

INDUSTRY OVERVIEW

The Medical Technology Industry in Germany

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Seize the Opportunity in Europe’s Biggest Market

“As Europe's largest economy, Germany plays a key pioneering role in healthcare. The innovative spirit and care with which medical innovations and new medical devices are accepted and integrated into patient care ensure that patients have access to the latest treatment options. Together with our German partners we are committed to shaping the future of pain therapy.”

Gerd Gottschalk
Director Market Access International, Nevro (Germany)

EUR 538 bn
total healthcare spending in 2024 (estimate)

>EUR 35 bn
medical technology market in 2025

3.3 percent
CAGR medtech market growth through to 2029

~1,500
medtech manufacturers (with more than 20 employees) in Germany in 2025

EUR 46 bn
total medtech production value in Germany in 2024

>265,000
medical technology sector employees in 2024

The market volume for medical technology is estimated at over EUR 35 billion in 2025, with a positive growth outlook of 3.3 percent CAGR through to 2029. This makes Germany the largest medtech market in Europe, with the country placing third worldwide in the global market volume ranking behind only the USA and China.

Germany enjoys a deserved reputation as a location for high-tech medical technology innovation. Its pool of over 100 large manufacturers, often market leaders in their respective segments, are internationally renowned and account for around 56 percent of total industry revenue. However, SMEs

and micro companies account for the majority of the workforce. Together, they employ over two thirds of the domestic industry’s total labor force of 265,000 people.

Many local ecosystems are supported by the national go-cluster program and its cluster networks. Dedicated cluster management teams facilitate innovation partner identification, help obtain funding for R&D projects and oversee educational training programs for their members. International manufacturers and service providers are welcome to reach out and build their business presence in Germany.

Germany’s Medical Technology Industry in Numbers

Industry Structure
Germany’s medtech sector features a mix of small, medium, and large manufacturers. Of the over 1,500 companies employing 20 or more people, 93 percent are SMEs. Although most of the workforce is concentrated in major metropolitan areas, there are notable exceptions – take Tuttlingen, a small town long celebrated as the cradle of medical-instrument manufacturing in Germany.

Medical Technology “Made in Germany”
Total production value in Germany’s medtech industry reached EUR 46 billion in 2024. The variety of products manufactured covers the entire medical device spectrum: from disposable bulk commodities to high-value investment goods. The most common areas of manufacturing are the prosthesis and orthopedics segments, with around 900 manufacturers active in these fields. In more specific areas – like alpha-, beta-, and gamma radiation and x-ray equipment – the industry segment typically consists of around 50 players manufacturing in Germany. An equal number is seen in the segment of catheters and canulas being produced on the more low-tech side.

Leading Innovation in Europe
Innovators from Germany topped the European ranking for medtech patent applications with 1,487 patent applications in 2024. This is almost twice as many patents as the second-most innovative country in the EU – reflective of industry investment of nine percent of revenue in R&D. As a result, one third of industry turnover now comes from products launched within the last three years. According to medtech industry association BVMed’s 2024 survey, manufacturers regard cardiology, oncology, diagnostics, neurology, and surgery as the most cutting-edge fields.

International Trade Champion
Germany’s role as an international medtech hub and its excellent reputation for quality worldwide was reflected by medtech exports reaching a record EUR 31.8 billion in 2024. Of that total, roughly 39 percent was shipped to EU member states, 14 percent to other European countries, 20 percent to North America and 17 percent to Asia. At the same time, Germany remains one of the world’s top importers of medical devices, bringing in EUR 22.2 billion in 2024.

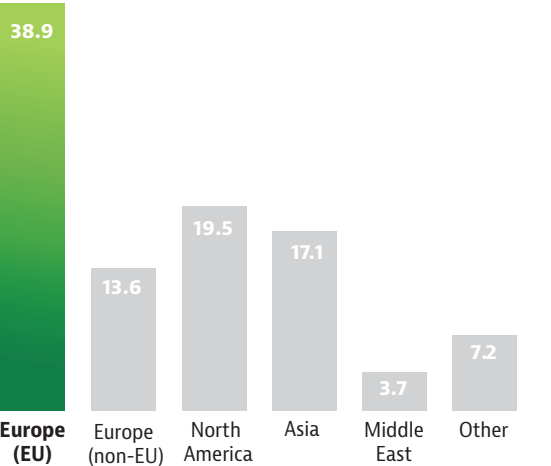
The largest suppliers were the United States (EUR 5 billion), Switzerland and China (EUR 1.76 billion respectively), followed by Ireland (EUR 1.4 billion) and the Netherlands (EUR 0.86 billion).

Medical Device Manufacturers in Germany

| Number of Employees | Companies | Employee Total |
|---------------------|-----------|----------------|
| 250+ | 106 | 90,742 |
| 100-249 | 165 | 25,333 |
| 50-99 | 258 | 17,853 |
| 20-49 | 951 | 27,571 |
| 0-19 | 10,000 | 104,000 |
| | | Total >265,000 |

Sources: BVMed 2025; Spectaris 2024

Gateway to Europe: German Medical Technology Exports by Destination 2023 in percent



Source: Spectaris 2024

Medical Technology in High Demand

Broad Product Spectrum

Around 500,000 different products certified under EU Medical Device Regulation (MDR) are available for purchase in the German market. While these are commonly referred to as medical technology or medical devices, the legal term in Germany is *Medizinprodukte* ("medicine products"). The landscape of medical technology and its various subsets – from imaging systems and genomic sequencers to small instruments, implants, disposables and orthoses – is anything but uniform. These products differ markedly in risk classification, technical complexity and intended use. Some are supplied directly to patients, while others are distributed exclusively to healthcare providers. Accordingly, individual market access strategies and distinctive approaches to provide patient benefit and customer service are required. All told, market volume is expected to reach over EUR 35 billion in 2025 with a projected CAGR of 3.3 percent through to 2029.

| Medical Technology Market by Product Area | Market Size* in EUR bn | Segment share of total market volume |
|---|------------------------|--------------------------------------|
| Consumables | 8.6 | 24.3% |
| Diagnostic Imaging | 6.1 | 17.1% |
| Orthopaedics & Prostheses | 4.7 | 13.2% |
| Dental Products | 3.5 | 12.3% |
| Other Medical Products | 12.7 | 35.6% |
| Total | 35.6 | |

Source: BMI - A Fitch Solutions Company Q2/2025
*GTAI USD to EUR currency calculation in EUR bn.

Medical Aids: A Distinctive Market Segment

Products to support medical treatment, prevent a potential disability or compensate for an existing disability in Germany are categorized as medical aids. In 2024, the statutory health system spent EUR 11.7 billion on prescribed medical aids. That is an increase of 6.5 percent on the previous year, when 32 million care cases were covered. In around 20 percent of those cases, patients paid an out-of-pocket share on top – averaging out at EUR 149 per person. Hearing aids were a major expenditure, with statutory health spending of almost EUR 1.29 billion, followed by respiratory aids at EUR 1.18 billion and orthoses at EUR 972 million. The vast majority of medical aids are considered medical products of low risk.

However, not all medical aids are classified as medical products. Notable examples include guide dogs for the visually impaired as well as shoes and certain bathroom appliances.

In Vitro Diagnostics - A League of its Own

Medical apparatus, accessories and supplies for testing human specimens fall under the EU's In-Vitro Diagnostic Medical Device Regulation (IVDR). This medical device segment is often regarded as being in a league of its own, since hospital laboratories, independent lab groups and doctors' offices each have distinct requirements. Overall IVD market volume in Germany is estimated to exceed EUR 3.5 billion in 2024 with CAGR projected at 1.9 percent by 2030. Research-use-only (RUO) analytical devices and labtech equipment form another distinct market segment with untapped potential. Exempt from certification as an IVD, collaborations with pharmaceutical innovators, university hospitals, and research institutes unlock additional opportunities for growth. However, with total domestic revenue of EUR 5.2 billion in 2024, the analytics and labtech industry is also active beyond the health and life sciences sectors.

Digital Health Applications - DiGAs

Recent legal initiatives are intended to increase the usage and reimbursement possibilities of digital health applications (DiGAs). This is also paving the way forward for increased access to health data for research-based companies. As of 2025, there are 58 DiGAs available on prescription. Individuals with health insurance are entitled to coverage benefits where those applications meet the following characteristics:

- Medical products of class I, IIa or IIb under MDR
- Main function is based on digital technologies
- DiGAs assist the process of detection, monitoring, treatment and alleviation of injuries and compensate diseases and disabilities
- DiGAs are used either by the patient or jointly by the patient and the care provider, which means application can solely be used for patient treatment

Healthcare System Calls for Innovation

Health Spending in Germany

Healthcare expenditure in Germany reached approximately EUR 538 billion in 2024 with a 7.5 percent increase on the previous year. This is equivalent to 12.4 percent of GDP, confirming Germany as the biggest spender on health in Europe and the number two globally behind only the USA. Statutory health insurance funds accounted for about EUR 327 billion – roughly 60 percent of all healthcare costs – while private insurers covered an additional EUR 39 billion. Within the statutory system, hospital care remained the biggest expense, climbing to a record EUR 102 billion in 2024, up 8.7 percent year-on-year. At the same time, private health insurers spent over EUR 9.4 billion on inpatient services.

Support for New Solutions

Statutory health insurers and care providers in Germany are joining forces with medical-technology manufacturers. To pilot pioneering care concepts and devices into the standard statutory system, project consortia can be formed tapping into the Joint Federal Committee's (G-BA) Innovationsfonds for financial backing. Over 700 initiatives with a total volume beyond EUR 1.7 billion have already been selected, with the *Innovationsfonds* addressing issues such as improvement of cross-sector care and digitalization of healthcare. In 2025 more than 70 statutory health funds are working with GWQ Service Plus (GWQ), a service provider founded by health insurance funds. GWQ offers a range of services, from procurement and financial management to consortium leadership in

projects supported by the *Innovationsfonds*. Diagnostic imaging is one of the company's core areas, where innovative concepts integrating diagnosis and therapy have been successfully implemented. These include advanced CT and MRI solutions for diagnosing and treating coronary heart disease (CHD), Germany's most frequent cause of death, and multiparametric MRI for prostate cancer, the most common cancer among men.

GWQ Service Plus also runs its own platform, "Fast Forward – Next Level Healthcare," which invites start-ups, companies, and health insurers to pitch and co-create new healthcare solutions. Major players in the hospital sector often take a similar path. Sana Kliniken AG for instance: with over 50 hospitals, it's one of Germany's largest for-profit hospital groups and it routinely partners with manufacturers and start-ups on pilot projects. Key focus areas include connected devices like sensor applications and robotics as well as clinical decision-support solutions. Germany's largest university hospital, the Berlin Charité, tackles the gap between medtech innovation and clinical practice through its CEED platform (Consulting, Evaluation, Education, Drive). Among its top innovation priorities are advanced diagnostic imaging, surgical robotics and XR augmentation, and telemedicine.



Some 30 million people have opted for additional private health insurance to expand scope and quality of cover.

Hospital Infrastructure

In 2024, Germany's hospital sector comprised 1,853 hospitals – including 37 university hospitals – and employed over 228,000 physicians. During that year, more than 17 million patients received inpatient care, with an average stay of 7.2 days. Reflecting an "ambulatorization" trend, three quarters of these hospitals also run ambulatory care centers, enabling treatment without overnight admission.

Ambulatory Landscape

In the same year, roughly 171,000 physicians practiced in the ambulatory sector, with about two thirds working independently and the remainder as salaried staff. Nearly 100,000 medical practices accept patients covered by statutory health insurance, while only a small number serve exclusively privately insured clients. Dental medicine leads the field with around 40,000 practices, followed by general practitioners, internists, and gynecologists.

Regulatory Framework and Reimbursement

MDR CE Certification Under Construction

Medical technology manufacturers seeking to sell in the EU are required to declare conformity to European Union legislation (*Conformité Européenne* - “CE”) for those products. The European Medical Device Regulation (MDR), effective since May 2021 and successor to the European Medical Device Directive (MDD), must be complied with. However, some products certified under MDD can still be marketed as late as end of the year 2028. Transition periods for such legacy products were introduced allowing manufacturers time to align with the updated standards.

A number of issues have been resolved according to government and industry representatives alike, most notably the shortage of MDR-accredited notified bodies. In October 2024, the European Parliament adopted a resolution calling for a comprehensive review of the Medical Device Regulation. From December 2024 through spring 2025, a public consultation invited citizens, healthcare providers, and industry stakeholders to evaluate the MDR’s efficiency, effectiveness, and relevance. In March 2025, the EU Commission confirmed its plans to revise the MDR framework in terms of bureaucracy, complexity, long terms and high costs as well as general mode of operations of notified bodies.

German Medical Device Regulation (MPDG)

The implementation of the European MDR in 2021 required German national medical product regulation to be adapted. This led to the creation of the *Medizinproduktedurchführungsgesetz* – MPDG (“Medical Product Implementation Law”) to implement MDR and revise existing requirements across ten chapters and ninety-nine sections.

Among the most evident national requirements are five ordinances, e.g. the medical devices operator’s ordinance (MPBetreibVg) defining requirements for maintenance, technical check-ups of devices, and operator training. Another specific requirement is the role of a *Medizinproduktberater* (“Medical Product Advisor”). Professionals who provide information or training to a specialist audience regarding medical products are considered as being medical product advisors. As such, they are required to receive continuous training as well as provide training documentation.

Reimbursement

Reimbursement in Germany is regulated by the Social Insurance Code 5 (SGB 5) and the Joint-Federal Committee’s (G-BA) rules of procedure. The G-BA is a public sector entity comprising the four leading umbrella organizations of the self-governing German healthcare system: the respective national associations of statutory health insurance physicians and dentists, the German Hospital Federation, and the Central Federal Association of Health Insurance Funds. Patient representatives attend every G-BA session and may propose topics for discussion, though they do not have voting rights. In its bylaws and rules of procedure – both of which must be approved by the Federal Ministry of Health (BMG) – the G-BA defines the details of diagnostic and therapeutic method assessment and the framework of the scope of services in the inpatient and outpatient sectors.

Inpatient Sector

In the inpatient sector, most medical devices are reimbursed via the German DRG system and its fixed budgets. Apparatus with long-term use of over three years however are funded separately. Novel diagnoses and treatment methods can be reimbursed by the health insurance system based on existing DRGs, provided the method of device use has not been explicitly restricted by the G-BA (§ 137 c SGB).

Hospitals and innovative device manufacturers can claim *Zusatzentgelte* – supplementary payments on top of standard DRG rates. Another option commonly followed is the *Neue Untersuchungs- und Behandlungsmethoden* (NUB) track for novel diagnoses and treatment methods offering increased reimbursement through innovation-related extra rates. A successful NUB application may even lead to the creation of a dedicated DRG code, fully integrating the innovation into the DRG system. Section 137h of SGB V mandates that any high-risk innovation in medical product methods undergo a formal, evidence-based assessment before it can be reimbursed. While it is not required to run clinical trials within Germany, there is an option of providing clinical evidence in specific cases within a coverage-with-evidence-development trial based on §137e SGB, funded by G-BA.

Outpatient Sector

In the outpatient sector, methods of diagnosis and treatment are assessed based on §135 SGB V. Unlike the inpatient sector, novel diagnosis and treatment methods must always be assessed and approved before being reimbursed. The G-BA’s assessment committee examines the diagnostic or therapeutic benefit of the new diagnosis or treatment, medical necessity and economic viability.

Upon approval, a new method may be added in the ambulatory devices catalogue *Einheitlicher Bewertungsmaßstab* (EBM - “Uniform Evaluative Standard”). At that point, a unique EBM code is assigned, allowing both the method and its associated device to be reimbursed by the statutory health insurance system.

The G-BA as well as the EBM committee offer consultation procedures to determine whether the device offers a new method or “simply” a new service not subject to the HTA at G-BA. In cases where merely a new service is being offered, the new service can be added into the EBM directly, e.g. upon application from a medical or industry association. In the private health insurance sector, reimbursement falls under the GOÄ (*Gebührenordnung für Ärzte*) and GOZ (*Gebührenordnung für Zahnärzte*). With one statutory and one private health reimbursement system in place both payment levels and the range of billable services can differ significantly.

Outlook: Hospital Reform

In 2024, Germany’s Federal Ministry of Health initiated a legislative reform of the German hospital sector (*Krankenhausversorgungsverbesserungsgesetz* - KHVVVG) that is expected to have significant effects. Despite coming into effect in December 2024, full implementation is expected to take until the year 2030, with several main ordinances yet to be issued. The reform’s primary objectives are to elevate care quality, provide access to care nationwide, boost operational efficiency, and streamline bureaucracy. To back these efforts – modernizing facilities, digitalizing processes and restructuring capacity – a EUR 50 billion transformation fund has been established. Some of the most notable changes can be seen in the info box.

Assigning Service Groups to Hospitals

The reform requires the 16 German states to assign service groups (*Leistungsgruppen*) to every hospital. This is to be based on quality criteria including staffing levels, technical equipment and minimum case volumes. As a result, some smaller hospitals are likely to discontinue specific treatments, transferring patients to larger or specialised hospitals.

Categorising Hospitals as Level 1i, 2, 3 and 3U

Depending on the service group levels, hospitals will be categorized as care provider tiers – Level 1i, 2, 3 or 3U (*Versorgungsstufe*). Often to be seen in more rural areas, Level 1i hospitals are designed as sector-overlapping facilities offering ambulatory treatment as well as nursing care with geriatrics and internal medicine as inpatient capacity. They can also partner with Level 3 or 3U hospitals to provide additional services.

Budgets to Partially Replace DRG Lump Sums

To reduce financial incentives of high case numbers, many larger and specifically maximum care facilities such as university hospitals are to discontinue part of the accounting based on DRG lump sums per case. Instead, these facilities will receive advance budgets that are not tied to individual case numbers (*Vorhaltefinanzierung*), ensuring more predictable funding. This shift aims to reward capacity and readiness rather than sheer patient throughput, encouraging hospitals to focus on quality and the necessity of care.

Hospital Reform: Key Aspects Implementation by 2030

- Assignment of service groups to hospitals
- Categorization of hospitals (levels 1i, 2, 3 and 3U)
- Advance budgets to partially replace DRG lump sums

Working with Medical Technology Clusters in Germany

Germany is home to some 50 cluster networks active in medical technology.

Their goal is to achieve continuous innovation in research and development as well as in manufacturing by connecting companies, hospitals, universities, and other research institutions. Dedicated cluster management teams help obtain funding for joint R&D projects, provide shared facilities and organize educational training programs for their members.

Finding partners made simple

Germany Trade and Invest (GTAI) can support international companies by identifying and contacting

partners for research and development. Key opinion leaders in the clinical setting are an approachable part of the innovation ecosystem. Matching partners and service providers can also be found to assist with product certification, reimbursement procedures and product development.

GTAI cluster network survey

A 2024 GTAI survey found that digital health, diagnostics, medical imaging and implants were the most frequently cited fields of activity.

Best Practice Example: Panthera Dental

Germany Trade & Invest provides a range of free inward investment services to international investors.

After careful consultation with the individual investor, a support program of consultancy and information services - including market analysis, tax and legal information as well as partner and site selection - is provided. This all helps set the stage for investment success in Germany.

Panthera Dental

Headquartered in Quebec, Canada, Panthera Dental is a family-owned leader in digital dentistry committed to the automated manufacturing of dental and medical prosthetic products and dental sleep appliances. Using proprietary CAD/CAM manufacturing processes and superior quality materials, the company develops individualized patient solutions for healthcare professionals. These solutions are intended for dental restorations, cranio-maxillofacial surgeries and the treatment of sleep-breathing disorders to significantly improve the health and quality of life of each individual patient.

The company numbers approximately 7,500 customers including internationally renowned academic institutions and university hospitals in 35 countries.

Product Information

Panthera Dental follows Industry 4.0 automated manufacturing principles to produce a diverse portfolio of dental and medical products. Products produced using advanced CAD/CAM, additive manufacturing and high-speed five-axis milling processes include advanced dental implant bars and bridges, custom subperiosteal implants and drop-in fit dental sleep appliances.

Project Information

Panthera Dental established the Panthera Dental Germany GmbH subsidiary in Ostfildern, Baden-Württemberg, in 2023. The creation of the German company allowed Panthera Dental to solidify its commitment to Germany and Europe. The creation of a base of operations in Baden-Württemberg allows Panthera Dental to provide closer support to partners and customers and provide sales, customer service and logistical support across the country.

“Establishing our German subsidiary and partnering with a renowned German manufacturer for the distribution of our products are pivotal steps in our European growth strategy. Germany represents a market of innovation and quality, which perfectly aligns with our values. We are committed to providing the German dental community with direct access to our state-of-the-art solutions. The support from GTAI – and the Canadian Trade Commissioner Service – has been invaluable in helping us lay the foundation for long-term success here.”

Gabriel Robichaud, CEO and co-founder, Panthera Dental

Location Advantages

Since establishing its German operations in 2023, Panthera Dental has pursued a dual market-expansion strategy that focuses on its two “sleep” and “prosthetics” core divisions. Panthera has sought to develop the market directly with a dedicated on-site team and lab partners in order to grow its sleep division. Panthera Dental also formed a commercial partnership with VITA Zahnfabrik (leading manufacturer of dental materials) in the prosthetics sector. The agreement makes VITA Zahnfabrik the sole distributor of Panthera Dental prosthetic products in Germany and other key European markets. The company’s two-pronged approach leverages both strategic partnerships and direct engagement to reinforce Panthera Dental’s long-term investment commitment to Germany as the central hub for all of its European activities.

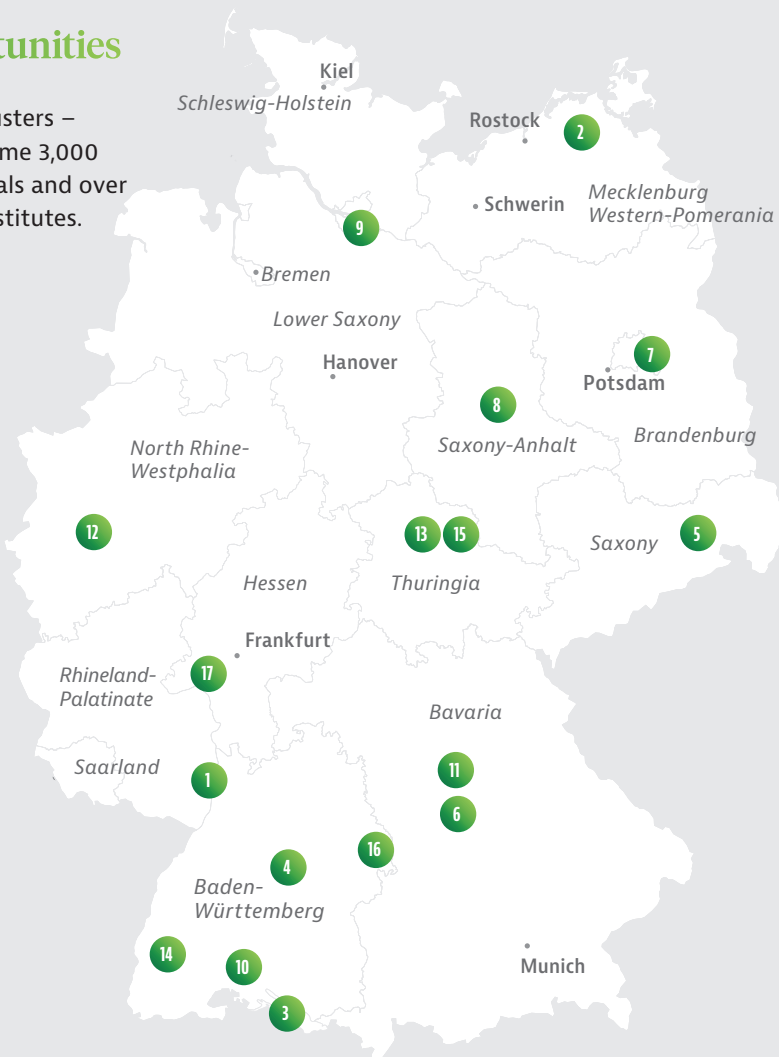
Medtech Partnering Opportunities



Seventeen medtech-focused clusters – representing an affiliation of some 3,000 companies, 37 university hospitals and over 100 universities and research institutes.

Cluster Networks

- 1 5-HT Chemistry & Health
- 2 BioCon Valley®
- 3 BioLAGO
- 4 BIOPRO
- 5 biosaxony
- 6 Innovationsnetzwerk Gesundheit Bayern Innovativ GmbH
- 7 HealthCapital Berlin Brandenburg
- 8 innoMed
- 9 Life Science Nord
- 10 MedicalMountains GmbH
- 11 Medical Valley EMN
- 12 Medizin.NRW
- 13 medways
- 14 microTEC Südwest
- 15 OptoNet e.V.
- 16 Photonics BW
- 17 Technologieland Hessen



Source: GTAI Cluster Survey 2024

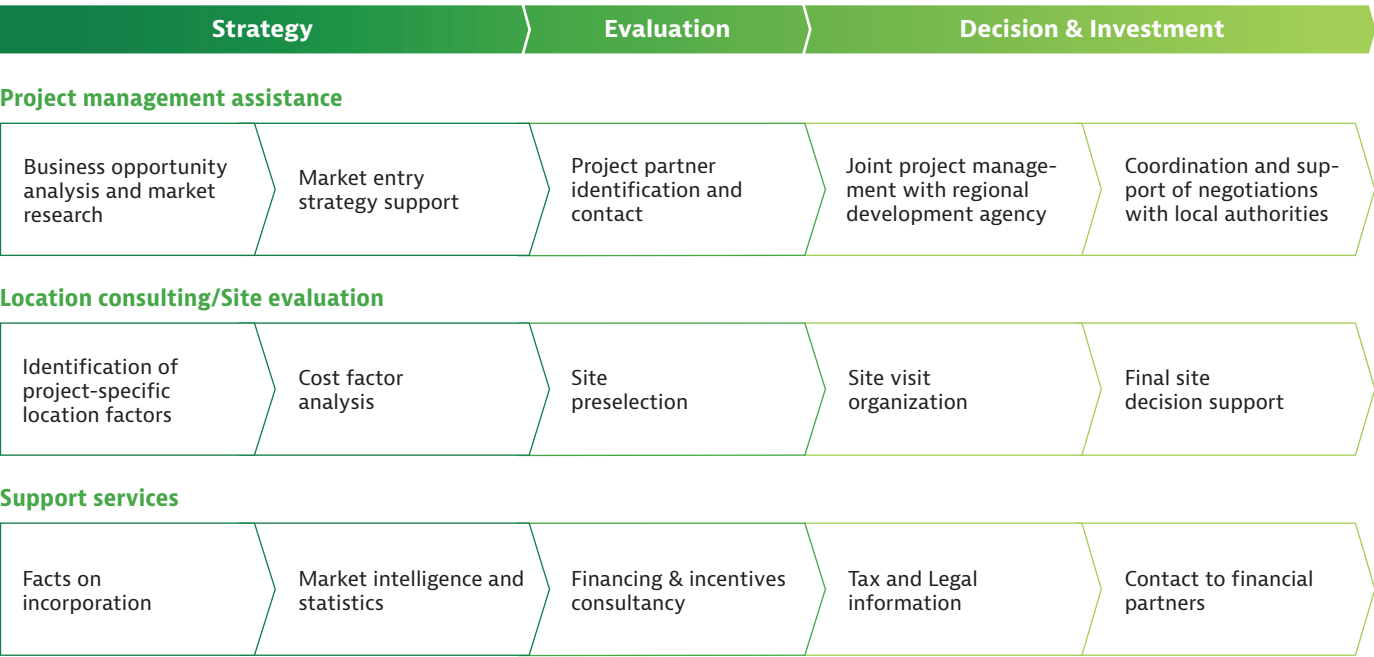
Germany Trade & Invest Helps You

Germany Trade & Invest's (GTAI) teams of industry experts will assist you in setting up your operations in Germany. We support your project management activities from the earliest stages of your expansion strategy.

We provide you with all of the industry information you need – covering everything from key markets and related supply and application sectors to the R&D landscape. Foreign companies profit from our rich experience in identifying the business locations which best meet their specific investment criteria. We help turn your requirements into concrete investment site proposals; providing consulting services to ensure you make the right location decision. We coordinate site visits, meetings with potential partners, universities, and other institutes active in the industry. Our team of consultants is at hand to provide you with the relevant background information on Germany's tax and legal system, industry regulations, and the domestic labor market. Germany Trade & Invest's experts help you create the appropriate financial package for your investment and put you in contact with suitable financial partners. Our incentives specialists provide you with detailed information about available incentives, support you with the application process, and arrange contacts with local economic development corporations.

All of our investor-related services are treated with the utmost confidentiality and provided free of charge.

Our support services for your investment project



Investor Consulting



Gabriel Flemming is a senior manager for medical technology products and services in Germany Trade & Invest's Chemicals & Healthcare team. He advises and provides support to international healthcare and life science companies seeking to set up operations in Germany. He previously worked as a technology scout for an IP firm managing German patent value funds.

For questions on how to establish your business in Germany please contact Gabriel Flemming at gabriel.flemming@gtai.de

For more information about the machinery & equipment industry in Germany, please visit our website www.gtai.de/medtech

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About Us

Germany Trade & Invest (GTAI) is the international economic promotion agency of the Federal Republic of Germany. We provide German companies with a wide range of information and assistance to do business in markets abroad. We help international companies expand to Germany, strengthening the resilience of the German economy. Additionally, GTAI publicizes Germany as a business location in other countries and supports the internationalization of German regions undergoing structural change. We maintain a global presence and help bolster Germany as a business location in the long term with our expertise, services and assistance.



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