Sysmex
Agendia	Echosens	N.V. Paul Hartmann	TBS
Alcon	ERBE BELGIUM BVBA	Nestlé Health Science	Terumo Europe NV
Amplifon	Etac BV	Belux	Thermo Fisher
Arthrex	Exact Sciences	NeuroPath	Diagnostics
Ascensia Diabetes Care	Fresenius Medical Care	Neuroventis	Thuasne
Atos Medical	GE Healthcare	Nutrinomics	UniWeb
Audika	Glaukos Belgium	NuVasive Netherlands BV	Van Heek medical
Axonics, Inc.	GN Hearing	Olympus Belgium nv	Vedefar
B. Braun Medical	Gymna NV	Ontex BV	VH OPHTHALMICS BV
Bauerfeind Benelux BV	Heraeus Medical GmbH	Ophtalmo Service BV	Viatris
Baxter	Implantcast benelux	Orfit Industries	VitalAire - Air Liquide
Becton Dickinson (BD)	Johnson & Johnson	Oxycure sa-nv.	WS Audiology Benelux
Belgian Volition	Medical NV	Oxysphair	B.V.
Biocartis	LeMaitre Vascular	Permobil BeNeLux BV	
bioMérieux Benelux	Lifescan	Qompium (FibriCheck)	
Boston Scientific	Linde Homecare Belgium	QRS Belgium	
Byteflies	Lohmann & Rauscher	Remecare BV	
Cepheid Benelux BV	Mathys Orthopaedics	Remedus	
Cochlear	BeLux	Roche Diagnostics	
Coloplast Belgium	Medacta Belgium	Belgium	
Comarch AG	Medi Belgium	Sebia Benelux	
Convatec	Mediplus	Siemens Healthcare	
Cook Belgium BV	Medis Medical Imaging	Smith+Nephew	
De Ceunynck	Systems bv	SomnoMed	
Ophthalmology	Medtronic Belgium NV SA	Sonova Retail Belgium	
De Ceunynck	Menarini Benelux	SOS OXYGENE Benelux	

REFERENCE LIST

1. beMedTech. Survey amongst members: Facts & Figures 2022.
2. [MedTech Europe](#). s.n., 2022.
3. [Statista](#). s.n.
4. www.finchcheck.be. Selection of relevant companies with NACEBEL codes 32500, 46460. s.n.
5. [European Patent Office](#). s.n.





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