

# Medical Device Contract Manufacturing Global Market – Forecast To 2028

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## Abstracts

Medical device contract manufacturing is a business model in which a medical device company or Original Equipment Manufacturer (OEM) outsources certain or the whole production activities of their whole medical device or certain components of the device to another company with specialized knowledge, technical expertise and efficient business operations. The services offered by the medical device contract manufacturing (MDCM) firms consist of product design and development, product manufacturing and assembly, quality assurance and control services, packaging and sterilization services and regulatory consulting services. Today's contract manufacturers, in response to the rapidly growing and evolving medical device industry, have broadened their manufacturing capabilities, technological expertise and business definitions to transform themselves into 'total solutions provider' or 'full-service provider' or 'end to end solution provider' or 'one-stop shopping destination'. Increasing pressure of healthcare cost curbs on medical device companies, the need to reduce time to market, to manufacture competitively advantageous and distinct products at a reduced cost, to streamline in house processes and focus more on critical business areas or competencies and gaining access to advanced technologies are fuelling the growth in medical device contract manufacturing market.

As estimated by IQ4I analysis, the medical device contract manufacturing global market is expected to grow at a mid single digit CAGR to reach \$82,035.6 million by 2028 due to the increasing trend of outsourcing among the medical device OEMs to enhance the speed to market of their proprietary products economically, the necessity for OEMs to perpetuate or increase their market share and achieve operational efficiency and competitive edge over their peers by gaining timely, cost effective access to the advanced, flexible and multiple product manufacturing capabilities of CMOs, the need to meet the huge volume medical device demand associated with persistently escalating

prevalence of chronic and infectious diseases and the gradual transition of medical device market from the reprocessed to the value enhanced and cost-efficient single use devices, increase in surgical procedural volume and hospitalizations across the globe, the requirement of medical device companies to keep pace with the technological advancements of the medical device market, the requisite to meet the various medical needs of the steadily escalating geriatric population and the trend of consolidation of MDCM industry.

The medical device contract manufacturing global market is categorized into various market segments based on the device type, services offered, product type, application and geography. Based on the device type, the market is bifurcated into Electronic Medical Device Contract Manufacturing and Non-Electronic Medical Device Contract Manufacturing. Among these, Electronic medical device contract manufacturing segment represents the largest and is the fastest emerging device type service segment that is expected to grow at a mid single digit CAGR from 2021 to 2028.

Based on services provided, the medical device contract manufacturing market is classified into Product Design and Development Services, Product Manufacturing and Assembly Services, Quality Assurance and Quality Control (QA and QC) Services, Packaging and Sterilization Services and Regulatory Consulting Services. Among these, Product Manufacturing and Assembly Service is the largest and fastest emerging service segment and is expected to grow at a mid single digit CAGR during the forecasted period.

Based on product type, the medical device contract manufacturing market is segmented into services for Diagnostic and Monitoring Devices, Therapeutic Devices, Drug Delivery Devices and other medical devices comprised of Life-supportive and patient assistive devices, surgical devices, endoscopes and adult diapers. Among these, Therapeutic devices contract manufacturing services segment accounted for the largest share or revenue in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. Drug delivery devices contract manufacturing segment is the fastest emerging segment and is expected to grow at a mid single digit CAGR during the forecasted period.

The medical device contract manufacturing market based on applications is grouped into services for application markets of Cardiovascular diseases (CVD), Diagnostic Imaging, Orthopedics, Endoscopy, Dental, Diabetes Care, Wound care devices services, Nephrology, In-vitro diagnostics (IVD), Respiratory care and services for Other applications consisting of ophthalmology, neurology, medical robotics, ENT and incontinence (urinary and fecal). Among these, the IVD application market accounted

for the largest share of revenue in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. Orthopedics devices contract manufacturing is the fastest emerging application segment and is expected to grow at a mid single digit CAGR during the forecasted period.

The Medical device contract manufacturing global market is mainly divided into four major geographies, namely, North America, Europe, Asia-Pacific and Rest of World (ROW). Among these, North America dominates the medical device contract manufacturing global market with a in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. Asia-Pacific region is the fastest emerging region and is expected of growing a high single digit CAGR from 2021 to 2028.

The medical device contract manufacturing global market is highly fragmented without a dominant major player in the market that offers huge opportunities for small and medium-sized companies with distinct services for advanced devices in the market. The top six players occupy only a minor share of the medical device contract manufacturing market and the remaining majority share of the market is occupied by other players. Some of the key players in the medical device contract manufacturing global market are Jabil Inc. (U.S.), Integer Holdings Corporation (U.S.), Flex Ltd. (Singapore), Celestica Inc. (Canada), Sanmina Corporation (U.S.), Plexus Corp. (U.S.), Gerresheimer AG (Germany), Molex, LLC (U.S.), Viant (U.S.), TE Connectivity (Switzerland), Tecomet (U.S.), Orchid Orthopedic Solutions (U.S.) and others.

The report provides an in-depth market analysis of the above-mentioned segments across the following regions:

North America

U.S.

Rest of North America

Europe

Germany

U.K.

France

Rest of Europe

Asia-Pacific

Japan

China

India

Rest of APAC

Rest of the World (RoW)

Brazil

Rest of Latin America

Middle East & Africa

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- FIGURE 22 NON-ELECTRONIC MEDICAL DEVICE CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BASED ON REGION, (2021 V/S 2028) (%)
- FIGURE 23 MEDICAL DEVICE CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BASED ON SERVICE TYPE (2021 V/S 2028) (%)
- FIGURE 24 PACKAGING AND STERILIZATION SERVICES GLOBAL MARKET SHARE, BASED ON REGION, (2021 V/S 2028) (%)
- FIGURE 25 MEDICAL DEVICE CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BASED ON PRODUCT TYPE (2021 V/S 2028) (%)
- FIGURE 26 DIAGNOSTIC AND MONITORING DEVICES CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BASED ON REGION, (2021 V/S 2028) (%)
- FIGURE 27 OTHER MEDICAL DEVICES CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BASED ON REGION, (2021 V/S 2028) (%)
- FIGURE 28 MEDICAL DEVICE CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BASED ON APPLICATION (2021) (%), CAGR (%)
- FIGURE 29 ORTHOPEDIC DEVICES CONTRACT MNAUFACTURING GLOBAL MARKET SHARE, BASED ON REGION, (2021 V/S 2028) (%)
- FIGURE 30 NEPHROLOGY DEVICES CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BASED ON REGION, (2021 V/S 2028) (%)
- FIGURE 31 IN-VITRO DIAGNOSTICS CONTRACT MNAUFACTURING GLOBAL MARKET SHARE, BASED ON REGION, (2021 V/S 2028) (%)
- FIGURE 32 RESPIRATORY DEVICES CONTRACT MNAUFACTURING GLOBAL MARKET SHARE, BASED ON REGION, (2021 V/S 2028) (%)
- FIGURE 33 OTHER APPLICATIONS GLOBAL MARKET SHARE, BASED ON REGION, (2021 V/S 2028) (%)
- FIGURE 34 MEDICAL DEVICE CONTRACT MANUFACTURING GLOBAL MARKET REVENUE, BASED ON REGION (2020-2028) (\$MN), CAGR (%)
- FIGURE 35 MEDICAL DEVICE CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BASED ON REGION (2021) (%)
- FIGURE 36 NORTH AMERICA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON DEVICE TYPE (2021 V/S 2028) (%)
- FIGURE 37 NORTH AMERICA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON PRODUCT TYPE (2021 V/S 2028) (%)
- FIGURE 38 NORTH AMERICA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON SERVICE TYPE (2021 V/S 2028) (%)
- FIGURE 39 NORTH AMERICA MEDICAL DEVICE CONTRACT MANUFACTURING

MARKET SHARE, BASED ON APPLICATION, (%), CAGR (%)

FIGURE 40 NORTH AMERICA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON COUNTRY (2021 V/S 2028) (%)

FIGURE 41 U.S. MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 42 U.S. MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON SERVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 43 U.S. MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 44 REST OF NORTH AMERICA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 45 REST OF NORTH AMERICA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON SERVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 46 REST OF NORTH AMERICA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 47 EUROPE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON DEVICE TYPE (2021 V/S 2028) (%)

FIGURE 48 EUROPE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON PRODUCT TYPE (2021 V/S 2028) (%)

FIGURE 49 EUROPE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON SERVICE TYPE (2021 V/S 2028) (%)

FIGURE 50 EUROPE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON APPLICATION (2021) (%), CAGR (%)

FIGURE 51 EUROPE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON COUNTRY (2021 V/S 2028) (%)

FIGURE 52 GERMANY MEDICAL DEVICE CONTRACT MANUFACTURING GLOBAL MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 53 GERMANY MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON SERVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 54 GERMANY MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 55 U.K. MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 56 U.K. MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON SERVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 57 U.K. MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 58 FRANCE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 59 FRANCE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON SERVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 60 FRANCE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 61 REST OF EUROPE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 62 REST OF EUROPE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 63 REST OF EUROPE MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 64 APAC MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON DEVICE TYPE (2021 V/S 2028) (%)

FIGURE 65 APAC MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON PRODUCT TYPE (2021 V/S 2028) (%)

FIGURE 66 APAC MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON SERVICE TYPE (2021 V/S 2028) (%)

FIGURE 67 APAC MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON APPLICATION (2021) (%), CAGR (%)

FIGURE 68 APAC MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON COUNTRY (2021 V/S 2028) (%)

FIGURE 69 JAPAN MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 70 JAPAN MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON SERVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 71 JAPAN MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 72 CHINA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 73 CHINA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON SERVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 74 CHINA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 75 INDIA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 76 INDIA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON SERVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 77 INDIA MEDICAL DEVICE CONTRACT MANUFACTURING GLOBAL MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 78 REST OF APAC MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 79 REST OF APAC. MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON SERVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 80 REST OF APAC MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 81 ROW MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON DEVICE TYPE (2021 V/S 2028) (%)

FIGURE 82 ROW MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON PRODUCT TYPE (2021 V/S 2028) (%)

FIGURE 83 ROW MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON SERVICE TYPE (2021 V/S 2028) (%)

FIGURE 84 ROW MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON APPLICATION (2021) (%), CAGR (%)

FIGURE 85 ROW MEDICAL DEVICE CONTRACT MANUFACTURING MARKET SHARE, BASED ON COUNTRY (2021 V/S 2028) (%)

FIGURE 86 BRAZIL MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 87 BRAZIL MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON SERVICE TYPE (2021 V/S 2028) (\$MN)

FIGURE 88 BRAZIL MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 89 REST OF LATAM MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 90 REST OF LATAM MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON SERVICE, (2021 V/S 2028) (\$MN)

FIGURE 91 REST OF LATAM MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028) (\$MN)

FIGURE 92 MIDDLE EAST & AFRICA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON DEVICE AND PRODUCT TYPE (2021 V/S 2028) (\$MN)

FIGURE 93 MIDDLE EAST & AFRICA MEDICAL DEVICE CONTRACT MANUFACTURING MARKET REVENUE, BASED ON SERVICES (2021 V/S 2028)

(\$MN)

FIGURE 94 MIDDLE EAST & AFRICA MEDICAL DEVICE CONTRACT  
MANUFACTURING MARKET REVENUE, BASED ON APPLICATION (2021 V/S 2028)

(\$MN)

FIGURE 95 KEY GROWTH STRATEGIES, (2020-2021)

FIGURE 96 SWOT: CELESTICA INC.

FIGURE 97 SWOT: FLEX LTD.

FIGURE 98 SWOT: GERRESHEIMER AG

FIGURE 99 SWOT: INTEGER HOLDING CORPORATION

FIGURE 100 SWOT: JABIL INC.

FIGURE 101 SWOT: MOLEX, LLC

FIGURE 102 SWOT: PLEXUS CORP.

FIGURE 103 SWOT: SANMINA CORPORATION

FIGURE 104 SWOT: TE CONNECTIVITY

FIGURE 105 SWOT: VIANT

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