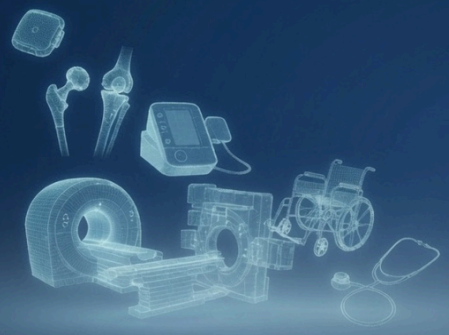

Where MedTech Distributors Grow Together.

Building MedTech's Most Trusted Network.

INTMEDA.COM

SECTION 01 · MARKET OVERVIEW

Global & European MedTech Market

GLOBAL MARKET

€573.4B	+5.5%	€748.0B
Market size 2026E	CAGR 2026–30	Projection 2030

EUROPE MARKET

€133.2B	+5.4%	€173.8B
Market size 2026E	CAGR 2026–30	Projection 2030

INDUSTRY COMPARISON · PHARMACEUTICAL DISTRIBUTION

€1,190.1B	+7.3%	€1,578.7B
Global 2026E	CAGR 2026–30	Projection 2030

Figures are the Business Research Company's healthcare distribution market, the scope that includes pharmaceutical product distribution, converted at US$1.1225 per euro (ECB, 19 Nov 2026). Pharmaceutical distribution runs on very large volumes at thin unit margins, and value rests on licensing, temperature-controlled handling and manufacturer contract terms, the kind of capability UPS agreed to buy in Australia this week. Technavio puts pharmaceutical wholesale and distribution growth at 9.7% a year over 2026–2030, so estimates vary with scope.

EXHIBIT 1 · MARKET SEGMENTS RANKED BY GLOBAL SIZE, 2026 (€ BILLIONS)

SEGMENT	GLOBAL 2026E	EUROPE	CAGR 26–30	2030P
Cardiovascular Devices	57.4	15.2	+8.4%	79.5
Orthopaedic Devices	52.1	13.8	+4.8%	63.0
Patient Monitoring Systems	49.9	13.2	+7.4%	66.4
Wearable Healthcare Devices	46.2	12.2	+10.9%	69.9
Diabetes Care Devices	35.4	9.4	+12.3%	56.3
Urology Devices	34.7	9.2	+6.0%	42.6
Diagnostic Imaging	25.5	6.7	+4.4%	30.3
Wound Care	21.8	5.7	+6.5%	28.0
Medical Aesthetics	20.3	5.4	+13.0%	33.1
General Surgery Devices	19.9	5.3	+8.5%	27.6
Neurology Devices	13.9	3.7	+8.9%	19.6
Gynecological Devices	11.1	2.9	+8.0%	15.1
Sports Medicine	7.9	2.1	+8.6%	10.9
AI in Diagnostics	2.2	0.6	+22.5%	5.0

Data note. IVD excluded; medical devices and technology only. Tier-1 estimates, not additive: segment definitions overlap materially (CGMs span Diabetes Care, Wearables and Patient Monitoring simultaneously). Sources: Grand View Research; MarketsandMarkets; Mordor Intelligence; IMARC Group; MedTech Europe Facts & Figures 2025.

SECTION 02 · KEY REPORTS, ARTICLES & ANALYSES

Leading Consultancies & Research

DEALROOM.CO NOV 2026

Health Tech & Medtech Unicorns: the Private Companies Valued at US$1B or More

- **Scale:** Dealroom's tracker, marked as updated in November 2026, lists 210 Health Tech & Medtech unicorns, companies with a verified valuation of US$1B or more, worth US$677.2B combined (about €603.3B at US$1.1225 per euro).
- **Revenue-backed tier:** A further 36 companies are classed as thoroughbreds, meaning they generate US$100M or more in annual revenue.
- **Ranking:** Every unicorn is ranked by latest valuation and carries a company profile, giving a running view of the best-capitalised private companies in the sector.
- **Definition matters:** Dealroom's wider sector overview table shows 142 unicorns and US$720B combined value, so counts move with how the sector is defined.

DISTRIBUTOR IMPLICATION

A deep pool of well-capitalised private health technology companies means a steady supply of manufacturers heading for international launches. Those with US$100M of revenue already behind them are the ones with proven products to place through distributors.

SOURCE ›

CPI (UK CENTRE FOR PROCESS INNOVATION) DATE UNCONFIRMED

Accelerating MedTech Innovation: From Discovery to Impact

- **Evidence base:** CPI's MedTech research draws on 240 SMEs, UK investors and 10 university technology transfer offices.
- **Regulation:** Innovators describe the regulator as under-resourced and difficult to navigate; CPI's MARRS and HealthTRIP programmes have supported more than 400 UK companies through regulatory barriers.
- **Demand signals:** Fragmented procurement and the lack of a clear mechanism for understanding demand deter investors. CPI proposes an NHS Priority & Clinical Register publishing unmet needs and procurement intentions.
- **Funding:** The recommendations include more SME funding through the Seed Enterprise Investment Scheme and the Enterprise Investment Scheme, in a sector CPI puts at more than £30 billion to the UK economy and around 145,000 jobs.

DISTRIBUTOR IMPLICATION

A published register of NHS needs and procurement intentions would make UK public demand visible ahead of tender, which is the information a distributor uses to decide where to place stock and bids. Faster regulatory routes for UK start-ups also widen the pool of UK-origin products looking for export partners.

SOURCE ›

SECTION 03 · KEY M&A & STRATEGIC CONSOLIDATION

Distributor Activity

ACQUIRER	TARGET	VALUE
UPS	Smartways Logistics	Undisclosed

GEOGRAPHY
Australia & New Zealand

SEGMENT
Healthcare logistics

UPS announced on 17 November 2026 that it will buy Smartways from The Riverside Company. Smartways runs more than 350 drivers on time-critical healthcare transport for medical device, pharmaceutical, life science and clinical trial customers. The Australian Financial Review reported an offer of A$600 million (about US$405 million), unconfirmed by UPS; completion is expected in the first half of 2027, subject to approvals.

DISTRIBUTOR IMPLICATION
A global integrator is buying the dedicated courier network that serves medical device customers in Australia and New Zealand, which moves last-mile hospital delivery from an independent supplier to a carrier with its own healthcare logistics offer. That narrows the delivery and reverse-logistics services a distributor can differentiate on in the region.

SOURCE ›

ACQUIRER	TARGET	VALUE
Europa Biosite	MEDISTA	Undisclosed

GEOGRAPHY
Czech Republic

SEGMENT
Diagnostics & laboratory technology

The Swedish life science distributor announced on 18 November 2026 that it will acquire MEDISTA, a Czech distributor of diagnostics and laboratory technology, in its first entry into the Czech market. MEDISTA keeps its name and local team, its CEO Jan Kadlec joins the group leadership team, and closing awaits regulatory approvals. Europa Biosite has said it plans further European acquisitions.

DISTRIBUTOR IMPLICATION
A multi-country life science platform now holds a local Czech diagnostics team and customer base, so independent distributors in that market face a better-funded competitor while manufacturers gain one route across several countries. Keeping the MEDISTA name and management shows the customer relationship is what is being bought.

SOURCE ›

SECTION 03 · KEY M&A & STRATEGIC CONSOLIDATION

Manufacturer & Supplier Activity

ACQUIRER	TARGET	VALUE
KKR	Integer Holdings	€5.1B

GEOGRAPHY
United States

SEGMENT
Medical device contract manufacturing

Integer announced on 17 November 2026 that KKR funds completed their all-cash acquisition at US$127 a share, an enterprise value of about US$5.7 billion (€5.1B at US$1.1225 per euro, ECB 19 Nov 2026). Announced on 3 August after a strategic review, it was approved by shareholders on 21 October. Integer's customers include Abbott, Boston Scientific and Medtronic, and KKR plans to invest in capacity, technology and workforce.

DISTRIBUTOR IMPLICATION
Integer builds devices for Abbott, Boston Scientific and Medtronic, so private equity ownership now sits one step behind several leading OEM product lines. Capacity investment supports supply continuity, while an owner funded with committed debt makes manufacturing cost and pricing discipline more relevant to the OEM portfolios distributors carry.

SOURCE ›

ACQUIRER	TARGET	VALUE
Medtronic	Contego Medical	€338.5M+

GEOGRAPHY
US (FDA-approved product)

SEGMENT
Carotid & peripheral thrombectomy devices

Medtronic announced on 16 November 2026 that it will buy privately held Contego for US$380 million (€338.5M at US$1.1225 per euro) plus potential post-closing payments. The deal adds the FDA-approved Neuroguard IEP Direct System, described as the first transcarotid revascularization system combining flow reversal with integrated embolic protection. It builds on a US distribution agreement signed in January 2025, and closing is expected in Medtronic's fiscal third quarter.

DISTRIBUTOR IMPLICATION
A distribution agreement from January 2025 has become an acquisition within two years, showing how a partner's channel can prove a small manufacturer's product before the partner buys it. Specialist distributors of emerging vascular devices see their position depend on what the acquirer does with existing channels.

SOURCE ›

SECTION 04 · MAJOR MEDTECH NEWS OF THE WEEK

Launches, Deals & Approvals

APPROVALS & ROBOTICS SOURCE ›

Medtronic wins expanded FDA clearance for Hugo in general surgery

- The FDA cleared Hugo for general surgery on 17 November 2026; MedTech Dive reports upper abdominal procedures such as gallbladder removal, gastric bypass and hernia repair, while trade outlets differ on lower abdominal scope.
- The clearance follows Hugo's December 2025 urology clearance, and J&J's Ottava system was authorised for general surgery in July.
- Medtronic says general surgery is the fastest-growing Hugo procedure area outside the US.

DISTRIBUTOR IMPLICATION

A general surgery indication multiplies the procedures one installed robot can serve, which lifts utilisation and the instrument and accessory volumes that follow each system. With Medtronic and J&J both now authorised in general surgery, the choice of platform partner shapes which recurring revenue a regional distributor can reach.

DIABETES TECHNOLOGY SOURCE ›

MiniMed gets FDA clearance for Fit, its first tubeless insulin pump

- The FDA cleared MiniMed Fit for people with type 1 and type 2 diabetes aged 7 and older, reported on 16 November 2026, with up to seven days of wear, a 300-unit insulin cartridge and app control.
- The device includes SmartGuard automation and meal detection; MiniMed plans a phased US launch in spring 2027.
- Tandem's tubeless Mobi supplies were cleared days earlier, and Insulet's Omnipod, with three-day wear, remains the market leader.

DISTRIBUTOR IMPLICATION

A fully disposable seven-day patch moves a larger share of pump revenue into recurring consumables, the stream distributors of diabetes technology are valued on. A third tubeless entrant also widens the range of systems competing for the same patients and payer listings.

DIABETES TECHNOLOGY SOURCE ›

Senseonics and Beta Bionics launch Eversense 365 and iLet integration

- Beta Bionics announced the commercial launch of its iLet Bionic Pancreas integrated with Senseonics' Eversense 365, a year-long implantable CGM, with trade coverage dated 18 November 2026.
- The partnership was announced on 14 September 2026; Eversense 365 was previously integrated with one other pump, Sequel's twist.
- A future integration with Beta Bionics' tubeless Mint patch pump is committed but not part of this launch.

DISTRIBUTOR IMPLICATION

Pairing a year-long implantable sensor with an automated insulin pump turns two products into one system, and interoperability is becoming the basis on which diabetes technology is chosen. That reshapes how distributors of either brand are positioned, since a sensor or pump now competes as part of a combination.

RECALLS & PATIENT SAFETY SOURCE ›

React Health updates Luna G3 BPAP correction (FDA notice, 19 November)

- The company announced an update on 17 November 2026 to its voluntary correction of the Luna G3 BPAP system, model LG3800-30VT, first communicated on 8 October; the FDA published the notice on 19 November.
- The device can report incorrect therapy pressure statistical data when Targeted VT is enabled; about 7,533 units were distributed in the US and Puerto Rico.

DISTRIBUTOR IMPLICATION

The fault concerns reported pressure statistics, yet clinicians and home respiratory providers rely on that data when adjusting ventilation settings. For whoever holds the installed base, the correction becomes a traceability and service task across about 7,500 units in the US and Puerto Rico.

SECTION 05 · UPCOMING CONGRESSES & CONFERENCES

European Events & Priority Segments

DATE	EVENT	LOCATION
JUNE 2026		
~~23–26 Jun~~	~~EAES Congress 2026~~	~~Athens, GR~~
~~27–30 Jun~~	~~EAN Congress 2026~~	~~Geneva, CH~~
AUGUST 2026		
~~28–31 Aug~~	~~ESC Congress 2026~~	~~Munich, DE~~
SEPTEMBER 2026		
~~2–4 Sep~~	~~ESMINT Congress 2026~~	~~Marseille, FR~~
~~5–9 Sep~~	~~CIRSE Congress 2026~~	~~Copenhagen, DK~~
~~18–20 Sep~~	~~ExpoPharm 2026~~	~~Munich, DE~~
~~24–26 Sep~~	~~EAO Congress 2026~~	~~Lisbon, PT~~
~~28 Sep–2 Oct~~	~~EASD Annual Meeting 2026~~	~~Milan, IT~~
~~30 Sep–3 Oct~~	~~EADV Congress 2026~~	~~Vienna, AT~~
OCTOBER 2026		
~~1–3 Oct~~	~~EUSOBI Annual Meeting 2026~~	~~Maastricht, NL~~
~~6–9 Oct~~	~~ICS Annual Meeting 2026~~	~~Maastricht, NL~~
~~7–9 Oct~~	~~EUROSPINE 2026~~	~~Gothenburg, SE~~
~~7–10 Oct~~	~~EACTS Annual Meeting 2026~~	~~Barcelona, ES~~
~~8–11 Oct~~	~~JFR 2026~~	~~Paris, FR~~
~~14–17 Oct~~	~~NASS 41st Annual Meeting~~	~~San Antonio, USA~~
~~26–30 Oct~~	~~IASP 2026 World Congress on Pain~~	~~Bangkok, TH~~
NOVEMBER 2026		
~~4–6 Nov~~	~~ESSO 45~~	~~Madrid, ES~~
~~11–14 Nov~~	~~SIU Congress 2026~~	~~Florence, IT~~
DECEMBER 2026		
29 Nov–3 Dec	**RSNA Annual Meeting 2026**	Chicago, USA
MARCH 2027		
3–7 Mar	**ECR 2027**	Vienna, AT
19–22 Mar	**EAU27, 42nd Annual EAU Congress**	Amsterdam, NL
GLOBAL INDUSTRY EVENTS		
~~17–19 Jun 2026~~	~~World Health Expo Miami 2026 (WHX)~~	~~Miami, USA~~
~~9–11 Sep 2026~~	~~Medical Fair Asia 2026~~	~~Singapore, SG~~
~~16–19 Nov 2026~~	~~MEDICA 2026~~	~~Düsseldorf, DE~~
25–28 Jan 2027	**World Health Expo Dubai 2027 (WHX)**	Dubai, UAE

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