

# ■ THE NUMEROF 2025 GLOBAL MEDICAL DEVICE OUTLOOK

## Key Action Steps

- Innovate new products/services for select markets and use across the care continuum, including health at home.
- Craft compelling databased economic & clinical value narratives that resonate with key stakeholders.
- Redesign commercial and medical models.
- Align R&D, Medical Affairs, Commercial functions.
- Recruit, train talent to engage executive decision makers.
- Elevate business acumen, diagnostic, and influence skills.
- Structure more strategic collaborations with providers/payers.

Pharma

Use of AI and predictive analytics. More product development collaborations, **combining drugs, devices, and diagnostics**.

Retail

More opportunities to **provide products to new decision makers**. **Migration of care** creates new partnerships.

Physician

**Physicians** guided by institutional formularies, care paths, **less influential** in decision making. Engagement requires new omnichannel approaches. **Access restrictions** remain for some TAs.

Healthcare Delivery

Decisions centralized in **corporate committees**. Increased focus on cost, evidence. Resistant to new technology. More HTAs, care paths. Move to value-based models creates interest in **risk-sharing** and services. Focus on health equity. **Migration of care** to less intensive settings creates risk and opportunity.

Global Medical Devices



Employer

Increased **interest in reducing total cost of care/improving outcomes** could create opportunities for adaptive manufacturers.

Consumer

**Pricing transparency** likely to drive **more shopping** for lower cost, high quality procedures. More engaged in healthcare, **choice of tests and products**. Interest in convenience of less intensive settings, **health at home**.

Regulator (FDA, DOJ, EMA, etc.)

**New, stricter regulations** (IVDR, MDR). **Tough enforcement** of manufacturing, provider payment, marketing rules, and **adverse event reporting**. **Cost effectiveness evidence, RWE** play bigger role in approvals. Strategic rethinking of **global supply chains and reshoring**.

Public Payer/ Benefit Evaluator

In the US, **political and legislative action** creates risk and opportunity. More **transparency** for comparative quality, pricing. **Emerging market** opportunity with greater price sensitivity. More focus on **RWE and cost effectiveness**.

Private Payer/ PBM

Increased **demand for evidence**: better outcomes, lower cost. Increasing price **transparency**. More outcomes-based **value contracting**. Interest in care migration to lower total cost of care.