

ABHI



cpi

**PULSE OF THE SECTOR:
2025 BUSINESS SURVEY**

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EXECUTIVE SUMMARY

Our 2024 survey highlighted regulatory uncertainty and the complexity of NHS procurement as significant barriers to the adoption of HealthTech innovation, challenges further compounded by the rising cost of doing business in the UK. Since then, Life Sciences has been identified as one of the eight high-growth sectors in [the UK's Industrial Strategy](#), leading to the publication of the [Life Sciences Sector Plan](#). This also coincided with the release of the NHS 10 Year Health Plan.

The sector has welcomed these publications and the clear recognition that HealthTech will be fundamental to delivering the three core shifts at the heart of the 10 Year Health Plan: from analogue to digital, hospital to community, and sickness to prevention. However, this optimism is tempered by persistent operational and structural challenges that must be addressed if these ambitions are to translate into meaningful impact for patients, the NHS, and the wider economy.

The 2025 survey revealed a decline in confidence in the UK's ability to adopt innovation at pace and scale, provide a supportive manufacturing environment, and deliver a regulatory system that enables innovation. The US continues to be viewed as the most favourable jurisdiction for fostering innovation and bridging the "valley of death" for growing companies.

More encouragingly, the UK retains its global lead in research excellence, and investment sentiment remains broadly positive. However, without tangible improvements in regulatory performance and support for scale-up, there is a growing risk that HealthTech innovation developed in the UK will be commercialised and adopted elsewhere.

Regulatory capacity challenges persist. Over half of respondents believe capacity has worsened, and more than 60% anticipate delays to the introduction of innovative products into Great Britain. Three in ten companies report having removed products from the UK market, with some citing portfolio reductions of more than 20%, presenting an ongoing risk to supply continuity. While views on the current regulatory arrangements remain mixed, sentiment about the future is more positive. There is growing confidence that the

UK is moving towards a best-in-class regulatory system, driven by improved engagement from the MHRA and the prospect of international recognition and reliance routes to market. These developments are viewed by industry as the single most impactful government-led initiative to enhance the UK's attractiveness as a destination for HealthTech innovation.

However, nearly two thirds of responses indicate that the NHS Net Zero Roadmap is negatively impacting the UK's attractiveness as a place to do business. The cost of transitioning towards Net Zero represents a significant burden, with sustainability cited as one of the largest areas of cost increase. Over 55% of companies report sustainability-related costs rising by between 11-50% or by more than 50% in the past 12 months.

A lack of resources and specialist expertise remains a major barrier, particularly for SMEs, when undertaking Scope 3 reporting and lifecycle assessments. Despite these challenges, ambition across the sector remains strong. Eighty-six per cent of respondents believe they can achieve Net Zero by 2050, and companies continue to invest significantly in reducing carbon emissions. This commitment, despite the scale and cost of the challenge, underlines the importance of future requirements being implemented in a proportionate way, supported by appropriate timelines and practical guidance.

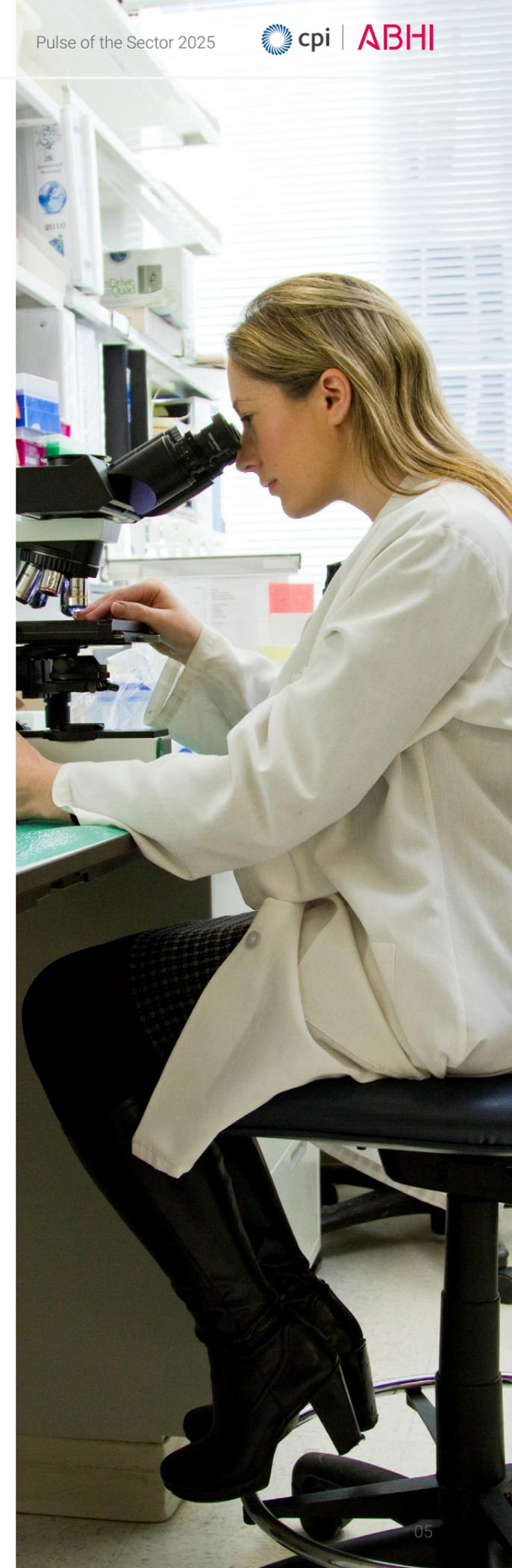
Procurement and technology assessment initiatives elicited varying responses, with Early Value Assessments regarded as the third most promising initiative, but Late Stage Assessments, now known as Existing Use Guidance, attracting criticism, with around one in five respondents suggesting a considerable negative impact on UK attractiveness. Alongside this, other related proposals have high 'not sure' of impact ratings. This suggests that there should be greater communication to improve awareness of government initiatives. There is also strong demand for funding to enable pathway transformation and create a clearer, more transparent process for integrating new technologies into clinical care.

A further area of concern is workforce availability, with 45% of companies reporting difficulties in recruiting staff. This challenge is particularly acute in the manufacturing sector, which has been further impacted by rising fuel, labour, and freight costs. Together, these staffing and cost pressures are constraining manufacturing investment in the UK, which has seen the most pronounced decline, compared with 2024, in the proportion of companies planning to increase or maintain investment. Respondents highlighted the need for targeted investment in digital skills to support a future-ready manufacturing workforce, alongside the development of dedicated scale-up facilities to strengthen the UK's position as a competitive base for HealthTech manufacturing.

Digital transformation and AI adoption are accelerating, with two-thirds of companies planning to incorporate AI into their technologies. However, confidence in reimbursement and regulatory readiness is low, with respondents pointing to the US and Germany's Digital Health Applications (DiGA) model as leading examples of structured pathways for digital health.

Priority export markets remain dominated by the US, and international accelerators and trade missions are seen as the most beneficial elements of support, with ABHI's activity in the area recognised as a key enabler for growth in overseas markets.

The 2025 survey underscores both the scale of the opportunity and the urgency for action. Whilst industry enthusiasm for regulatory reform and innovation initiatives remains strong, without decisive progress on regulatory capacity, procurement complexity, and sustainability challenges, the UK risks losing ground as a global hub for HealthTech. Delivering on the commitments set out in the Life Sciences Sector Plan and the NHS 10-Year Health Plan will be critical to unlocking the full potential of HealthTech to improve both the health of patients and the economic prosperity of the UK.





THE UK HEALTHTECH SECTOR

HealthTech plays a key role in supporting the delivery of healthcare and is a significant contributor to the UK's economic growth. It is the largest employer in the broader life sciences sector, employing around 196,000 people in 4,360 companies, with a [combined turnover of £48bn](#).

The potential that HealthTech offers the UK is vast and is underpinned by strong alignment with national priorities. Technologies such as AI, quantum sensing, 3D printing, robotics and engineering biology are increasingly finding transformative applications in healthcare, driving advances in prevention, earlier and more accurate diagnosis, and precision treatments. These frontier technologies sit at the heart of the UK Industrial Strategy and the Life Sciences Sector Plan, which prioritise innovation-led growth, data-driven healthcare, and advanced manufacturing to strengthen the UK's global competitiveness.

At the same time, more established HealthTech, from medical devices to diagnostics, continues to enable high-quality, cost-effective care for millions of NHS patients every day. Optimising their use and integration across the health system is essential to realising the ambitions of the NHS 10-Year Health Plan, which seeks to deliver earlier diagnosis and prevention of disease, digitally enabled care, and a shift from hospital to community care to tackle major challenges such as the elective backlog and workforce pressures.

With the right policy support, data infrastructure and manufacturing investment, HealthTech can also be a powerful driver of sustainable economic growth. HealthTech represents [31% of all turnover in the UK life sciences sector](#), and through continued innovation and stronger system adoption, it can play a pivotal role in delivering the UK Government's mission to grow the economy, improve population health and build a resilient, innovation-driven healthcare ecosystem.

Against this backdrop, and considering the UK's scientific excellence, NHS testbed potential and supportive industrial policy, companies were asked to identify the most attractive location out of the UK, USA, EU and, for the first time in this annual survey, the Middle East, when evaluating innovation environment, market access, and long-term growth potential.

Most Attractive Geographies

Please select the MOST attractive market (geography) for each of these statements.

Figure 1
Collaboration between the health system and industry

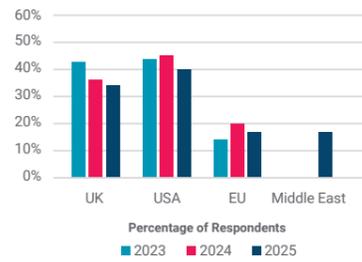


Figure 2
A research friendly environment

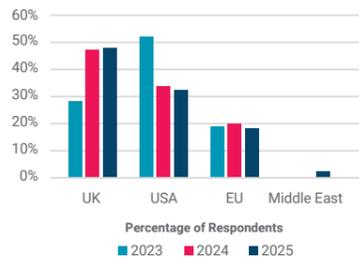


Figure 3
Ability to evaluate technologies for their effectiveness and value for money

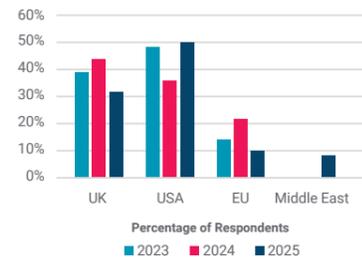


Figure 7
A supportive place to grow a business

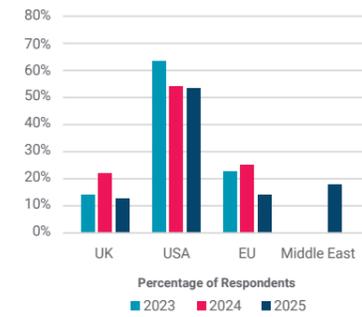


Figure 8
A supportive manufacturing environment

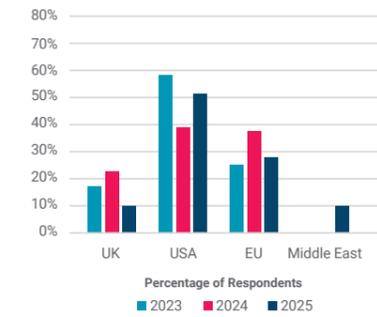


Figure 4
The cost of doing business

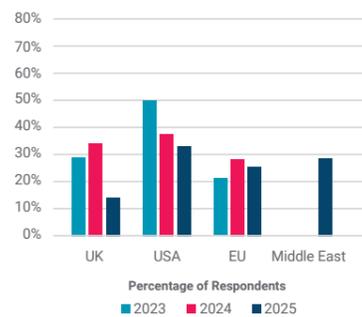


Figure 5
A regulatory environment that supports innovation

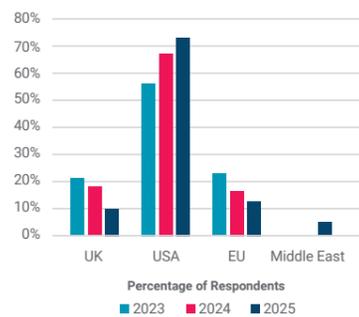


Figure 6
A regulatory environment that encourages business investment

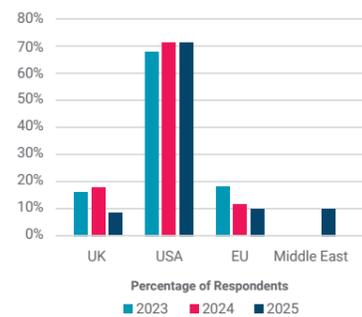


Figure 9
Ability to adopt innovation at pace and scale

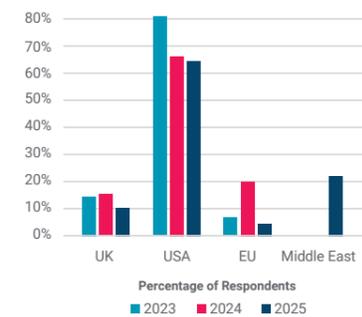
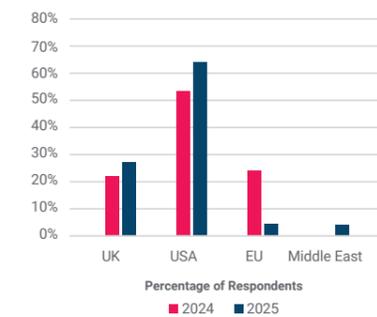
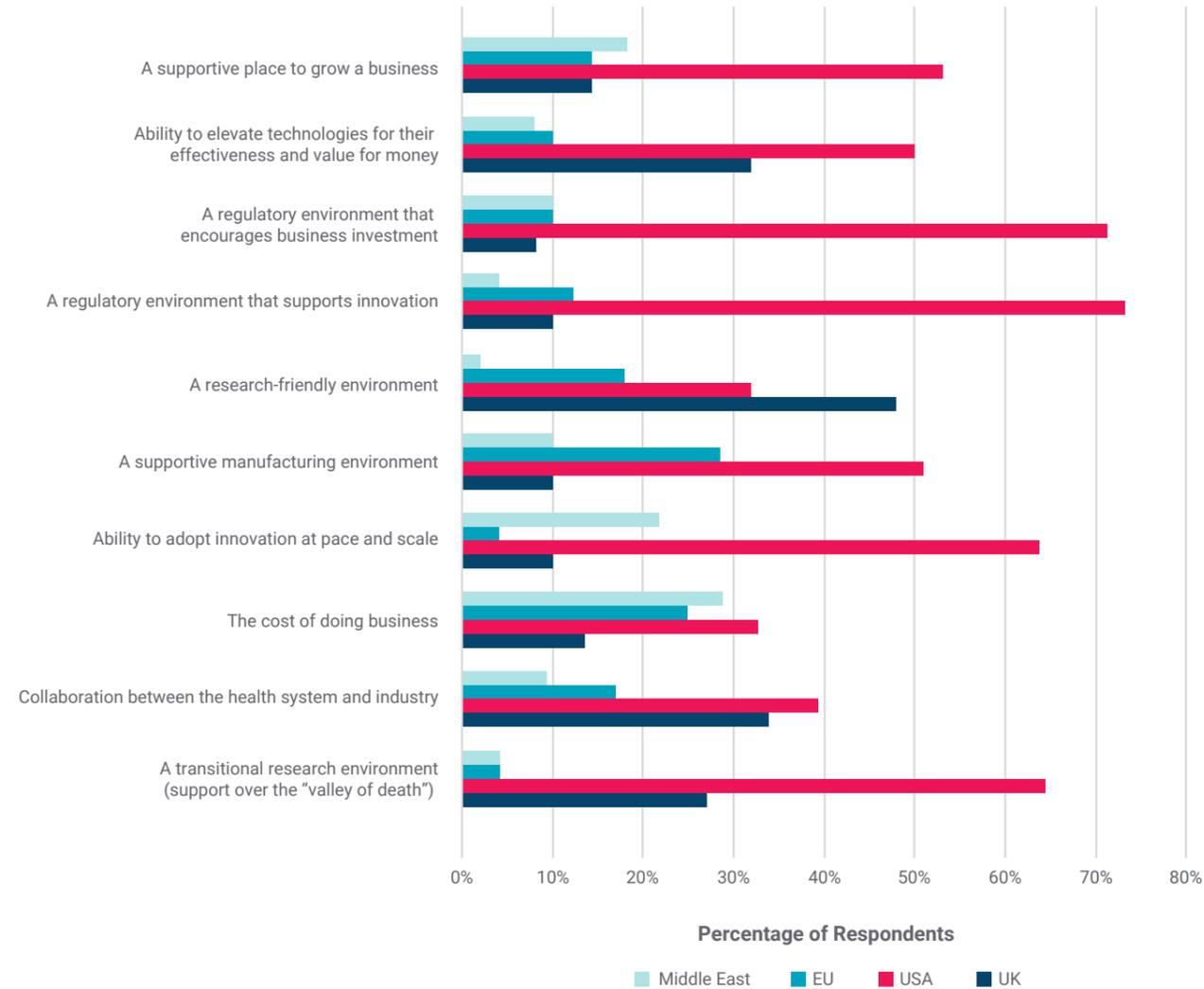


Figure 10
A translational research environment (support over the "valley of death")



Please select the MOST attractive market (geography) for each of these statements (2025 data only)

Figure 11



The HealthTech sector continues to favour the US market, which receives consistently positive feedback across almost all areas, particularly in its ability to provide strong support for companies navigating the 'valley of death', its clear and enabling regulatory framework, and the speed with which innovations progress from FDA clearance to reimbursement.

Positively, the UK retains its strong reputation for research excellence underpinned by world-class universities and globally renowned institutions such as the National Institute for Health Research (NIHR). However, the sector holds the UK in low regards in its ability to adopt innovation at pace and scale due to the fragmented nature of NHS adoption and complex

procurement processes. In both the UK and EU, perceptions of a regulatory environment that encourages business investment and supports innovation is declining, highlighting lingering post-Brexit regulatory uncertainty, meanwhile the US continues to widen its lead. The EU has fallen behind in companies' perceptions of market attractiveness as a translational research environment, with both the UK and US strengthening their positions in this respect.

There is strong indication that the Middle East is emerging as an increasingly agile and innovation-friendly region, benefiting from rising investment in HealthTech, although issues around scale and infrastructure remain ongoing challenges.

Investment in The UK

For those whom it is applicable, are you considering increasing, maintaining or reducing the investment in the UK under the following categories?

Figure 12

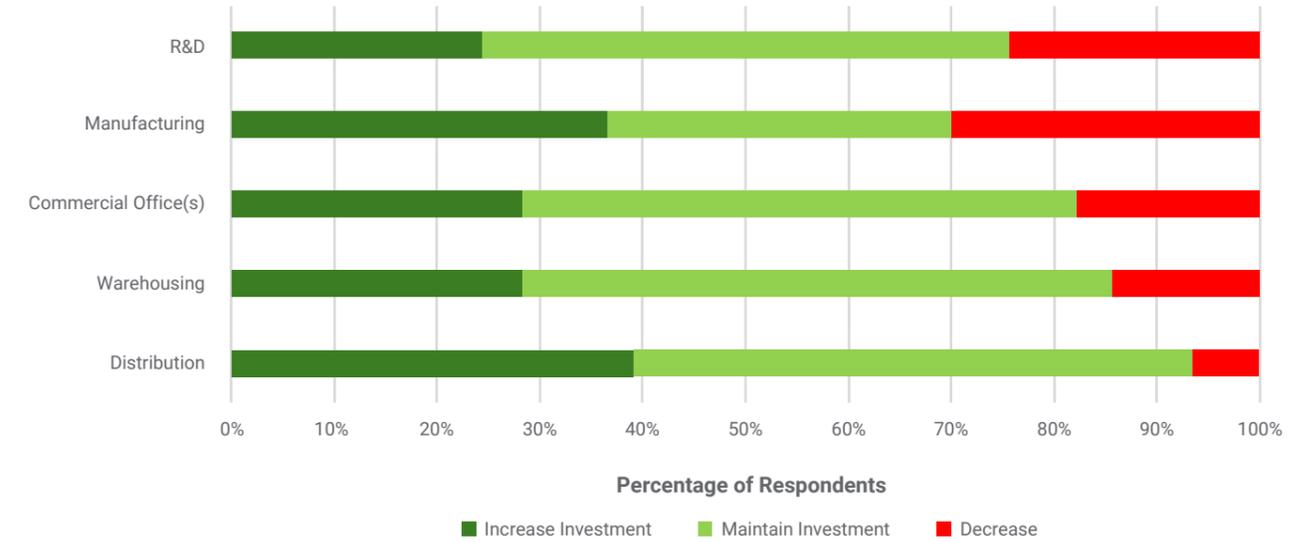


Figure 13

Research and Development

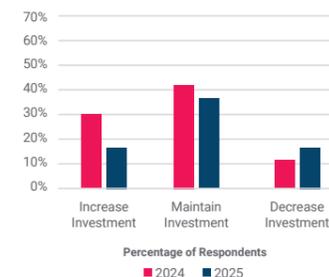


Figure 14

Manufacturing

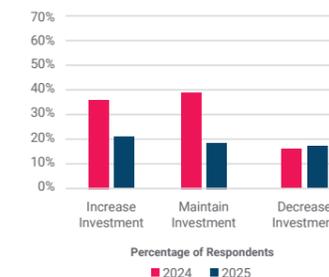


Figure 15

Commercial Office(s)

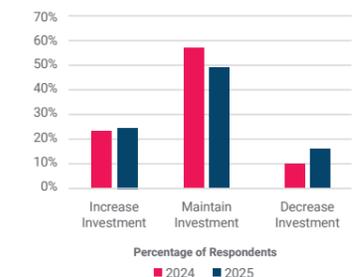


Figure 16

Warehousing

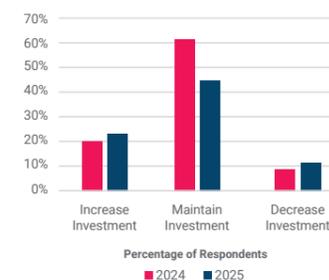
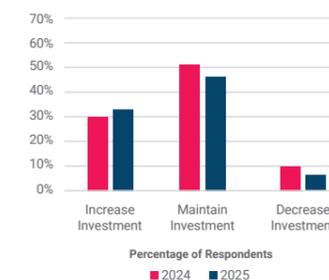


Figure 17

Distribution



Investment intentions for the sector remain relatively positive, with most companies planning to increase or maintain spending across all categories shown in Figure 12. The strongest expectations relate to distribution, which sees the most promising investment trajectory. There are, however, emerging signs of caution for R&D and manufacturing, with manufacturing showing the most pronounced decline in the proportion of companies planning to increase or maintain investment compared to 2024. This reflects ongoing uncertainty around the UK's competitiveness for production and innovation, despite policy efforts to strengthen life sciences manufacturing. Commercial office investment also appears to be softening, likely influenced by cost pressures and organisational restructuring. Taken together, the data suggests a sector prioritising operational resilience over expansion, with incremental gains in logistics offset by retrenchment in core innovation and manufacturing capabilities.

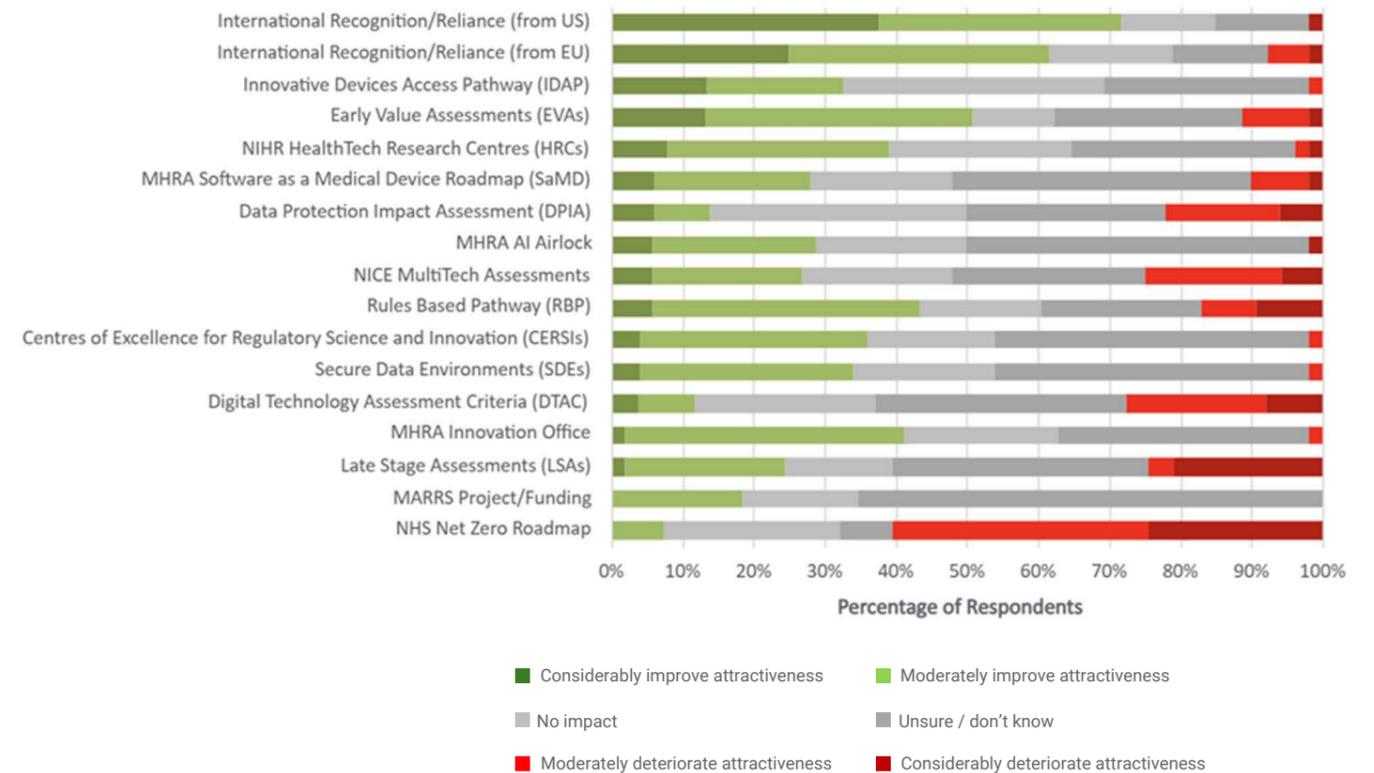
If these patterns persist, the UK risks eroding its position as a global hub for HealthTech innovation and manufacturing. Reduced investment in R&D could worsen the country's ability to translate research into commercial success, while declining manufacturing commitments may push production offshore, diminishing supply chain resilience. Although the UK retains strengths in evaluation and clinical research, the disconnect between these capabilities and market access could limit returns on innovation. Without targeted measures to reverse these trends, the UK may become increasingly dependent on its reputation for research rather than its ability to scale and commercialise technologies, leaving it vulnerable in a highly competitive global market.



Initiatives

The UK has implemented a number of initiatives related to our sector. How do you think the following initiatives are affecting the attractiveness of the UK as a HealthTech market?

Figure 18



Ongoing and planned HealthTech initiatives continue to shape the UK's innovation landscape, though their overall impact on sector attractiveness remains mixed. As shown in Figure 18, International Recognition (IR) and reliance mechanisms, from the US and EU, remain the top priority. More than 60% of respondents believe such arrangements would enhance the UK's attractiveness, with around a third indicating they would deliver a considerable improvement.

Several other initiatives also performed positively. The Early Value Assessments (EVAs), MHRA Innovation Office, NIHR HealthTech Research Centres (HRCs), Centres of Excellence for Regulatory Science and Innovation (CERSIs), and Rules-Based Pathway (RBP) are all viewed favourably, each cited by around half of respondents as improving the environment for innovation and regulatory alignment.

In contrast, the NHS Net Zero Supplier Roadmap remains the most negatively rated, with more than 60% of companies believing it harms UK attractiveness, twice as many as any other initiative.

Late-Stage Assessments (LSAs) also perform poorly, with around one in five suggesting a considerable negative impact.

Several initiatives, including the Data Protection Impact Assessment (DPIA), Innovative Devices Access Pathway (IDAP) and Digital Technology Assessment Criteria (DTAC), register high "no impact" responses, suggesting low awareness or limited reach. Greater communication and coordination are needed to ensure companies understand the benefits and implications of these programmes.

Overall, the findings point to steady progress in regulatory innovation and international alignment, but also underline persistent gaps in awareness, confidence and implementation that continue to influence how companies perceive the UK's competitiveness. Expanding positively rated initiatives, particularly IR, EVAs and MHRA-led frameworks, would further strengthen the UK's HealthTech competitiveness.



RESEARCH, DEVELOPMENT AND RECENT SECTOR PUBLICATIONS

The UK continues to have a strong R&D base in HealthTech with around 4,360 companies that operate in the sector and 50 universities that lead research in the area. The sector contributed the [largest number of university spin outs](#) with 520 reported as of 2025 followed by Pharmaceuticals with 399. Across Europe in 2024, medical technology accounted for the [fourth highest number of patent applications](#), exceeding 15,700, compared with around 8,400 in pharmaceuticals.

Over the past year, two landmark policy documents: The [NHS 10-Year Health Plan](#) and the [Life Sciences Sector Plan](#) have set a clear strategic direction for the UK health and life-sciences ecosystem. The NHS 10-Year Health Plan outlines how the health and social-care system will evolve over the next decade, emphasising prevention, digital-enabled care, and earlier diagnosis. Meanwhile, the Life Sciences Sector Plan positions the UK as a global destination for innovation, manufacturing and commercialisation in HealthTech, calling for stronger links between emerging technologies, regulatory reform and system adoption. Together, these publications provide a renewed policy foundation for companies, investors and institutions operating in the HealthTech sector, signalling both significant opportunity and a pressing need for agility, compliance and strategic alignment.

Clinical Areas with Greatest Potential

The UK has led significantly over the US and EU for the past two years for having a research-friendly environment, see Figure 2. The sector has a large potential to generate innovation that addresses the priorities of the UK's health and care system. The sector was asked which clinical areas it could contribute the most to. There was strong potential for chronic and long-term conditions, including diabetes, obesity, cardiometabolic diseases and orthopaedic related conditions. These represent high-cost, high-volume pressures on the health system, where HealthTech innovations are well placed to scale solutions more effectively than traditional care models. The shift towards preventative and precision medicine has led to genomics capturing significant attention, attracting investment and is an area where HealthTech can drive meaningful progress.

With a focus on under-served populations in the NHS 10-Year Health Plan, the industry also highlighted Women's Health as an area that requires significantly greater attention. Many respondents noted that current pathways and outcomes for women remain uneven, and that HealthTech has an important role to play in improving access, experience and equity. ABHI is committed to supporting these goals. Earlier this year, we published our action plan [Women's Health: Time to Listen. Time to Act.](#) which sets out clear priorities for addressing gaps in care, strengthening data and evidence, and accelerating innovation that meets the needs of women throughout their lives.

10 Year Health Plan

Across the sector, there is strong recognition that the NHS 10-Year Health Plan represents a significant opportunity to align innovation with system priorities, with HealthTech companies well placed to play a role in delivering the three major shifts at the Plan's core and supporting long-term system sustainability. The shift from sickness to prevention creates clear demand for diagnostics, genomics, and precision medicine, with businesses able to accelerate early detection through advanced screening and risk stratification tools. Moving care closer to patients will require scalable solutions for community diagnostics, self-management tools, and home-based therapies, opening the door for Point of Care technologies, wearables, and remote monitoring platforms. Digital transformation is another critical enabler, and companies can support this by embedding AI into clinical pathways, ensuring interoperability, and automation to improve operational efficiency. Financial reform and multi-year planning will depend on suppliers demonstrating value-based outcomes and supporting procurement models that prioritise efficiency and long-term impact. Finally, innovation adoption and robust data governance will be essential, companies can contribute by working collaboratively with system actors to streamline procurement processes, accelerate clinical trials, and enable secure, real-world data sharing across the patient pathway. Collectively, these actions position industry as a key partner in delivering a more predictive, connected and sustainable health system. However, the sector has highlighted several areas where further support is needed, including better data sharing, clearer digital governance, passporting for proven technologies, and improved integration across NHS systems.

Life Sciences Sector Plan

The industry was asked which initiatives in the Life Sciences Sector Plan are most attractive to their company. The most frequently mentioned response was regulatory reform, with critical enablers including faster approvals, simplified pathways, and greater international reliance. Companies cited the potential of the Innovator Passport, and Rules-Based Pathway, as particularly impactful in accelerating adoption. Procurement reform also featured strongly, with respondents calling for low-friction processes, value-based purchasing, and clearer commercial pathways to reduce barriers to market entry.

Of particular relevance for SMEs was manufacturing investment, which is discussed in greater depth in the Manufacturing section. This is due to the rising costs of doing business, driven by significant inflation of energy and labour costs, see figure 30.

Sector insights highlighted collaboration will be critical to the success of the Life Sciences Sector Plan, with industry, academia, and NHS partnerships seen as essential for scaling innovation and ensuring alignment with system needs.



REGULATION

The sovereign UK HealthTech regulatory system continues to offer a generational opportunity to drive growth in a sector that supports improved patient outcomes, greater system efficiency and the move towards more sustainable models of care. A stable and innovation friendly framework has the potential to unlock major benefits for the health and care system, clinicians, patients and the wider economy, strengthening HealthTech's role as a core enabler of the 2025 Life Sciences Sector Plan and the UK Industrial Strategy.

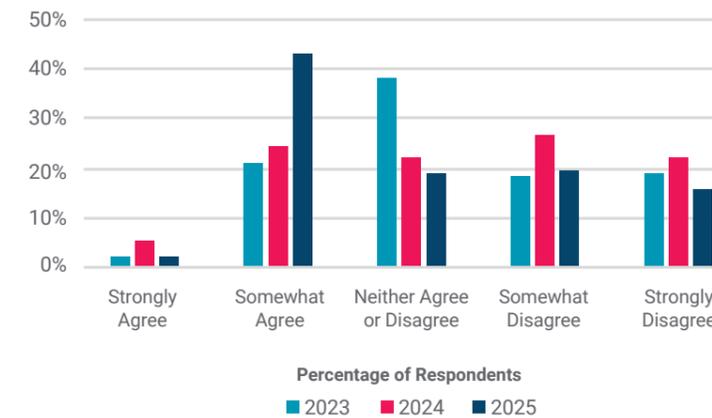
The Sector Plan highlights HealthTech as central to achieving goals of strengthening UK manufacturing, improving NHS productivity, and accelerating the adoption of data-driven, digitally enabled care. However, the UK's regulatory transition remains a concern for many companies. Whilst progress has been made through the MHRA Innovation Office, Software as a Medical Device (SaMD) Roadmap, and early moves toward international recognition and reliance pathways, gaps in alignment still create complexity and additional cost.

Meanwhile, continuing challenges within the EU MDR framework underscore the importance of ensuring the UK's system remains proportionate, agile, and internationally interoperable. If managed effectively, the UK can establish a world-leading regulatory environment, one that combines patient safety, innovation, and global credibility to strengthen its position as a preferred destination for HealthTech development, investment, and manufacturing.

Best In-Class Regulatory Regime

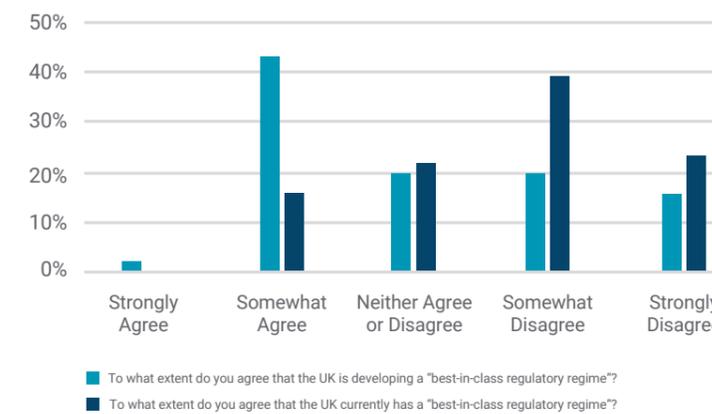
To what extent do you agree the UK is developing a best-in class regulatory regime?

Figure 19



Comparison of the industry's views on how the UK is developing (future outline) and currently has (current system) a best-in-class regulatory regime

Figure 20



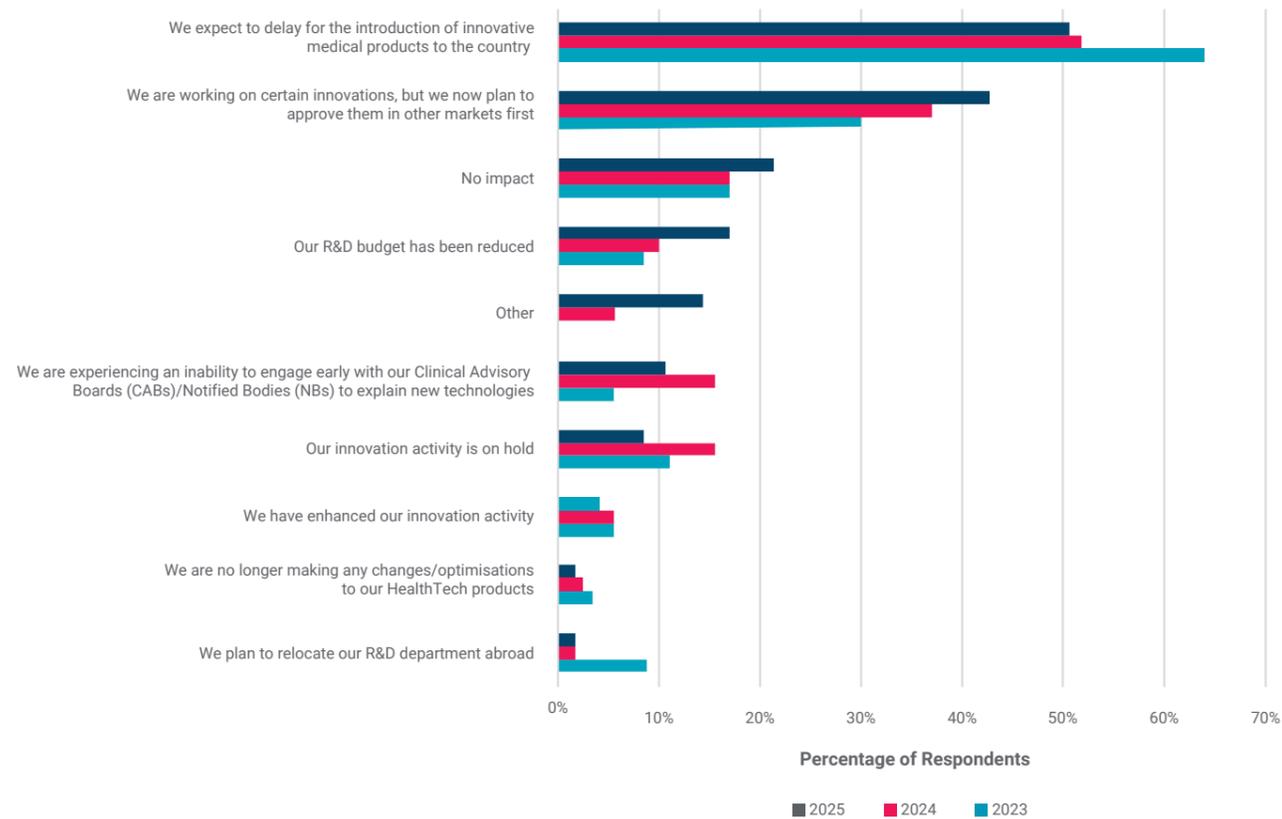
It appears that there is an optimistic outlook amongst the sector as to the UK's ability to develop a best-in-class regulatory regime, despite unfavourable perceptions of its current status. Whilst most industry respondents do not yet consider the UK to have a best-in-class framework, with a significant proportion continuing to express disagreement and concerns around complexity and pace, the industry was notably more positive when asked whether the UK is building towards such a regime. Many respondents cited recent

initiatives and engagement from regulators as encouraging signs, particularly the improved communication by the MHRA of plans and ongoing progress over the past year, including updated post-market surveillance regulations to strengthen patient safety and enable faster access to innovative technologies. This result is a positive outcome for the sector, demonstrating confidence in the UK's ambition to create a world-leading regulatory environment is growing, even if tangible improvements have yet to fully materialise.

Regulatory Uncertainty

Recent years have seen a period of change and uncertainty in the UK regulatory environment. Has this impacted your innovation activity in the UK in the period since?

Figure 21



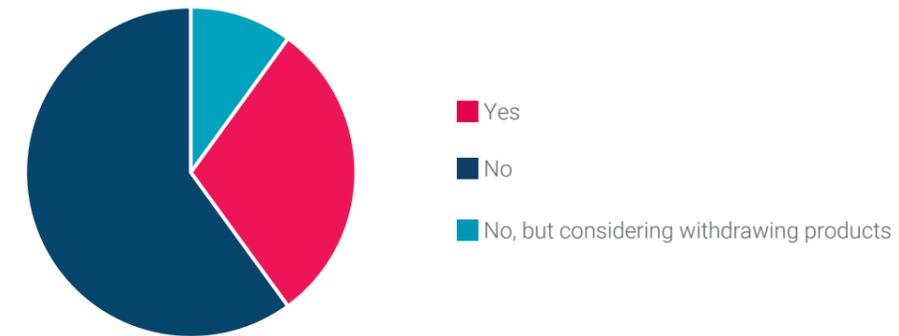
Despite the evidenced optimism for the future, currently HealthTech companies still face challenges to their innovation activity as a result of regulatory uncertainty. Delays to product introduction remain the most frequently cited impact, with around 60% of companies in 2025 expecting to postpone the launch of innovative products. Similarly, over 40% report planning to seek initial approvals in other markets, such as the US or EU, before entering the UK. This sustained pattern indicates ongoing concerns around regulatory predictability, approval timelines, and market readiness.

Encouragingly, fewer companies now indicate plans to relocate their R&D operations abroad, suggesting the UK's regulatory direction and life sciences policy (including the Life Sciences Sector Plan) may be helping to stabilise sentiment. Nonetheless, the high proportion of companies prioritising non-UK approvals demonstrates that the UK has further to go in ensuring its system is internationally competitive and commercially attractive for HealthTech innovators.

Maintenance of Product Portfolio

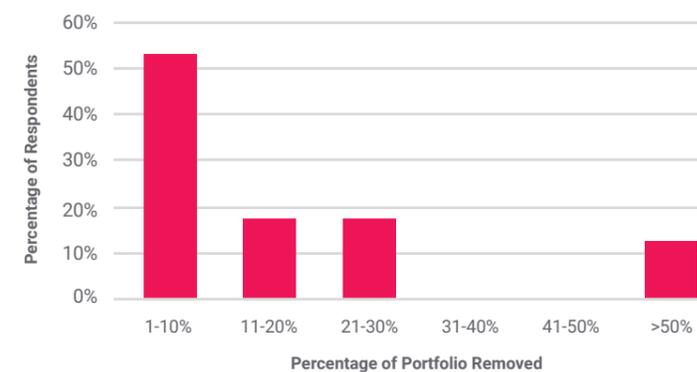
Have you taken any products off the market as a result of this uncertainty?

Figure 22



Those who answered yes were asked, how much of their portfolio has been removed?

Figure 23



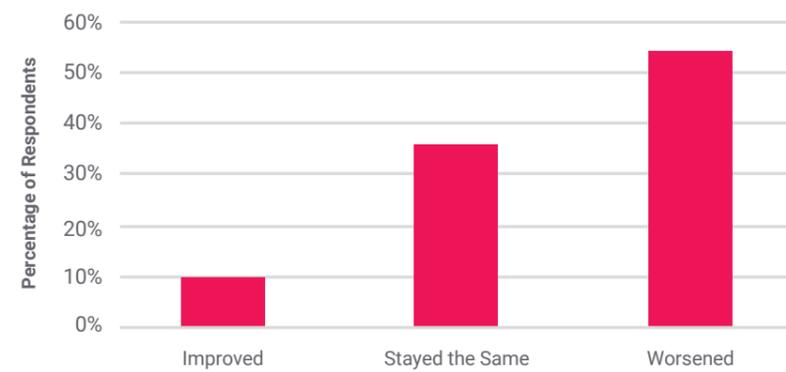
Owing to ongoing uncertainty, 30% of companies reported removing products from the UK market, while a further 10% are considering withdrawals. For those that have acted, around half of those reported removing between 1-10% of their portfolio. Most worryingly, a small majority, around 10% of companies, said they had removed over half of their products from the market, representing an ongoing risk to supply continuity. Whilst this represents a slight improvement compared to previous years, the underlying challenges remain significant.

Respondents continue to cite regulatory complexity, cost pressures and capacity constraints as key factors influencing their decisions. ABHI believes that, subject to consultation, proposals to indefinitely recognise CE marking, along with the MHRA's stated intention to recognise approvals from other jurisdictions, are positive steps. Despite the somewhat recovering confidence in the UK regulatory environment, companies continue to rationalise portfolios and delay innovation launches, limiting patient access, reinforcing the need for accelerated delivery of the reforms already promised.

Capacity in the Regulatory System

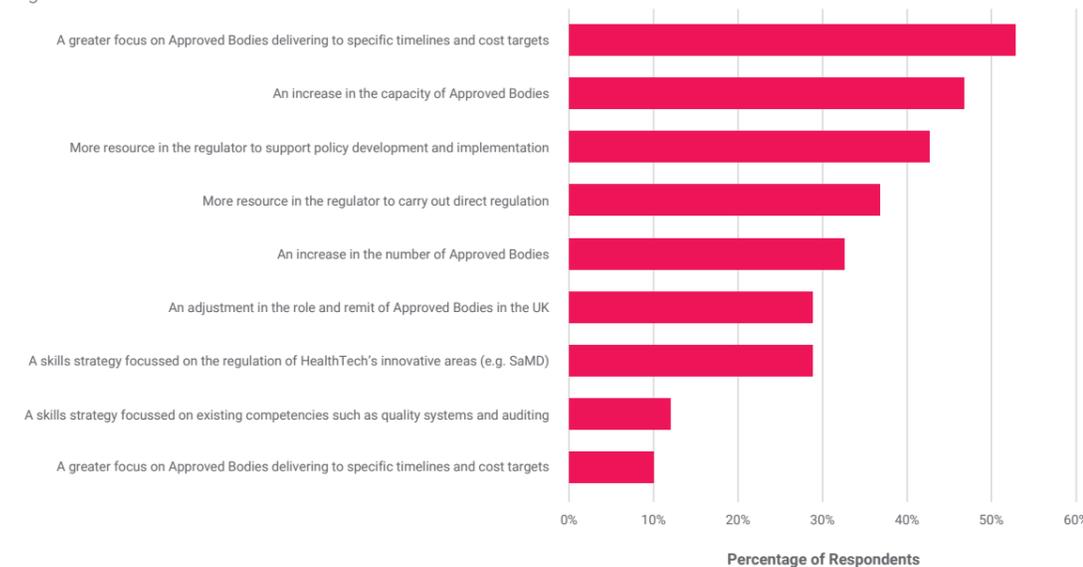
In recent years, has the regulatory capacity in the UK (for example, the capacity of CABs, NBs, or the MHRA) improved, stayed the same, or worsened?

Figure 24



How would you like to see the capacity in the regulatory system addressed?

Figure 25

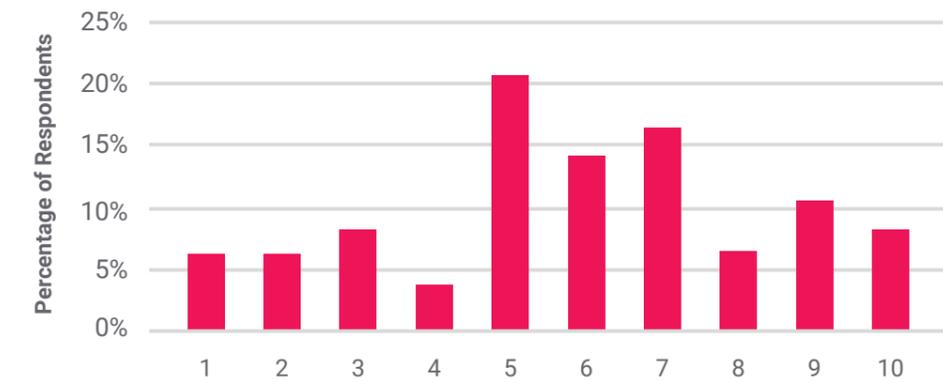


The capacity of the regulatory system has been a persistent challenge for many years, with more than half of the sector believing that capacity in the UK has worsened. Similarly to the [2024 Pulse of the Sector survey](#), the industry emphasised the need for a stronger focus on Approved Bodies delivering clear timelines and cost targets, alongside the perception that an overall increase in their capacity would be greatly beneficial. Improving the performance of Approved Bodies, strengthening their communication and efficiency, would help reduce uncertainty and costs experienced by companies.

International Recognition

On a scale of 1-10, with 10 being the most attractive, how attractive is the proposed international recognition framework to your organisation?

Figure 26



The industry views the International Recognition framework as the top priority for strengthening the UK's market attractiveness and global competitiveness. Among all government-led initiatives, international recognition and reliance mechanisms are regarded as the most impactful, see Figure 18. International recognition / reliance is critical for reducing duplication, accelerating approvals, and ensuring patients gain timely access to life-saving technologies.

The sector remains positive about the progress made in 2025, with the MHRA confirming the implementation of three international reliance routes for devices approved in Australia, Canada, and the US. This marks a significant shift

from concept to delivery, enabling manufacturers to leverage approvals from trusted regulators and shorten time-to-market for innovative products. Additionally, eligibility was expanded to include software as a medical device (SaMD) and higher-risk implantable devices cleared under the US 510(k) pathway. These developments signal a clear commitment to global harmonisation and reducing regulatory burden. However, amongst the sector some concerns persist around operational details and timelines for full implementation, which will be critical to unlocking the framework's potential to enhance UK competitiveness.

The Development of UKCA

The industry was asked what they would like to see built into the UK's offer for innovation through the UK Conformity Assessment (UKCA) mark that may increase UK attractiveness. Respondents highlighted that international 'mutual' recognition of UKCA is needed so that investment the UK regulatory system is worthwhile, and this could occur by alignment of UKCA with CE, FDA, and approvals from other, trusted jurisdictions, to ensure UKCA marked products are competitive globally.

With a growing use of products using AI, see Figure 33, companies highlighted a need for this to be considered. There were suggestions of a digital-first submission process to streamline processes with status tracking built in to improve transparency of timelines. Respondents also suggested integrating UKCA approvals with NHS procurement and adoption pathways, increasing the speed innovative products reach patients.



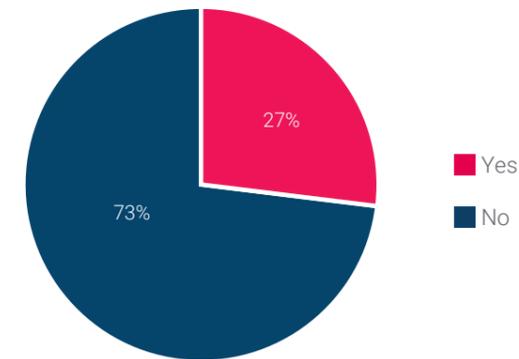
PROCUREMENT

The industry continues to struggle with NHS procurement, and the NHS struggles to adopt HealthTech at scale and with pace. Current systems still favour unit price and in-year savings, as opposed to the total value achieved across clinical pathways, however recent elements within the 10 Year Health Plan do indicate a shift towards value-based procurement which will hopefully support better adoption of innovation in the future.

Procurement Requirements

Have the NHS procurement requirements resulted in you choosing not to bid a tender?

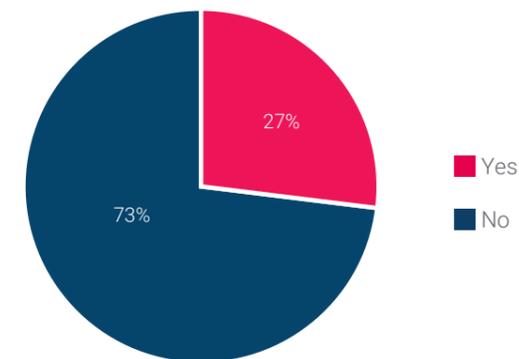
Figure 27



Products Removed

Have you had to remove any products from sale to the NHS due to your selling price being below cost price?

Figure 28



While policy shifts towards value-based procurement, the current picture from HealthTech companies' viewpoints still remains blurred as to the way forward for procurement with numbers remaining similar to 2024. 27% of companies have chosen not to bid on tender due to current NHS procurement requirements, with exactly the same number opting to remove products from sale as a result of below cost selling prices. The industry highlighted that low funding levels and expectations for prices well below the true cost of delivering products make bids financially unviable. This has a disproportionately negative effect on SMEs, due to extensive reporting requirements and criteria that are too narrow for many smaller companies to meet.

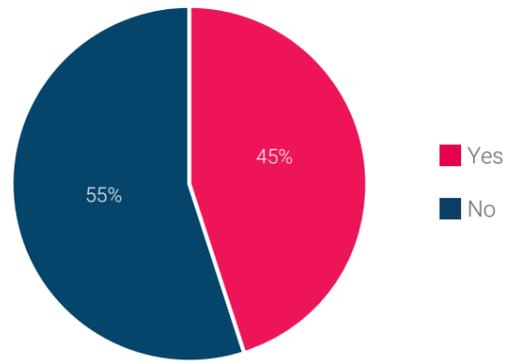
There are a number of initiatives aiming to tackle these challenges, with varying levels of industry views. The Early Value Assessments (EVAs) initiative is highly regarded, ranking as the third most important government initiative to increase the UK's attractiveness. Expanding EVAs would accelerate adoption of innovative technologies by providing earlier clarity on clinical and economic value, reducing uncertainty for manufacturers and supporting faster NHS uptake. Despite the positive sentiment the sector holds for EVAs, unfortunately, Late-Stage Assessments (LSAs), now known as Existing Use Guidance, perform poorly, with around one in five respondents suggesting a considerable negative impact. This is likely to be due to resource burden LSAs introduce late in the process, with seemingly limited benefit to patient or the innovators.

One factor highlighted by the survey is that communication of initiatives is essential. 70% of the sector are unsure what the Innovative Devices Access Pathway (IDAP) is or the impact it has. A primary goal of the IDAP is to facilitate and accelerate adoption of innovative medical technology into the NHS for patients therefore, increasing awareness and providing clear guidance on eligibility and process will be critical to achieving its intended benefits.

Challenges in Recruitment

Have you experienced any challenges with recruiting staff?

Figure 29

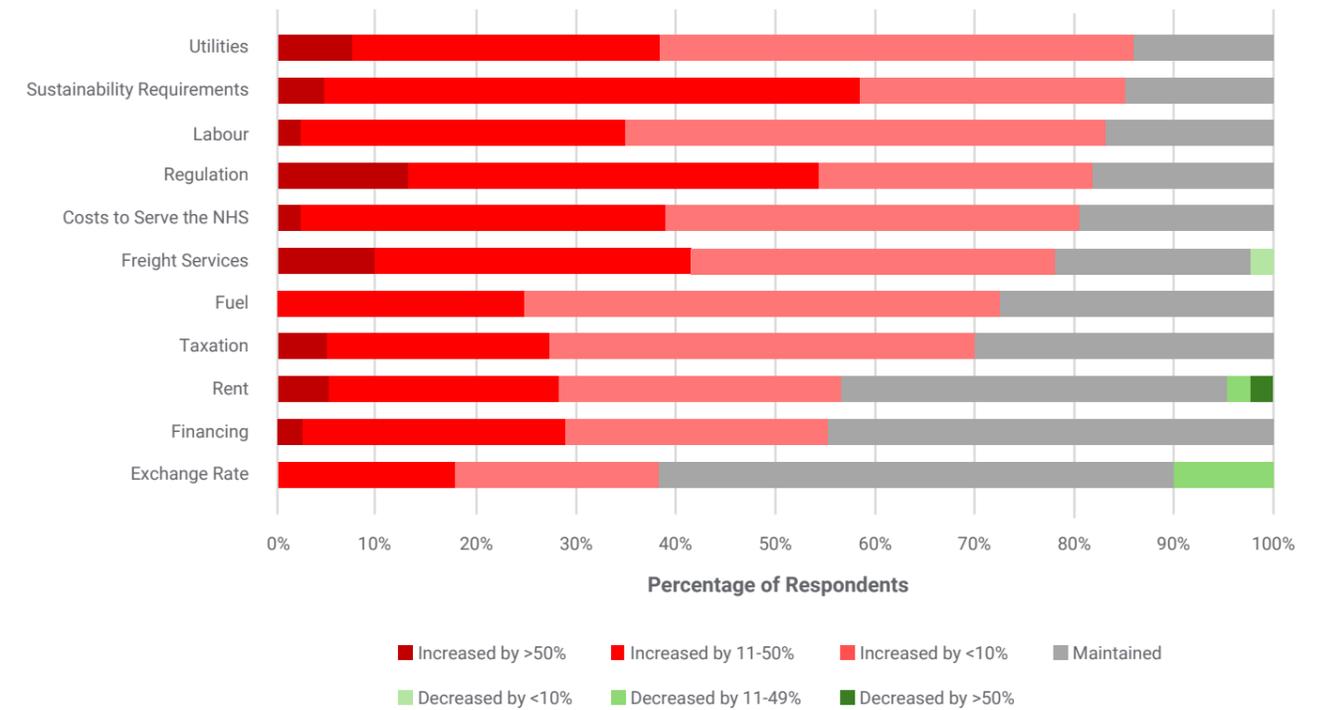


The industry commented on a wide range of roles that they considered difficult to recruit staff for, the most predominant answer being commercial roles and specialist sales staff. Specialist roles in regulatory affairs, compliance and quality assurance also proved difficult to recruit. Along with procurement and tender specialists, which is driving up salaries in these areas above the national average of increase. The manufacturing industry is particularly affected by challenges recruiting staff, with skills shortages in engineering and technical roles a growing constraint, urging greater investment in vocational training and apprenticeships to build a strong manufacturing workforce.

Factors Affecting Cost Base and Staff Recruitment

How have the following costs changed over the past 12 months for your organisation?

Figure 30



The industry continues to face significant cost pressures across multiple areas, with increases reported in nearly every major category, which risks constraining investment in innovation and limiting participation in the UK market. When asked to comment on what has driven the cost changes, industry highlighted a combination of macroeconomic, regulatory, and policy-driven factors contributing to widespread cost escalation. The most frequently cited drivers were inflationary pressures and increases in Employer's National Insurance (NI), which have significantly raised labour and staffing costs.

Sustainability requirements and regulation demonstrated the most detrimental increases to companies, with over 50% reporting 'increased by 11%-50%' or 'increased by >50%' in the past 12 months. Those who reported these increases mentioned rising Notified Body charges under EU MDR, as well as the escalating cost of maintaining access to NHS frameworks and fulfilling sustainability and social value reporting requirements.

The sharp rise in sustainability requirements as the NHS moves towards Net Zero has also influenced the increase in cost to serve the NHS. Combined with general inflation and new compliance obligations, fixed-term NHS framework pricing, often lasting seven to nine years, is no longer viable in the current economic climate. This has resulted in 27% of companies removing products from sale as a result of below cost selling prices, see figure 28.

For manufacturing companies, considerable increases in most categories are driving up operational costs across the board, having a significant strain on affordability and constraining reinvestment. Manufacturing companies also noted that recent tax and visa threshold changes have further amplified workforce expenses, which are likely main contributors to over 80% of companies noting increases in labour costs.



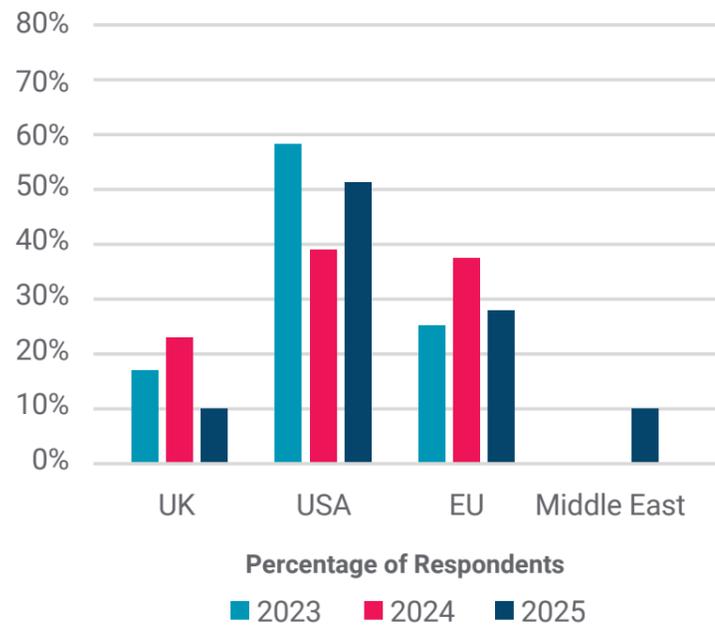
MANUFACTURING

The UK HealthTech sector is one of the nation's most advanced and strategically important manufacturing industries. According to the latest [Bioscience and Health Technology Sector Statistics \(2023/24\)](#), 1,386 HealthTech companies in the UK are involved in manufacturing, generating a combined turnover of £20.9 billion and employing more than 83,000 people where manufacturing is their primary focus. These figures underline the sector's critical role in delivering high-value manufacturing, exporting innovative technologies worldwide, and driving regional economic growth across the country.

Supportive manufacturing environments – a geographical view

Please select the MOST attractive market (geography) for a supportive manufacturing environment.

Figure 31



The industry views the United States as the most commercially attractive and supportive environment for HealthTech manufacturing due to clear FDA pathways, efficient 510(k) approvals, and strong early-stage investments. The US remains the benchmark for speed to market and investor confidence, though high operational costs and trade uncertainty are seen as ongoing challenges.

Although the industry sees the UK as an excellent base for R&D and clinical evaluation, companies note it is one of the more difficult places to scale manufacturing, falling significantly behind both the EU and US in companies' perceptions of the UK having a supportive manufacturing environment. Despite positive initiatives such as the Life Sciences Innovative Manufacturing Fund, regulatory uncertainty,

bureaucracy, high costs, and slow NHS adoption reduce the number of HealthTech companies choosing the UK to scale manufacturing.

The EU is viewed as having deep industrial capability but declining agility. The MDR framework continues to drive higher compliance costs and slower approvals, making Europe less attractive for new product launches despite its large integrated market.

The Middle East is increasingly seen as a region of rapid progress and opportunity. The industry notes strong government investment and the creation of innovation zones improving manufacturing attractiveness, although local infrastructure and SME accessibility are still developing.

Challenges in Manufacturing

The sector reports a consistent set of challenges constraining the growth and competitiveness of UK-based HealthTech manufacturing. Companies describe a high-potential sector that is facing unsustainable cost, and regulatory and structural pressures.

UK manufacturing has [reduced from 17% to 8% from 1990 to 2024](#), a reduction that has been heavily influenced by cost pressures for these companies, including growing energy, labour, packaging, freight expenses and regulatory costs, which leaves companies with reduced capacity to invest, constraining growth. The HealthTech sector is uniquely challenged compared to other manufacturing sectors as HealthTech companies typically have a single dominant customer in the NHS. This creates a structural challenge: suppliers face sustained pressure on input costs, while the NHS is often unable or unwilling to absorb inflation-related price increases. As a result, rising electricity costs are disproportionately absorbed by manufacturers, placing pressure on margins and operational viability. Several companies indicated that energy

costs alone have rendered domestic production unviable. As [manufacturing is one of the highest Gross Value Add sectors](#) and the life sciences is a key priority of the government, the UK must take a more considered approach to reducing business costs, such as ensuring HealthTech regulatory charges are internationally competitive and providing targeted exemptions to rising energy costs to prevent further loss of HealthTech manufacturing.

For SMEs, particularly those investing in automation and tooling, access to capital remains a major barrier. Companies note that UK grant processes are often slower and more complex than competitor nations. The sector in general highlighted that fragmented funding programmes are creating structural barriers, alongside limited access to shared cleanroom and sterilisation facilities.

Tariffs, taxation and trade uncertainty continue to create planning difficulties, with companies seeking greater clarity on post-Brexit arrangements and long-term trade agreements.

Support to Grow Manufacturing

The industry highlighted the importance of the UK having a delivery-focused innovation model to strengthen HealthTech manufacturing and scale-up. Whilst the UK is recognised for scientific excellence and R&D, companies identify capability gaps in automation, prototyping, cleanroom access and digital infrastructure that are limiting competitiveness.

A key priority highlighted by the sector was the development of dedicated scale-up facilities that integrate innovation, prototyping and pilot production, similar to international examples such as the Mayo Clinic's Discovery Oasis, which supports SMEs in transitioning from R&D to commercial manufacturing. Expanding access to ISO-compliant cleanrooms is also a key priority as the sector believes this would strengthen the UK as a manufacturing base and enable scale-up.

Automation and digitalisation remain central to improving productivity, therefore greater investment in advanced manufacturing technologies could create an environment where UK HealthTech manufacturing companies can scale more efficiently and compete globally. Investment in advancing digital skills in the UK is essential to maintain a skilled manufacturing workforce and draw global companies to the UK.



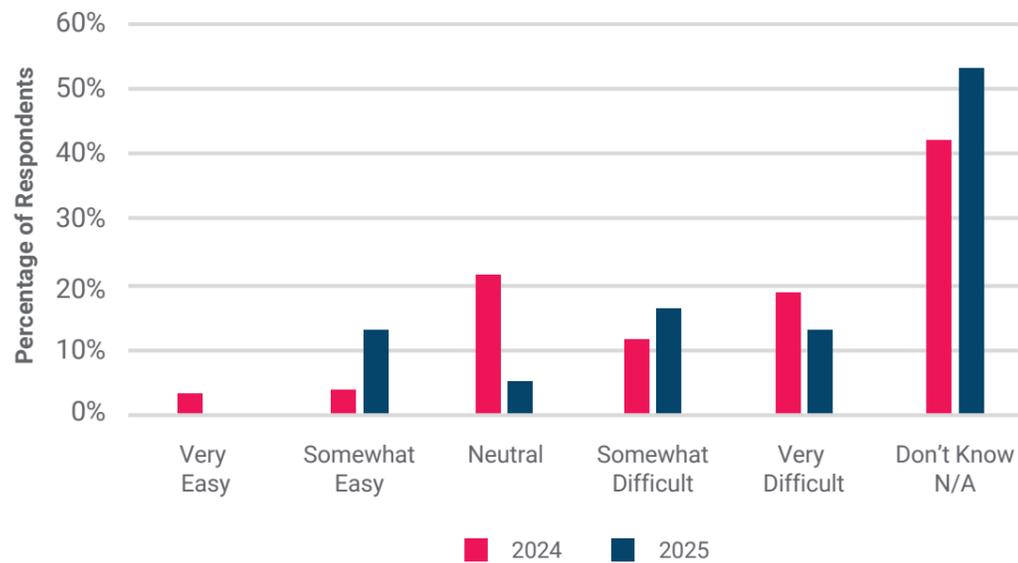
ACCESS TO FUNDING

Developing new HealthTech products remains a long, high risk and resource intensive process, with extended timelines between invention and first revenue creating cash flow pressures, particularly for SMEs and start ups. The UK offers early stage support through bodies such as Innovate UK and the National Institute for Health and Care Research (NIHR), and benefits from a well established private funding ecosystem of private equity, angel investors and venture capital. However, long development timelines, regulatory complexity and investor expectations around time to market remain major barriers for many companies.

Securing Private Investment

How easy have you found it to secure private investment in the UK?

Figure 32



Over half of companies are not seeking private investment, often due to their ownership structure or business model. For those who are, there were mostly negative perceptions of the ease of securing investment, with barriers include the long timelines and regulatory complexity inherent in HealthTech which investors often perceive as high-risk. Pre-revenue businesses were singled out as particularly disadvantaged, with respondents noting unrealistic expectations around time to market and return on investment. Concerns were also raised about the limited appetite among UK investors for long-term

innovation, with a preference for short-term gains cited as a recurring theme. This is a particular challenge for SMEs due to the time and resources needed to secure investment in the first instance. Where success was achieved, it was typically attributed to personal networks and sustained effort rather than systemic support. There were, however, positive examples with some organisations highlighting trade missions and sector engagement as helpful, but the overall picture suggests that attracting private capital remains a structural weakness for the UK market.

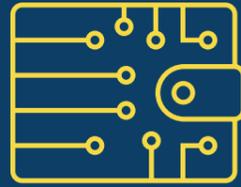
Ease of Securing Private Investment

The industry continues to highlight the need for targeted public funding to strengthen innovation and commercialisation across UK HealthTech. As in last year's Pulse of the Sector survey, the industry emphasises that support for regulatory engagement remains a critical enabler of innovation, with many companies calling for dedicated funding to help them interact more effectively with regulators throughout product development. The industry also sees particular value in funding to generate real-world evidence and to support regulatory engagement through MHRA and NICE, recognising that the ability to demonstrate clinical and economic value is often decisive for uptake.

For manufacturing companies, there is clear appetite for scale-up funding to help companies bridge the gap between prototype and commercial manufacture. Other sector-specific programmes were proposed, particularly in diagnostics, digital health, AI, low-carbon technologies and sustainability, with expanded support for translational research and public-private partnerships that connect academic and industrial innovation more effectively.

There is strong demand for NHS adoption and procurement support, particularly funding to enable pathway transformation and create a clearer, more transparent process for integrating new technologies into clinical care. The industry notes that the absence of such mechanisms continues to slow the adoption of innovative products and digital solutions, limiting patient access to life-saving technologies.

The industry views the introduction of a German-style NUB (new diagnostics and treatments) system, offering short-term reimbursement for innovative, high-cost medical technologies as valuable. Such a mechanism could accelerate NHS access, generate early clinical evidence, and provide a clearer pathway to long-term adoption.



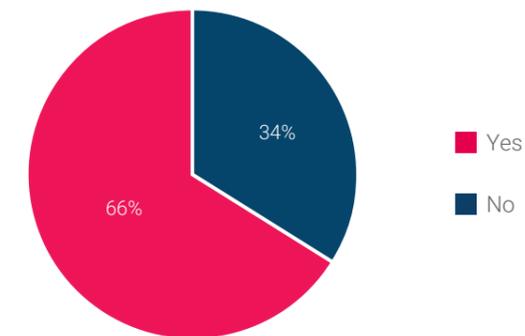
DIGITAL AND AI

HealthTech's digital sector continues to evolve rapidly, presenting new and complex challenges for regulators compared with traditional medical devices. As the use of AI, data-driven algorithms, and connected digital platforms expands across healthcare, the industry stresses the need for a clear, proportionate and agile regulatory framework. Ensuring that digital health technologies can be developed, validated and adopted safely and efficiently is now essential to realising their full potential to transform healthcare delivery, improve patient outcomes and support NHS productivity.

Digital Regulation and AI

Are you planning to build or incorporate AI into your existing or future product pipeline?

Figure 33



The industry is increasingly prioritising the integration of AI into HealthTech innovation pipelines, with around two-thirds of companies indicating plans to build or incorporate AI into existing or future products. AI is viewed as a strategic enabler of next-generation healthcare technologies. Companies report using AI to enhance diagnostic accuracy, accelerate treatment through predictive analytics, and integrate diverse data streams to support clinicians. AI is also being embedded within digital pathways, wearable devices, and connected platforms, providing real-time insights and improving workflow efficiency.

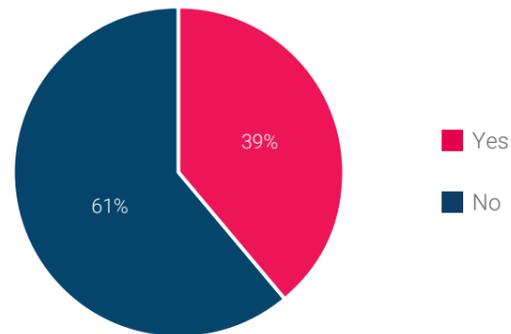
The industry also highlighted the growing role of AI in accelerating R&D, supporting faster assay development, design optimisation and predictive maintenance in complex systems. Additional applications include patient engagement tools, post-operative support, and surgical robotics, as part of a broader shift toward digital transformation.

Despite this extensive list of the uses for AI in medical technology, around one-third of companies are not yet planning AI integration. The industry attributes this to early-stage development cycles, limited relevance for certain device types, or a lack of in-house expertise. This variation suggests that while AI adoption is gaining strong momentum, a significant portion of the sector remains in exploratory or preparatory phases.

Digital Regulation and AI

Do you feel confident that HealthTech products using AI will be adopted and proportionately funded in the UK?

Figure 34



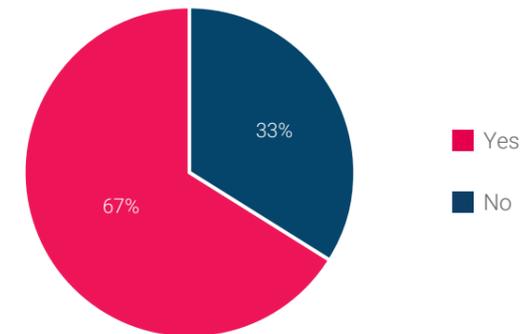
There is a lack of confidence, reported by 61% of respondents, that AI technologies will be adopted and funded at a level proportionate to the value they deliver. Many companies expressed concern that even when products receive positive evaluations or demonstrate strong results in pilot sites, this does not translate into funding or consistent uptake across the NHS.

Companies also noted that regulation will need to improve at pace to keep up with the development of AI products, and be supported by a regulatory workforce with an expertise in AI. Respondents further highlighted that, to date, there has been limited strategic development in funding models for AI and HealthTech more broadly, with activity largely focused on guidance and policy rather than on creating long term, sustainable investment mechanisms.

Digital Regulation and AI

Is there anywhere else in the world which is better at encouraging the use of AI in HealthTech products?

Figure 35



The industry believes that the UK is falling behind other countries in encouraging and enabling the use of AI in HealthTech products. Two-thirds of companies report that other nations are doing more to promote AI innovation and adoption. The United States is most frequently cited as the leading example, recognised for its rapid adoption rates and faster regulatory approval of AI-enabled technologies.

Some companies also point to Germany's DiGA model as a benchmark for best practice. This structured reimbursement pathway allows approved digital health applications that demonstrate safety, data protection, usability and clinical benefit to be reimbursed through statutory health insurance, significantly accelerating market access. France's PECAN scheme for fast tracking digital devices was also highlighted as

a comparable approach, providing temporary reimbursement for digital health technologies that are still generating evidence. It should be noted that both DiGA and PECAN have a limited scope and are not AI specific programmes.

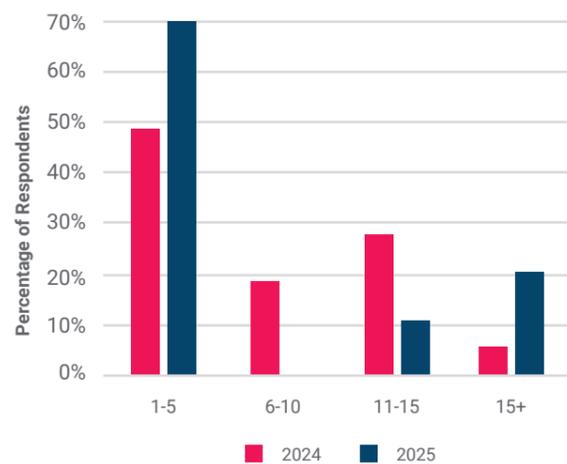
Israel was identified as another flagship market, where a fully digitalised healthcare system, combined with world-class technical research and strong government-industry collaboration, creates an environment that actively supports AI adoption in HealthTech.

The industry sees this as a strategic challenge for the UK. Whilst national ambitions for AI in healthcare are high, systemic barriers and slow regulatory and procurement processes continue to hinder progress and risk eroding the UK's competitive position in digital and AI-driven innovation.

Information Governance

If you have a relevant product, can you provide the average time it has taken for you to complete the Data Protection Impact Assessment (DPIA), in weeks?

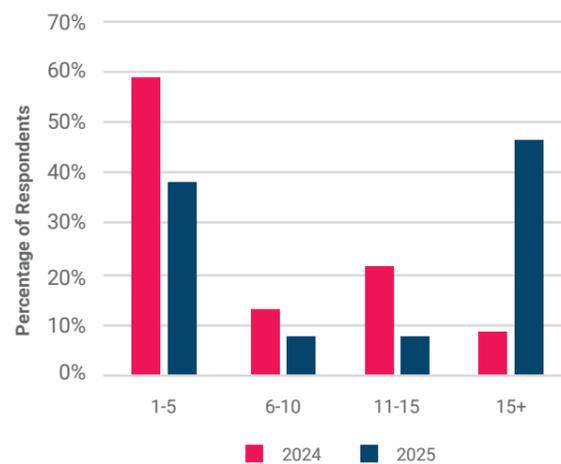
Figure 36



Regulation of digital technology has proved a challenge for a significant number of years. The Data Protection Impact Assessments (DPIA) and Digital Technology Assessment Criteria (DTAC) were initiatives designed to help, however a lack of standardisation in outcomes and unpredictable timelines presented challenges initially. Since then, there has been notable improvement in DPIA timelines, with over 70% of companies completing DPIAs within 1-5 weeks, compared to less than 50% in 2024. However, 20% of report timelines still exceed 15 weeks, indicating persistent delays for some organisations, and over 65% of respondents report the DPIA to have 'no impact' on the UK's attractiveness or be 'unsure' as to what it is, highlighting the need for greater communication of this initiative.

If you have a relevant product, can you provide the average time it has taken for you to complete the Digital Technology Assessment Criteria (DTAC), in weeks?

Figure 37



Alongside this, companies were asked to provide an average time for completion of the Digital Technology Assessment Criteria. Although around 38% of respondents complete DTAC within 1-5 weeks, a decline from 2024, almost half now report timelines of 15 weeks or more, suggesting growing complexity or resource constraints. Aligning these timelines with the fact that over a quarter of respondents view the DTAC as negatively impacting the UK's attractiveness, highlights the need for greater standardisation and streamlined implementation to reduce duplication, shorten unpredictable timelines, and support innovation.

SMEs face greater challenges compared to large organisations, due to the lack of a dedicated compliance team, which could be leading to the large variation seen in reported timelines.



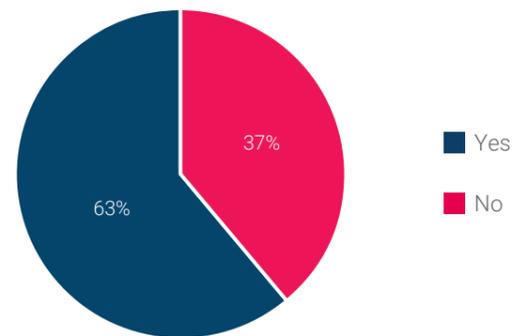
SUSTAINABILITY

The HealthTech sector remains firmly committed to reducing carbon emissions, with companies continuing to invest significantly in sustainable practices. Over the past year, there has been notable progress in embedding sustainability into supply chains and advancing compliance with the NHS Net Zero Supplier Roadmap. However, implementation challenges persist, particularly for SMEs navigating complex requirements and resource constraints. Whilst the NHS has strengthened engagement with suppliers and expanded guidance, the scale of the ambition means further collaboration and targeted support from government will be essential to accelerate progress and ensure long-term success.

Net Zero by 2045

Do you feel your organisation will be able to meet the target to be Net Zero by 2045?

Figure 38

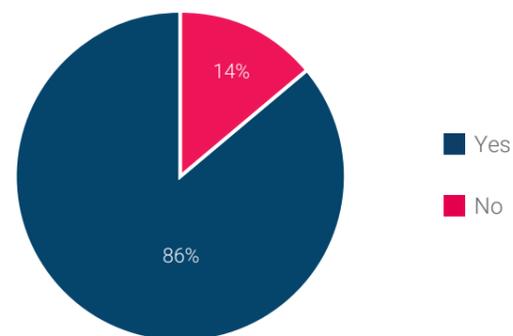


Ambitions remain clear for achieving Net Zero, with 63% of companies believing they will be able to reach Net Zero by 2045 and 86% expecting to reach Net Zero by 2050. These figures reflect sector commitment to align with global sustainability goals, despite the challenges posed by evolving regulations and economic pressures. Businesses are increasingly embedding carbon reduction strategies into their long-term planning, signalling that Net Zero is not just an aspirational target but a core component of future competitiveness and resilience.

Net Zero by 2050

Do you feel your organisation will be able to meet the target to be Net Zero by 2050?

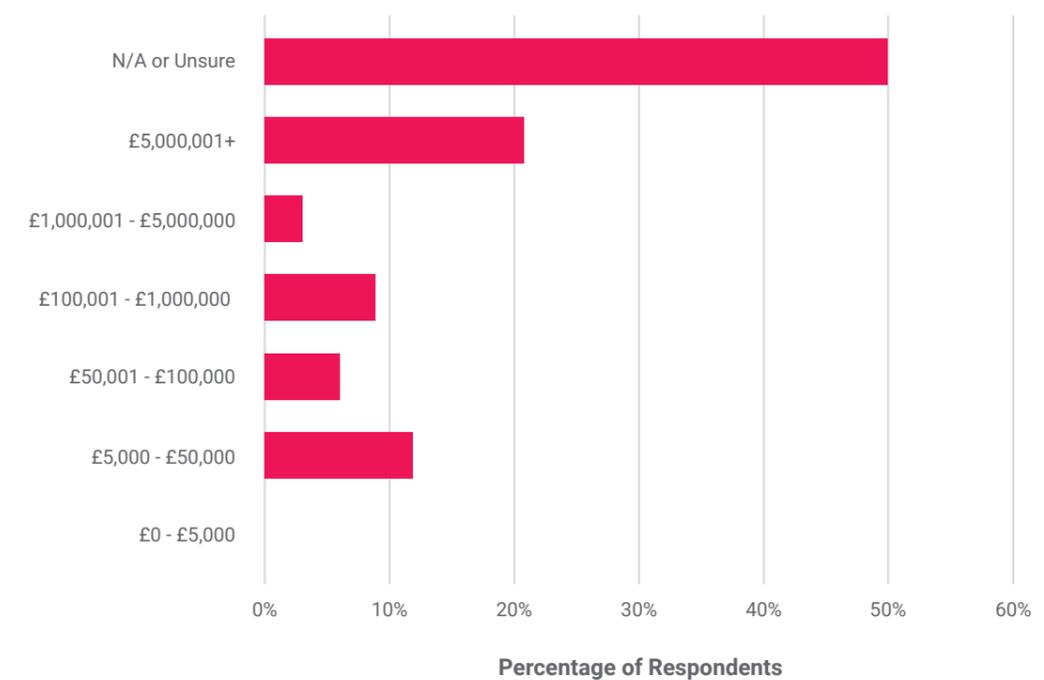
Figure 39



Worryingly, the NHS Net Zero Supplier Roadmap remains the most negatively rated UK government initiative, with more than 60% of companies believing it harms UK attractiveness, twice as many as any other initiative, see Figure 18.

Are you able to estimate (in £) how much the transition to net zero may cost your organisation?

Figure 40



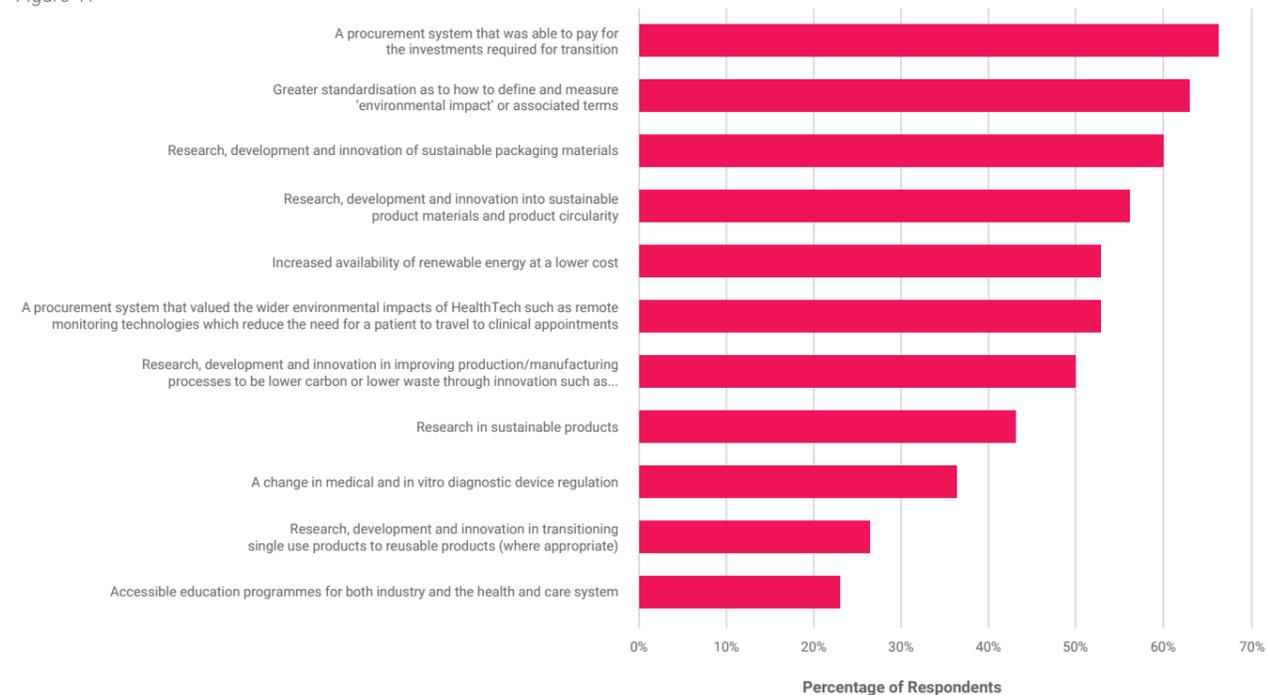
The negative perceptions around the transition to Net Zero are mostly related to cost, with sustainability amounting for the second largest increases in costs for companies in 2025. The sector was asked to estimate the cost of transitioning to net zero, although over 50% of respondents were unsure or unable to provide an estimate, with those who did reporting figures ranging from £5,000 to over £5 million, with the largest proportion of estimates falling in the £5,000–£50,000 and £5 million+ brackets. This variation underscores the variation in

cost depending upon organisation type, scale and operating model and highlights the challenge of forecasting costs, with some figures acknowledged as speculative rather than precise. To support companies with cost pressures of sustainability transitions and reporting, better transparency of how environmental impact will be defined and measured is required, as well as building trust that the procurement system will pay for sustainable products.

Support to Achieve Lower Environmental Impact

What may support your organisation to achieve a lower environmental impact?

Figure 41



The industry identifies several critical enablers needed to accelerate the HealthTech sector's transition to sustainability. Similarly to last year, the two highest priorities are a procurement system that can fund and reward investments in sustainability, reflecting the true cost of low-carbon manufacturing and product redesign, and greater standardisation in how environmental impact is defined and measured. These priorities reflect a sector that has endured incurring costs at risk with no guarantee the NHS will adopt the more sustainable solution if cheaper alternatives are available. In the future, coordinated action across policy, procurement,

and innovation is needed for sustainable HealthTech to be commercially viable and for the ambitions of the NHS Net Zero Supplier Roadmap to be achieved.

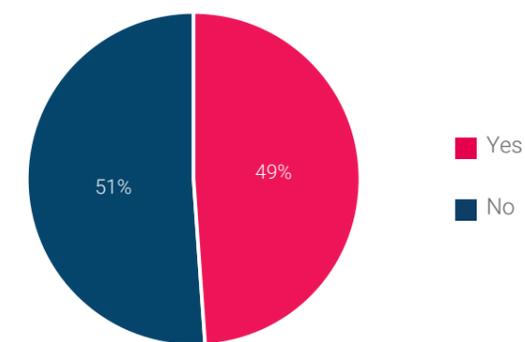
Alongside this the sector called for increased R&D investment in sustainable materials, packaging, and circular product design, with more than 50% of companies highlighting this as valuable. We support the work that has been driven through the Department of Health and Social Care's (DHSC) ['Design for Life'](#) roadmap and look forward to seeing this plan brought to action.

Sustainability Reporting

The NHS Net Zero Roadmap sets ambitious targets to reduce emissions across healthcare, with major implications for HealthTech. Companies must now measure, report and cut carbon throughout product lifecycles, from manufacturing to disposal. The roadmap makes sustainability a core procurement requirement, creating both pressure to adapt, and an opportunity for innovators to lead through low-carbon materials, circular design and digital solutions that help the NHS achieve its Net Zero goals.

Has your organisation completed a lifecycle assessment of any of your products?

Figure 42



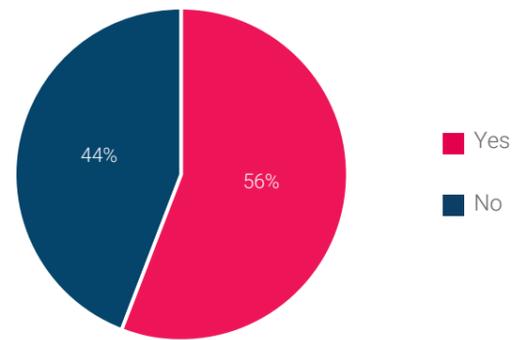
Around 50% of companies have completed a lifecycle assessment (LCA) for at least one of their products. This is a positive step for sustainability reporting particularly if this reporting is being used to consider developing more sustainable processes. Some respondents noted they are in the process of building capacity for LCAs as part of broader sustainability efforts. As expected, cost is a major factor in preventing companies undertaking LCAs for their products, with those who had completed LCAs for their products reporting a cost of £30,000 - £50,000 per LCA. This likely

accounts for sustainability being the second largest increase in cost for companies in 2025. Time and resources were also noted as key barriers preventing companies completing LCAs, particularly for SMEs, which, account for the majority of the UK HealthTech sector.

Both respondents who had and had not completed LCAs highlighted the lack of clarity around methodology for completing LCAs as a key issue. This highlights there is a need for such a methodology to provide suppliers with confidence in their LCAs.

Has your organisation measured the carbon footprint of any individual products?

Figure 43



As part of LCAs, many organisations measured the carbon footprint of products as standard when assessing their climate change impact. Given that carbon footprinting is less resource intensive and less costly than completing a full LCA, it is unexpected that it is not used more widely. The industry reported a range of approaches when measuring environmental impact, with larger organisations developing comprehensive internal programmes and others relying on external consultants or academic institutions.

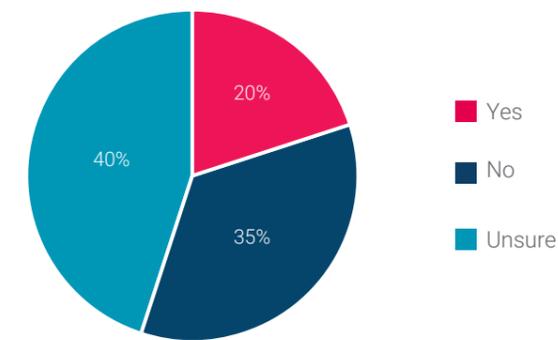
The sector noted that the challenges associated with measuring carbon footprint of products are similar to those encountered with LCAs, including cost and resources, with the biggest effect on SMEs.

Scope 3 Reporting

Scope 3 emissions reporting is becoming an essential part of sustainability requirements, as it covers all indirect greenhouse gas emissions that occur across a company's value chain, outside of its direct operations. These include emissions from suppliers, product use, transportation, and waste disposal. While Carbon Reduction Plans (CRPs) required by the NHS Net Zero Supplier Roadmap currently mandate reporting on five specific Scope 3 categories, broader sustainability frameworks and investor expectations increasingly call for more comprehensive disclosure across all categories defined by the Greenhouse Gas Protocol to demonstrate transparency. For the HealthTech sector, this is particularly important given the complexity of global supply chains and the lifecycle impact of medical devices. Understanding whether organisations are going beyond these minimum requirements is important for assessing sector readiness for the 2027 milestone and identifying support needs.

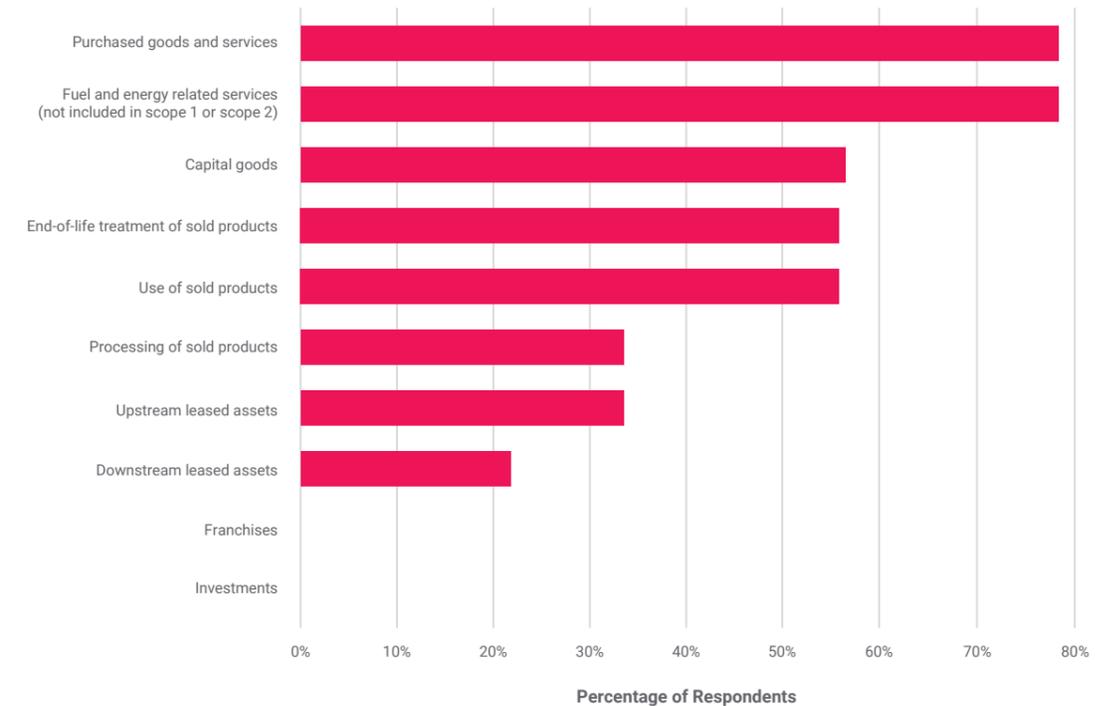
Is your organisation currently reporting on scope 3 categories beyond the five currently required for Carbon Reduction Plans (CRPs) by the NHS Net Zero Roadmap?

Figure 44



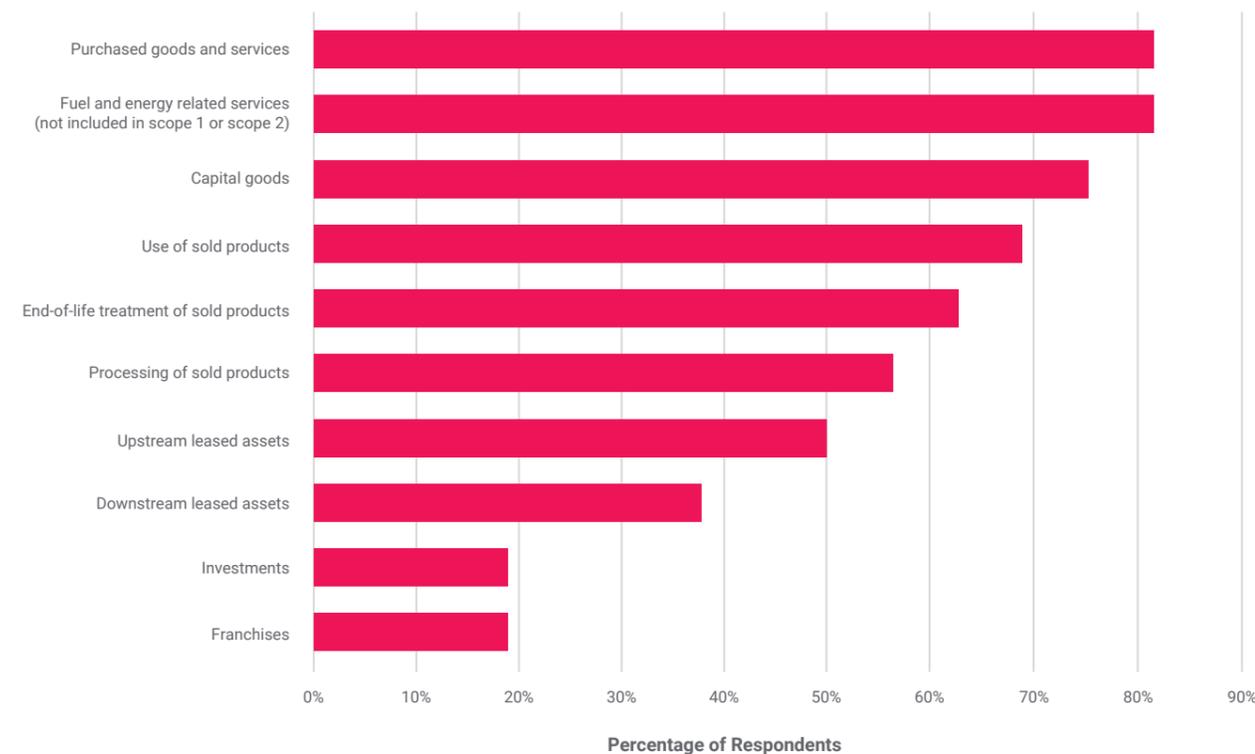
The industry was asked which categories they are currently reporting on.

Figure 45



The industry was asked which categories they will be ready to report on by 2027.

Figure 46



Currently, only one fifth of companies are reporting on scope 3 categories beyond the five currently required by CRPs, highlighting further work is needed to support companies with the complex process of sustainability reporting. For those who were reporting on Scope 3 measurement beyond current requirements, companies most commonly listed purchased goods and services and fuel-and energy-related activities as categories they were reporting, with 78% of companies currently reporting these and this expecting to rise to 81% by 2027.

The categories listed as the most challenging to report were investments and franchises, with no respondents currently reporting these categories and, 85% and 69% believing their company would not have the scope to report on franchises and investments, respectively. The challenge with reporting on investments and franchises is due to the differing sustainability reporting requirements globally.

Alongside this, companies were asked to list the challenges their organisation will face in reporting on these categories by April 2027. Concerns listed included the lack of reliable data collection method from previous years, financial burden and resource constraints, including the lack of dedicated, specialised staff to tackle the technical complexity of sustainability reporting.

Whilst sustainability is unquestionably a positive force for the sector, and companies are already doing a great deal to reduce their environmental impact, the practical implementation of the NHS Net Zero Supplier Roadmap remains a significant challenge. When asked, "How do you think the following initiatives are affecting the attractiveness of the UK as a HealthTech market?", companies identified the NHS Net Zero Roadmap as the single greatest initiative detracting from the UK's overall attractiveness. This reflects the urgent need for clearer guidance, procurement processes that recognise and reward genuine sustainability efforts, and greater alignment with other global jurisdictions to ensure consistency for innovators.



EXPORTING

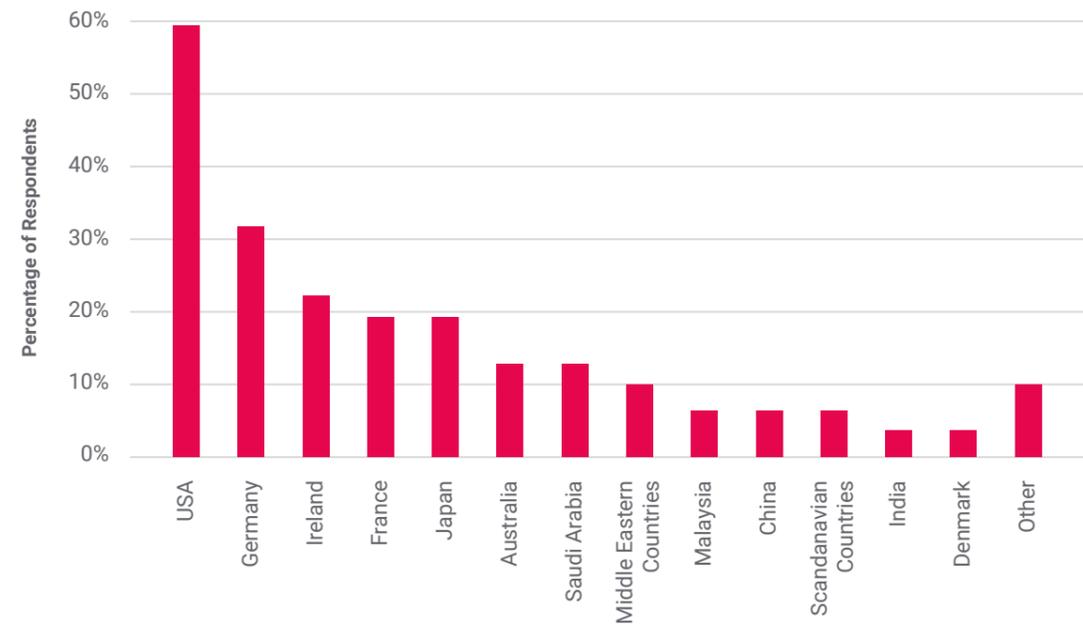
Despite renewed efforts to boost international trade, UK HealthTech exports have shown only modest growth over the past year, continuing a trend of stagnation that contrasts sharply with global expansion. Worldwide, HealthTech exports are growing at an estimated [5.5% annually](#), driven by rising demand for digital health and AI-enabled solutions.

If the UK could match this trajectory, it could reduce its [£5.4 billion trade deficit](#) in medical technology products, helping to narrow the country's [persistent trade deficit](#), which is still among the largest in Europe. Industry leaders warn that without a strategic push to scale exports, the UK risks falling further behind competitors who are capitalising on global market opportunities. A renewed focus on internationalisation, regulatory alignment, and trade facilitation will be critical to reversing this trend and unlocking growth potential.

Overseas Markets

Which are your biggest overseas markets by turnover? (select up to 3).

Figure 47

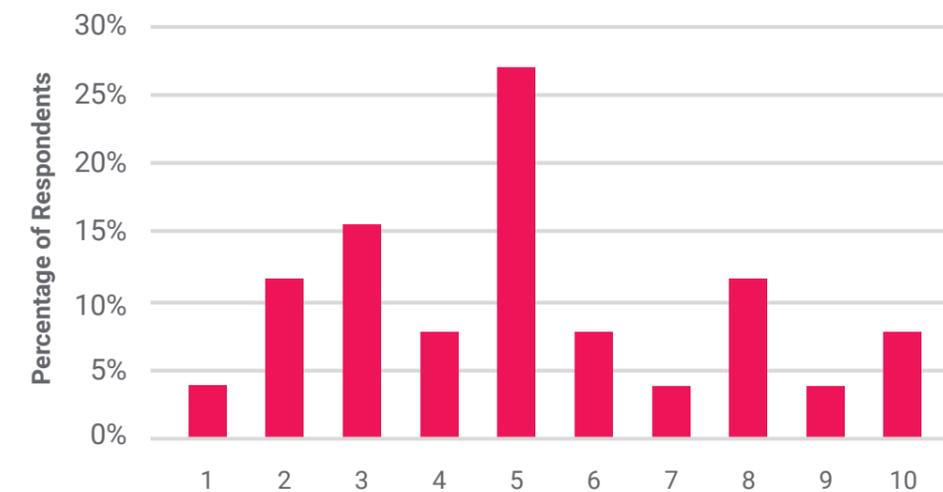


61% of organisations surveyed export from the UK, of these companies 40% of their turnover comes from exporting. The US is, by far, the biggest overseas market for UK exporters, with almost double the number of companies listing this as their biggest overseas market compared to the closest second market, Germany. Compared to 2024, Ireland overtook France, moving into the top three biggest export markets for exporting companies.

Export Support Offer

On the below scale of 1-10, where 10 is excellent, please rate the UK's support offer for UK businesses looking to export.

Figure 48



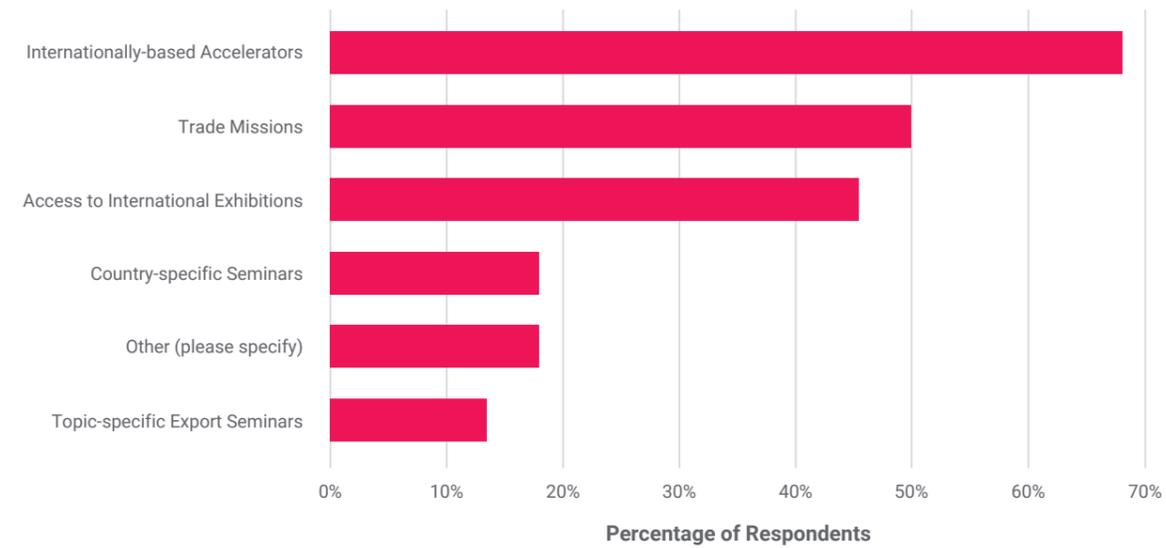
The industry was asked to rate the UK's support offer for UK businesses looking to export and expand on the reasons behind these ratings. Limited financial support for SMEs was the most frequently cited challenge, with the industry describing funding as insufficient or overly reliant on consultancy fees. Post-Brexit trade complexity continues to weigh heavily, with respondents highlighting regulatory hurdles and a lack of coordinated guidance for navigating international compliance.

Sector-specific gaps were evident, particularly for MedTech, where respondents felt commercial pathways and visibility abroad remain unclear. There were positive mentions for HealthTech trade missions, which were seen as valuable in opening doors internationally, and ABHI's International Accelerators were acknowledged as being helpful in this regard. However, the industry reported a reliance on internal resources to achieve export success and inconsistent delivery of support at a country level, underscoring a perception that government support remains limited in scope and impact. While the UK's global brand and the reputation of the NHS were acknowledged as assets, respondents stressed that these alone cannot compensate for structural weaknesses in export facilitation.

Export Products and Services Support

What support would you most like to see from the UK Government to assist in exporting your product?

Figure 49



For the UK to become a thriving export market for HealthTech, supporting international accelerators and trade missions are the most helpful initiatives the UK Government could take. These measures would address challenges HealthTech companies face with unclear commercial pathways and limited visibility abroad, while positioning UK HealthTech as a trusted global partner.

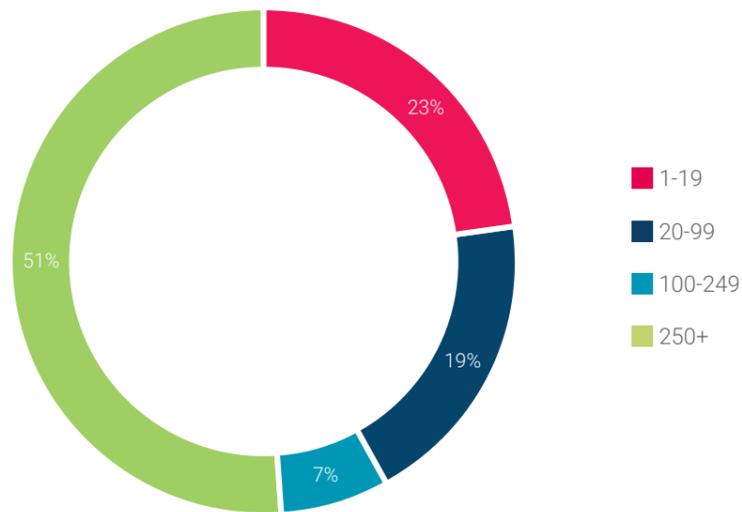


BREAKDOWN OF RESPONSES

Companies by Size

What is the size of your company? (Number of People)

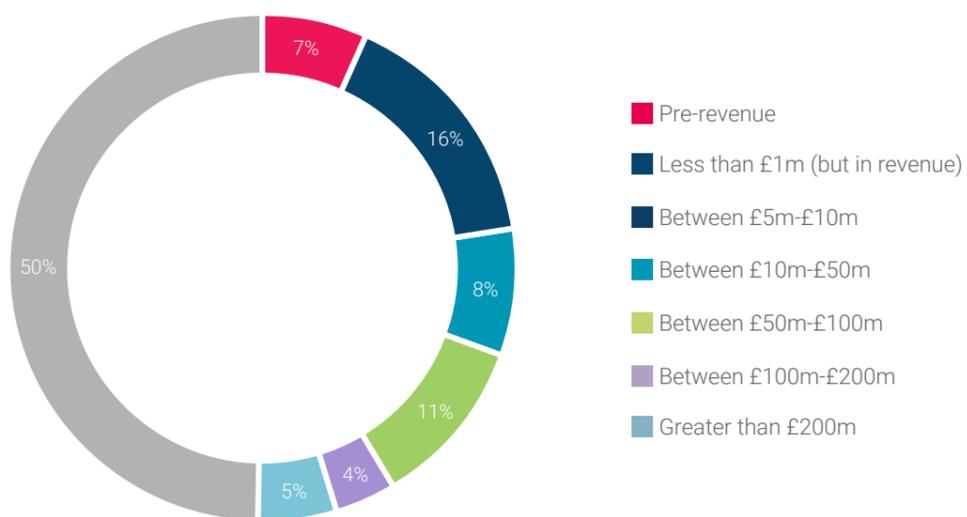
Figure 50



Companies by Turnover

What is the turnover of your company?

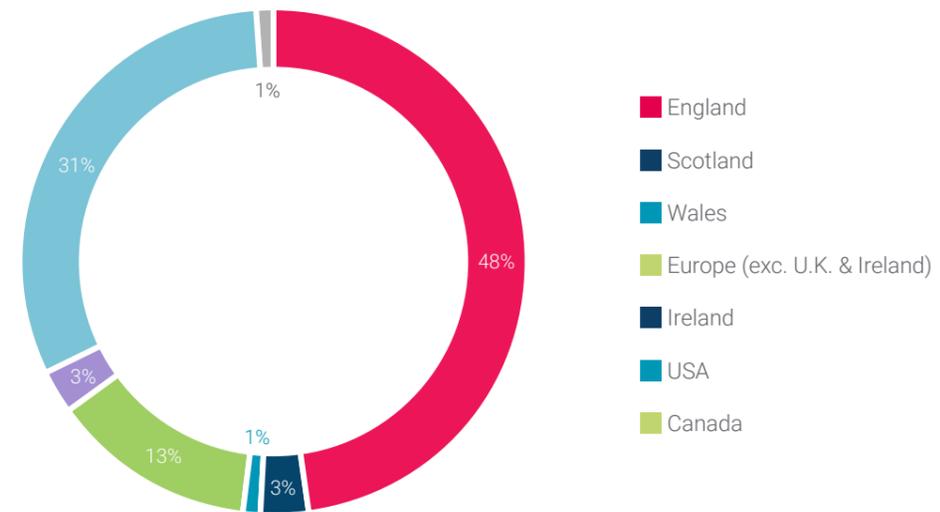
Figure 51



Company Location

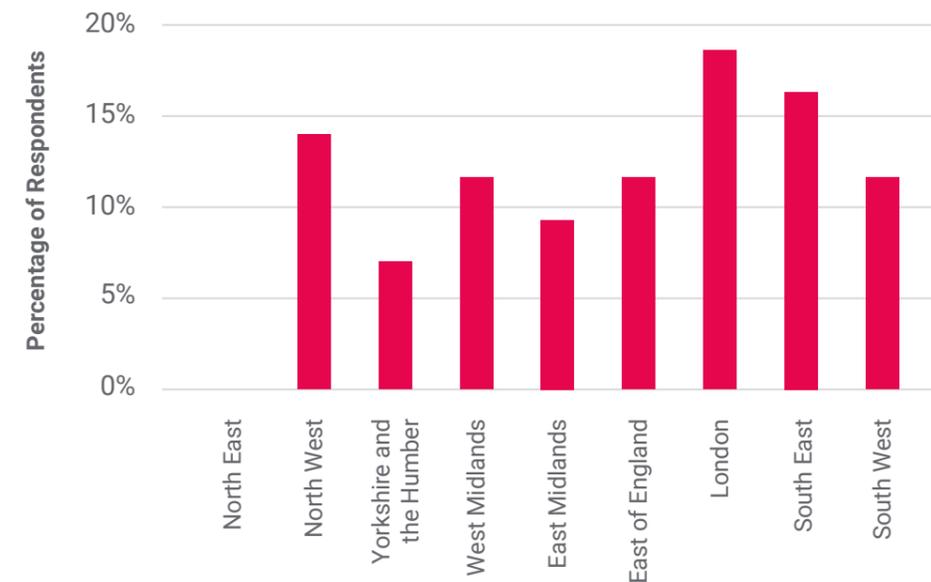
What is the location of your headquarters?

Figure 52



If specified England, which part?

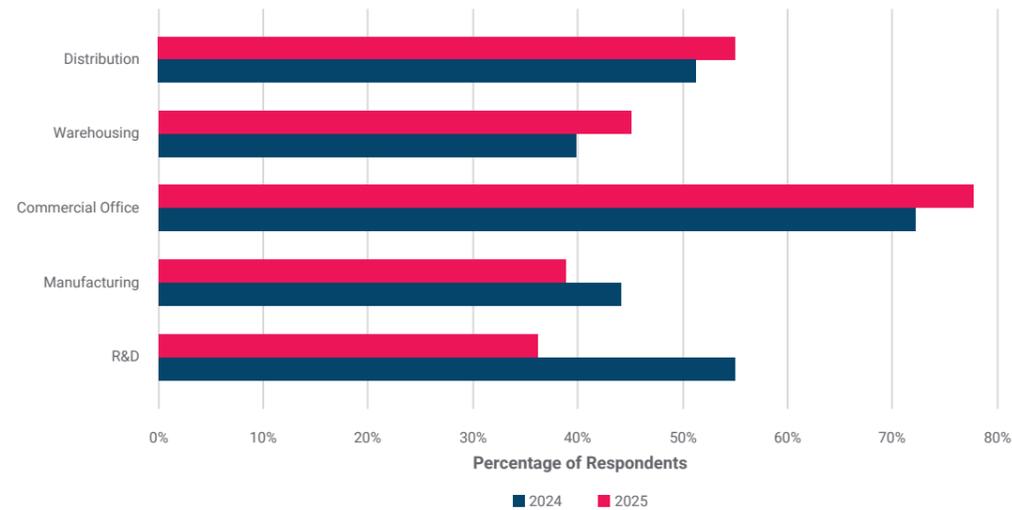
Figure 53



Companies by UK Presence

What is your company's presence in the UK?

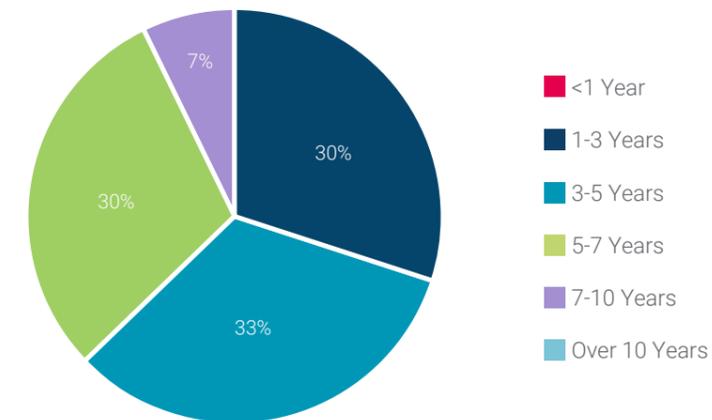
Figure 54



Time from Idea to Approval

From your experience, what do you believe is the average time-to-market for a new product in the UK, from a feasible idea to regulatory approval for sale?

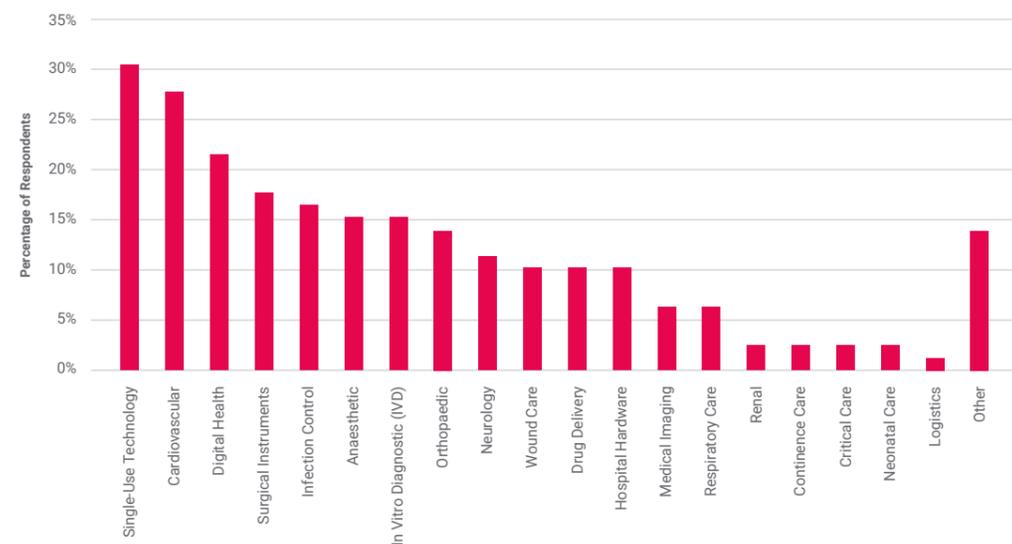
Figure 56



Companies by Sub Sector

What is your presence in the UK?

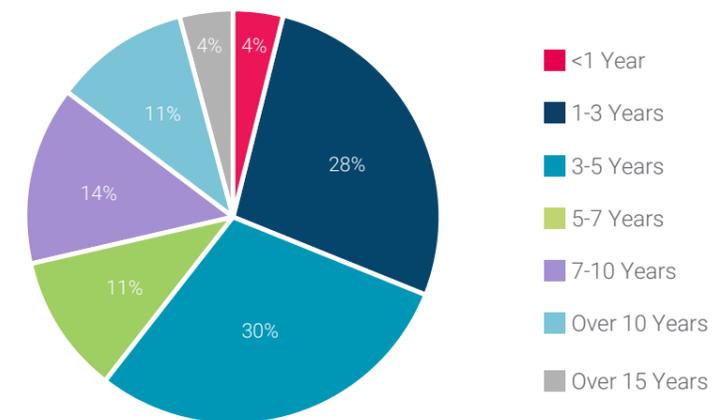
Figure 55



Time from Regulatory Approval to Adoption

From your experience, what do you believe is the average time-to-market for a new product in the UK, from regulatory approval to full adoption?

Figure 57



ABHI

