

Medical Device Design and Development Services Market Size, Share and Growth Outlook 2026: By Service Type, By Medical Device Type, By Device Class, By End User, Companies to 2034

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Abstracts

The global Medical Device Design and Development Services Market size is forecast to increase from \$14.96 Billion in 2026 to \$41.49 Billion in 2034 at a CAGR of 13.6% between 2026 and 2034.

The Medical Device Design and Development Services market report provides detailed analysis and outlook of Medical Device Design and Development Services segments including By Service Type (Designing and Engineering Services, Machining Services, Molding Services, Packaging Services), By Medical Device Type (Drug Delivery Devices, Diagnostic Devices, Cardiovascular Devices, Orthopedic Devices, Surgical Devices, Sleep and Respiratory Devices, Ophthalmology Devices, Dental Devices), By Device Class (Class I, Class II, Class III), By End User (Medical Device Companies, Biotechnology Companies, Research Institutions) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Medical Device Design and Development Services Industry Overview

Digital Health Engineering and Collaborative Design Models Redefine Product Development

The medical device design and development services industry is evolving rapidly as software-driven healthcare technologies, regulatory complexity, and accelerated innovation cycles reshape engineering requirements. Service providers are expanding

beyond traditional product design to deliver integrated capabilities spanning software architecture, usability engineering, regulatory strategy, validation, risk management, and commercialization support. The growing adoption of Software as a Medical Device (SaMD), connected health platforms, artificial intelligence, and digital therapeutics is driving demand for multidisciplinary development frameworks that incorporate clinical, technical, and regulatory expertise from the earliest stages of product creation. These changes are transforming engineering service firms into strategic innovation partners throughout the medical device lifecycle.

Co-Design Methodologies Strengthen User-Centered Medical Device Development

Human-centered engineering approaches are becoming a central element of modern medical device development programs. System developers and academic partners formalized an operational framework for the engineering co-design protocol supporting NCare, a smartphone-based Software as a Medical Device developed to track complex motor symptoms. The framework reflects a broader industry shift away from siloed engineering processes toward collaborative and iterative development models. Early-stage workshops increasingly integrate end users, software engineers, clinical stakeholders, commercial teams, and regulatory specialists into the architectural design process. This multidisciplinary approach helps improve usability, clinical relevance, software performance, and regulatory readiness while reducing downstream development risks. As digital health products become more sophisticated, co-design methodologies are emerging as a critical differentiator for medical device engineering service providers.

Regulatory Standardization Accelerates Adaptive Software Development

Regulatory modernization is creating new opportunities for software-centric medical device innovation. Structural alignment initiatives across major regulatory jurisdictions, including the U.S. FDA, European Union, and several Asian markets, are advancing the standardization of Pre-determined Change Control Plans (PCCP). These frameworks enable approved algorithms to evolve and improve in real-world environments without requiring entirely new premarket approval pathways for every modification. In response, medical device design and engineering firms are restructuring research and development pipelines to support continuous software improvement, lifecycle management, and adaptive algorithm deployment. The growing acceptance of PCCP-based regulatory strategies is increasing demand for specialized expertise in software validation, cybersecurity, data governance, and regulatory documentation across global healthcare markets.

Nearshoring and Advanced Engineering Ecosystems Expand Global Service Capabilities

Regional engineering hubs are increasingly playing a strategic role in the global medical device development ecosystem. A comprehensive industrial audit by the Economic Commission for Latin America and the Caribbean highlighted the structural transformation occurring in Baja California, Mexico. The region is advancing beyond low-complexity contract manufacturing toward higher-value original equipment manufacturer activities, advanced design validation, engineering support services, and specialized post-production sterilization capabilities. This evolution is strengthening the region's position as a nearshoring destination for major global medical technology companies, including Medtronic and Stryker. The combination of engineering expertise, manufacturing infrastructure, regulatory capabilities, and geographic proximity to North American markets is accelerating the growth of integrated medical device design and development services across the region.

Medical Device Design and Development Services Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Medical Device Design and Development Services market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Battelle Memorial Institute, Jabil Inc., Plexus Corp., Sanmina Corporation, Celestica Inc., Integer Holdings Corporation, TE Connectivity, Benchmark Electronics, Inc., Heraeus Medical Components, Kimball Electronics, Inc.. The Medical Device Design and Development Services market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Medical Device Design and Development Services industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

Growth Medical Device Design and Development Services Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Medical Device Design and Development Services companies

Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

Detailed SWOT Analysis of global and regional Medical Device Design and Development Services markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Medical Device Design and Development Services Market Competitive Benchmarking and Company Analysis

Leading companies in Medical Device Design and Development Services industry include- Battelle Memorial Institute, Jabil Inc., Plexus Corp., Sanmina Corporation, Celestica Inc., Integer Holdings Corporation, TE Connectivity, Benchmark Electronics, Inc., Heraeus Medical Components, Kimball Electronics, Inc.. The Medical Device Design and Development Services market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Medical Device Design and Development Services Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Medical Device Design and Development Services market remains one of the strongest-performing segments in the country.

The US Medical Device Design and Development Services Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Medical Device Design and Development Services market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Medical Device Design and Development Services industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Medical Device Design and Development Services markets

Canada's strong Medical Device Design and Development Services sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Medical Device Design and Development Services market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Medical Device Design and Development Services Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Medical Device Design and Development Services market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering

90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Medical Device Design and Development Services population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Medical Device Design and Development Services industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Medical Device Design and Development Services market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Medical Device Design and Development Services sales through 2034

France Medical Device Design and Development Services companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Medical Device Design and Development Services Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Medical Device Design and Development Services distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending

grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Medical Device Design and Development Services Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Medical Device Design and Development Services market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Medical Device Design and Development Services industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Medical Device Design and Development Services industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Medical Device Design and Development Services Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Medical Device Design and Development Services market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Medical Device Design and Development Services market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Medical Device Design and Development Services Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Medical Device Design and Development Services Market Segmentation

By Service Type

Designing and Engineering Services

Machining Services

Molding Services

Packaging Services

By Medical Device Type

Drug Delivery Devices

Diagnostic Devices

Cardiovascular Devices

Orthopedic Devices

Surgical Devices

Sleep and Respiratory Devices

Ophthalmology Devices

Dental Devices

By Device Class

Class I

Class II

Class III

By End User

Medical Device Companies

Biotechnology Companies

Research Institutions

Leading Companies in Medical Device Design and Development Services Industry
(2026)

Battelle Memorial Institute

Jabil Inc.

Plexus Corp.

Sanmina Corporation

Celestica Inc.

Integer Holdings Corporation

TE Connectivity

Benchmark Electronics, Inc.

Heraeus Medical Components

Kimball Electronics, Inc.

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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