# Public Opinion on the Current and Future Situation of Medical and Healthcare Supply Stores

ZUKUNFTS
BAROMETER
SANITÄTSHAUS 2026

Which developments are becoming apparent - and which opportunities or challenges will emerge in the following years?

tecfor care

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# Content

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The industry views their future not at a standstill, but as the active development of their role in the system.

# Introduction

The medical and healthcare supply store industry is changing - and not just since yesterday.
Each day, healthcare supply stores face enormous tasks in this area of tension between the healthcare system, care work and supply. They are a staple of the provider landscape and often experience changes in the system as the first.

To offer a realistic impression of this situation, **tecfor care** conducted the *Zukunftsbarometer Sanitätshaus 2026* (Future Indicator Medical and Healthcare Supply Stores 2026). The survey offers not just numbers, but an indication of public opinions:
How do medical and healthcare supply stores perceive the current state of the German healthcare system?
Which developments are becoming apparent - and where do companies see opportunities or risks in the upcoming years?
The survey was answered by medical and healthcare supply stores all across Germany. They offered glimpses into their daily realities.

The study is organized into four topic areas:

**I. Evaluation of the current system**
How stable is the German healthcare system assessed, and which role do medical and healthcare supply stores play in the system?

**II. Future of the system**
Which developments are expected in the next five to ten years?

**III. Worst-case scenarios**
How realistic is an in-depth crisis, and how well prepared are medical and healthcare supply stores?

**IV. Trends and perspectives**
Which chances and driving forces affect the future of care and aid supply?

The **Zukunftsbarometer Sanitätshaus 2026** thus shows not only numbers but an indication of the opinion of an industry between stability and change - and it hints at the upcoming developments of medical and healthcare supply stores in the following years.

# About tecfor care

tecfor care Ltd develops and produces care beds, comfort beds and accessories for different care and usage areas since 2006. The focus are high durability for the standard, sustainable constructions and a well-thought-out design. Components are created to last for several usage cycles, keeping the need for spare parts across the entire life cycle low. For our customers, this creates economic continuity. The beds are designed for long-term use, with measurable expense and consciously reduced component complexity.

Different widths and equipment versions allow a structured reproduction of different requirements within a clear system.
Unique within the market is the consistently developed free sales concept. The standard product forms the stable foundation and can be specifically upgraded through functional extensions, comfort and design elements. This creates additional potential turnover, while users receive real opportunities of choice and individual added value.

Additionally, ultra comfort beds with a health-oriented aim are created through the combined competences oft wo worlds, functional epertise of the care area and proven know-how of a specialist for upholstered and comfort beds. As a result, design, high lying comfort and expanded position opportunities combine with functional precision. A segment that opens up new market opportunities and that noticeably differentiates itself from the traditional furniture and specialty trade.

For users, it creates safe, comfortable and adjustable solutions. For our clients, this creates a portfolio geared for sustainability, expandability and sustainable economic efficiency.

# Presentation of results

In the following section, the results of the survey will be systematically prepared and presented in a clear manner. The analysis shows major tendencies, prominent patterns and differences, and put them into the context of this survey.

# Section I

## Assessment of the current system

### Question 1

*“How do you evaluate the stability of the German healthcare system?”*

The answers of the medical and healthcare supply stores leave little room for euphemisms.
**Around two thirds** of those questioned evaluate the German healthcare system as **unstable**. **57 %** of those assess the situation as *somewhat unstable*, another **12 %** even say it is *very unstable*. Only **31 %** think the system is *somewhat stable*. No medical and healthcare supply store evaluated it as *very stable*.
This distribution shows a clear attitude: Stability is no longer taken as a given.
The valuation as slightly stable does not signify trust as much as an assessment of the current functionality. The system still functions, but it does not convince.
Already a central tension becomes visible:

*The supply is working, but the sustainability of the system is clearly being questioned.*

This scepticism forms the basis for the following assessments in the future indicator, and impacts the industry’s view of the upcoming years.

unstable 1 — 2 — 3 — 4 — 5 stable

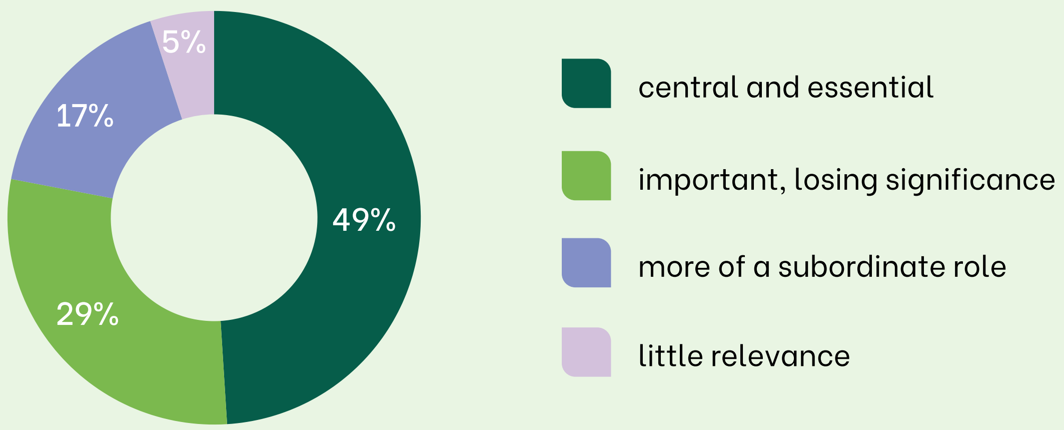
2,5 von 5

**Over two thirds of medical and healthcare supply stores view the healthcare system as unstable.**

## Question 2

*"In your opinion, which role do medical and healthcare supply stores currently play in the healthcare system?"*

### Role of medical and healthcare supply stores




**49 %** view their role as *central and essential*, an additional **29 %** perceive their role as *important*, but as *increasingly losing significance*. For **17 %** of those questioned, medical and healthcare supply stores play *more of a subordinate role*, **5 %** perceive their function as carrying *little relevance*.

These results illustrate a noticeable ambivalence in the perception:
On the one side, there is a high level of awareness of their supply importance - medical and healthcare supply stores perceive themselves as reliable partners for patient-centered care.
On the other side, it becomes apparent that many businesses consider their position in the system to become increasingly under pressure, caused by narrow systems of remuneration and complex regulations, which increasingly restrict economic room for manoeuvre.
Overall, it becomes clear that medical and healthcare supply stores make a central contribution to the security of care. However, their significance is not sufficiently acknowledged within the context of health policy and economy. The discrepancy between actual performance and structural acknowledgement thus considerably influences the industry's current self-image and underlines the wish for more visibility and a stronger embedment of their contribution to healthcare supply within the system.

# Section II

## Future of the system

### Question 3

*"How will the healthcare system develop in the next five to ten years?"*

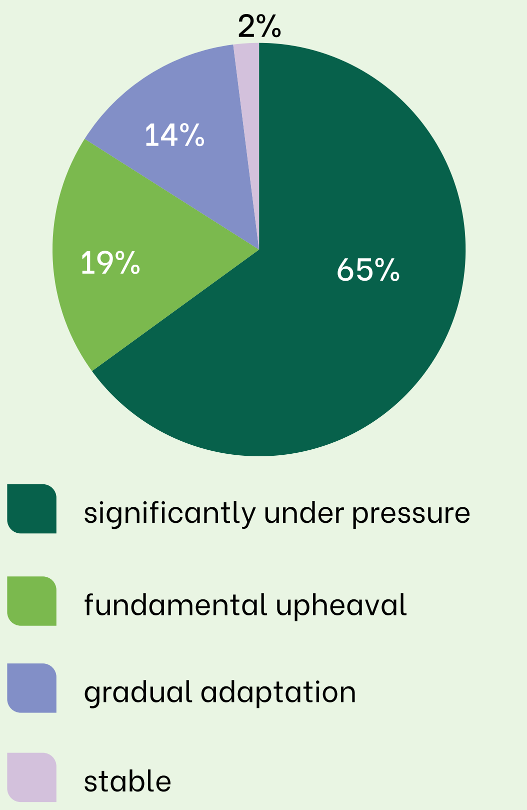
Those questioned notice a growing structural and financial tension stemming from both the political framework, cost developments and the demographic change. The confidence in the system's dependability remains low - the future is viewed first and foremost as a time of transition, not of consolidation.

Overall, it can be noticed that:

> *The industry perceives the German healthcare system at a turning point.*

The upcoming years are understood less as a continuation of the existing, but instead as a phase in which stability is defined anew, and in which structures need to be fundamentally questioned.

**Development of the healthcare system**




**65 %** **2 %** These assessments illustrate a growing awareness for the pressure for reform within the healthcare system.

## Question 4

*“Which changes do you expect within the next five years?”*

The respondents were asked to assess potential developments within the healthcare system on a scale from **1 = highly unlikely** to **5 = highly likely**.

The result paints a clear picture:

**The industry expects noticeable structural changes.**

As particularly likely are seen an increase of **co-payment**, more limitations by **public healthcare providers**, as well as a **growth of free sale** and **digitalisation**.
With an average of **4.2**, these trends are assessed as highly likely.
The significance of **private supplementary insurances** is also perceived as increasingly relevant (average **3.9**).

The answers illustrate that medical and healthcare supply stores provide a realistic assessment of the change within the financing system: Services that used to be paid fully by public healthcare providers will be financed more strongly through individual and private co-payments in the future.

> *Free sale is thus developing from an additional trading area into an important part of the medical care situation - not as an alternative to public healthcare coverage, but as an opportunity to reconciling freedom of choice and quality of care.*

At the same time, **digitalisation** is understood as a key requirement for designing consultation, service and processes to be more efficient.
Many businesses thus combine the opportunity to intensify their contact with clients and open up new ways of care.

> **Free sale is increasingly perceived as an integral part of care models.**

All in all, the impression coming into being is that of an industry that does not simply expect structural change, but one that is actively reacting to it: with stronger customer ties, new digital offers and an increasing consciousness for entrepreneurial independence within the system.

The answers clearly show: The industry anticipates noticeable structural changes.

| Change | Average value | Assessment |
|---|---|---|
| increase of co-payments | 4.2 | highly likely |
| restrictions through public healthcare providers | 4.2 | highly likely |
| growth of free sales | 4.2 | highly likely |
| increase in digital offers | 4.1 | likely to highly likely |
| increasing significance of private supplementary insurances | 3.9 | likely |

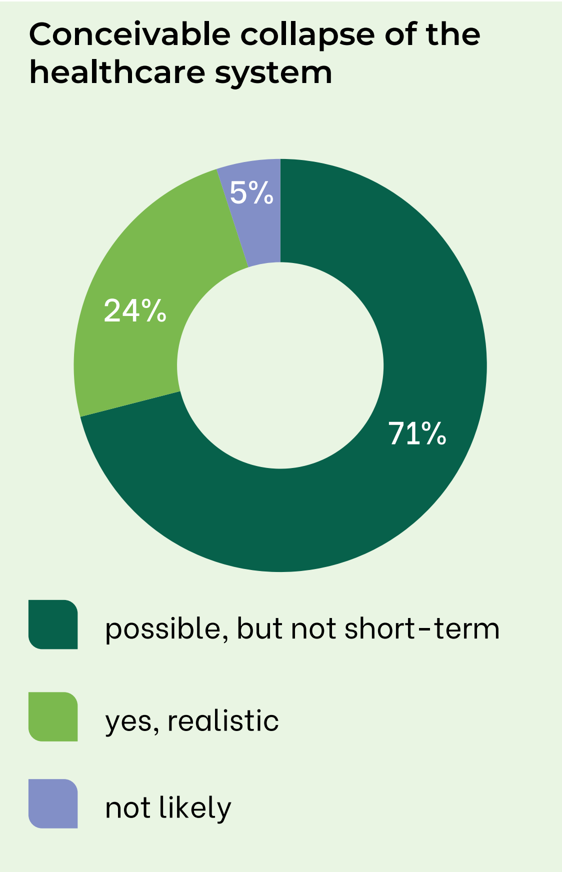
# Section III

## Worst-case scenarios

### Frage 5

*“Do you regard a collapse of or a profound crisis of the healthcare system as possible?”*

In principle, a potential collapse or a far-reaching crisis of the healthcare system is perceived by the clear majority of respondents as not impossible.
**71 %** of the medical and healthcare supply stores regard such a scenario as possible, though not in the short-term perspective. 24 % evaluate it as a realistic development, while 5 % assess a collapse as unlikely.
These assessments illustrate an increasing consciousness for the structural capacity limitations of the system. While the current functionality is acknowledged as a given, many businesses notice signs of a growing instability - because of the demographic change, increasing costs and the lack of reform in central care structures.



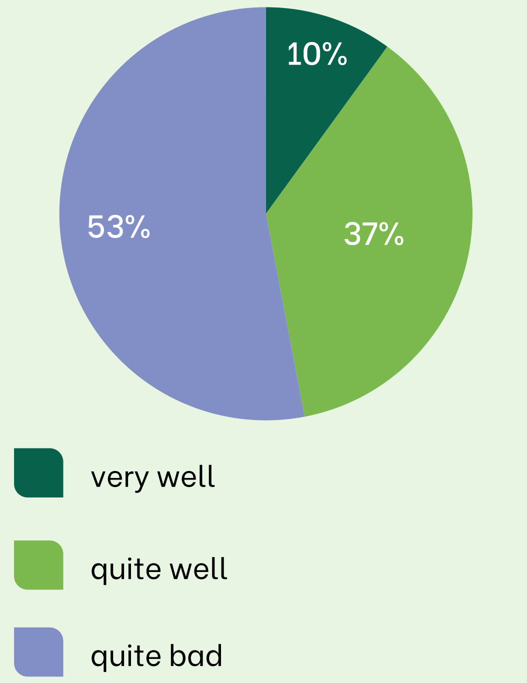

> *The confidence in the short-term stability remains; simultaneously, the realization dawns that, without fundamental reforms, a critical point could be reached medium-term.*

It seems like the industry looks to the future with realistic worries, but not with alarmism.

## Question 6

*“In case of an upheaval or crisis: How prepared would your medical/healthcare supply store be?”*

**Prepared for a crisis**




Only a few of the medical and health-care supply stores view themselves as well equipped in case of a potential crisis. More than half of the interviewees (**53 %**) assess their level of preparedness as *quite bad*. **37 %** think they are *relatively well* prepared, while only **10 %** claim to be *very well* prepared.
This creates an overall image of a limited degree of crisis resilience: Many stores have a steady every-day organization, but strategic alternatives, crisis plans or structured risk-prevention is seldomly established. The industry therefore stands before potential changes within the system without having comprehensive and prepared options for action. This self-assessment underlines the necessity for a stronger future understanding of crisis-capability as a part of business mangagement, not just as a short-term reaction, but as part of sustainable, strategic planning. Clearly visible is also a positive aspect:

> *A growing amount of medical and healthcare supply stores recognizes the need for action and is starting to develop structures in order to specifically prepare for potential upheavals.*

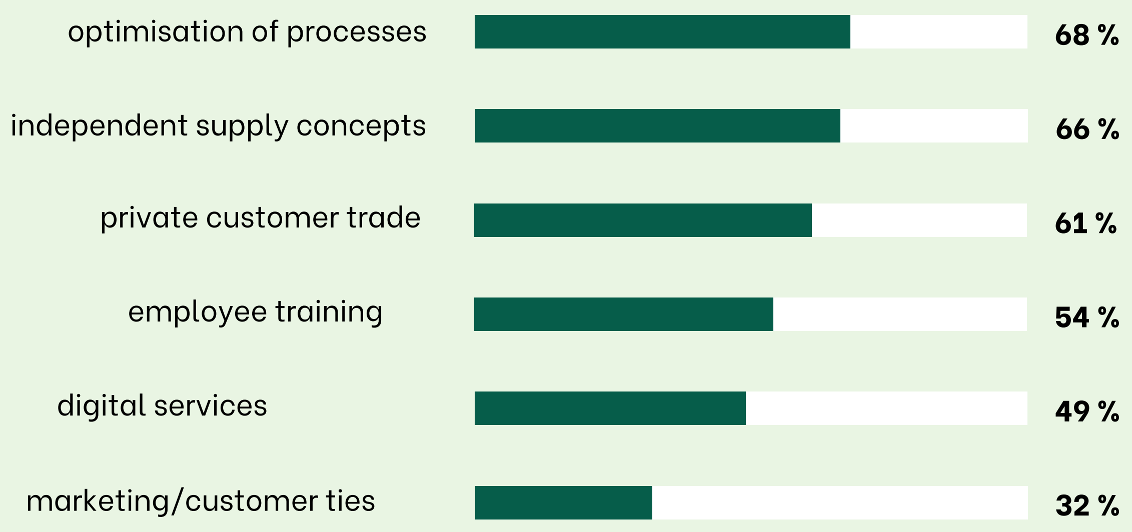
It is becoming increasingly apparent that economic stability within the care market does not solely comprise system compensations. Many stores nowadays focus on an extended performance orientation - with strong, durable products as the standard and additional offers that meet the increasing needs of older persons regarding comfort, design and autonomy. This development shows that the path to greater independence often begins where quality of care, customer proximity and entrepreneurial spirit come together.

## Question 7

*“Which measures do you deem necessary in order to become more independent from the healthcare system as a medical and healthcare supply store?”*

For this question, multiple answers were allowed.
**Results** (in % of mentions):

**73%** view free sale and additional products as a necessary measure




This distribution clearly shows:
Medical and healthcare supply stores increasingly understand economic independence as a result of **large-scale transformation processes**. Apart from more efficient procedures, **inde-pendent supply concepts and addi-tional services** are gaining more significance. These strategies go be-yond simple case-compensation supply, and open up new possibilities to economy and customer proximity.

It is important to note that many stores see an opportunity to define their role within the market **more by quality, consultation and individualisation**.
The perception of care thus shifts away from a complete system-driven service provision to a **client-centered, value based supply**, one where comfort, design and function are increasingly understood as part of the quality of care.

# Section IV

## Trends and perspectives

### Question 8

*"Which trends do you see as the most important driving forces for the future of care and medical aid remuneration?"*

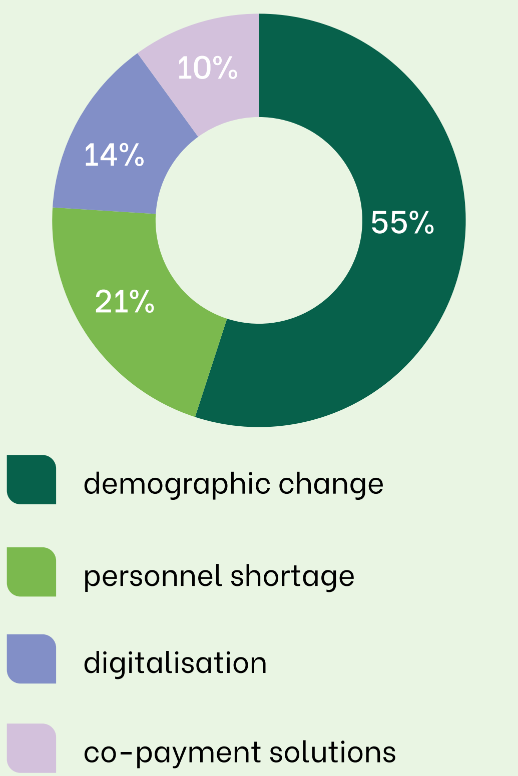
The interviewed medical and health-care supply stores name the **demographic change** (**55 %**) as the most important driving force; a development that fundamentally changes both the need for health aids as well as the requirements for care and consultation.
In second place is the **shortage of qualified personnel** with **21 %**, followed by **digitalisation** (**14 %**) and **co-payment solutions** (**10 %**).

These results illustrate

> *that the industry perceives the biggest challenges in the structural changes of society.*

An aging population, an increasing number of people in need of care and limited personnel resources will strongly leave their mark on care supply systems in the following years.
At the same time, technological developments and individual willingness to pay open up new ways of closing supply gaps and designing more fitting offers.

**Important future fields**



It is noteworthy that, while digitalisation is perceived as relevant, it is not understood as a dominant trend. This is an indication that technological innovation is taken as effective especially when it is embedded in practical, suitable-for-every-day care concepts.

This confirms that:

> *The future of health aid supply is determined through demographic realities, personnel development and intelligent offer models. Not through individual trends, but through their interplay.*

## Strengthening of one's own room for maneuvre

*Medical and healthcare supply stores see the path to more independence mainly in additional revenue models, more efficient procedures and independent care and supply concepts. The focus lies less on individual measures, but more so on an extensive strategic development.*

*It becomes apparent that it is not about a radical break from existing structures, but about a gradual strengthening of the individual ability to act.*

*Suitability for daily use, fair collaboration and a clear understanding of the economic realities form the basis for this process.*
*In this way, development emerges out of experience: pragmatic, responsibly and with regard to a long-term sustainable care supply.*

## Question 9

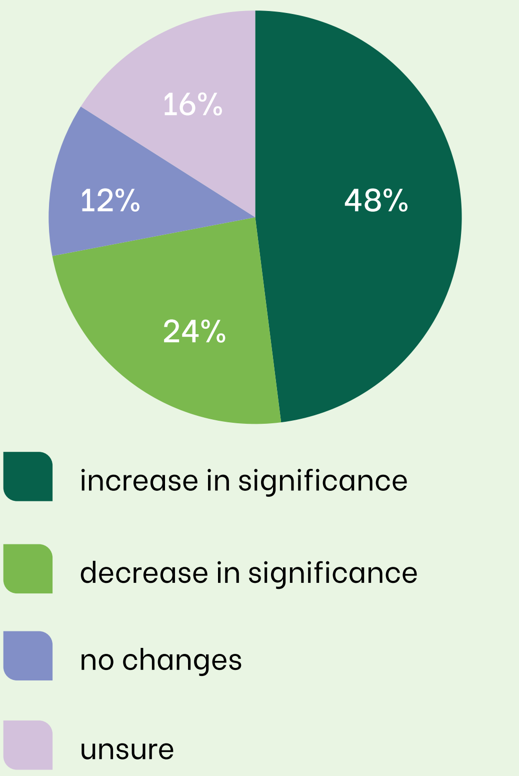
*"Which development do you expect for the role of medical and healthcare supply stores within the next ten years?"*

Regarding the future development of the industry, a **moderately optimistic expectation prevails**.

> *Almost half of the questioned medical and healthcare supply stores (48 %) expect an increase of significance or new scopes of duties for their work within the upcoming years.*

By contrast, **24 %** fear a *decrease in significance*, while **12 %** predict no *noticeable changes* in significance. **16 %** are *unsure* how the role on medical and healthcare supply stores will develop long-term.

**Future role of medical and healthcare supply stores**




The result indicates that the industry is looking ahead with a confidence in their ability to adapt, despite economic and regulatory challenges.
It also becomes evident that this optimism is combined with **structural insecurities** in relation to **financing**, **personnel recruitment** and the **role of digital processes**.
Nevertheless, it remains noticeable that:

**Medical and healthcare supply stores see their future not as a simple continuation of the status quo, but as active contributers of a changing care supply environment.**

# Future in balance - where medical and health-care supply stores see opportunities and challenges

## Question 10

*"When thinking about the future of the healthcare and care system - what do you consider to be the biggest opportunity, and what the biggest challenge for medical and healthcare supply stores?"*

This open question received a multitude of responses reflecting a wide range of expectations and fears.

> *Many perceive the demographic change and the connected increase of demand for health aids and care offers located nearby as the biggest opportunity.*

The movement to out-patient care, the free sale, digitalisation and the specialisation are also oftentimes named as perspectives meant to strengthen one's own position within the industry and to develop new business models.

These are contrasted with the major challenges, which are attributed especially to the structural framework of the healthcare system.

The lasting **cost pressure of public healthcare providers**, the **shortage of qualified personnel**, an increasing **market concentration**, a growing **online competition** as well as a **heavy burocratic burden** are mentioned.
Many interviewees emphasise the economic and regulatory pressure limiting the flexibility of businesses and jeopardising the quality of care long-term. Overall, a realistic but constructive view of the future is presented:

**+ opportunities**

- demographic change
- out-patient care
- free sale and additional offers
- digitalisation
- specialisation

**— challenges**

- cost pressure of public healthcare providers
- shortage of qualified personnel
- market concentration
- online competition
- burocracy

# Future in balance - where medical and health-care supply stores see opportunities and challenges

Medical and healthcare supply stores recognize the change to be inevitable, but they see their opportunities where they have creative leeway: in **consultation**, **specialisation** and **new care supply paths**.

> *The connection between a qualitatively strong standard care and individual additional services are increasingly understood as the key to gaining independence and strengthening one's role within the system long-term.*

The future vision is clearly ambivalent: The risks mentioned by many medical and healthcare supply stores are perceived as external conditions which can hardly be influenced. Cost pressure, burocracy and market changes are not understood as temporary effects, but as lasting side effects of the upcoming years.

This assessment is accompanied by the worry that economic and regulatory burdens might further limit individual medical and healthcare supply stores' room for manoeuvre.

Simultaneously, a clear contrast to these fears emerges within the answers. Many medical and healthcare supply stores see their opportunities in factors that they themselves can influence: in the proximity to the person receiving care, in additional service offers and in new care supply approaches aside from standardised procedures.

The open question thus illustrates that the industry is not ignoring risks, but is instead consciously setting them against their strong points. The future is understood less as secure planning, but as a process requiring active decisions, ability to adapt and entrepreneurial insight.

# Conclusion

## The most important infos put briefly

The *Zukunftsbarometer Sanitäts-haus 2026* (Future Indicator Medical and Healthcare Supply Stores 2026) shows a changing industry:
between the security of proven care supply structures and the challenges of a changing healthcare system.
While the system is still seen as stable, many medical and healthcare supply stores expect increasing pressure, structural changes and new challenges in the upcoming years.

> *The majority of medical and healthcare supply stores faces the future optimistically, with the conviction that the future will not signify crisis as much as transformation.*

## Detailed contextualisation

The *Zukunftsbarometer Sanitätshaus 2026* creates the image of an industry between **stability and system change**.
Although the German healthcare system is currently largely seen as functioning, many of the interviewed medical and healthcare supply stores expect a **phase of substantial strain, if not a fundamental upheaval** in the following years.
A collapse is not seen as impossible, with many medical and healthcare supply stores feeling **insufficiently prepared**.

At the same time, a **transformative attitude** prevails:
The future is not taken as a crisis, but as a necessary period of change where adaptation, independence and innovation become the central factors for success.
It becomes apparent that medical and healthcare supply stores **continue to play a key part** in care supply, meanwhile their position within the system is coming more and more under economic and structural pressure.

*The Zukunftsbarometer 2026 shows: The direction is open, but change is already happening.*

The sustainability significantly depends on the success of positioning oneself **more independently from the traditional public healthcare system**, developing new revenue models and **modernising internal structures**.

Key areas for this development are free sale, digitalisation, process optimisation and independent care supply concepts that allow a connection between economic stability and increasing the quality of care supply.

This illustrates that sustainability is not so much a question of system requirements, but of entrepreneurial stance:
Medical and healthcare supply stores that understand change as an opportunity and act strategically could profit off of the increasing needs of an aging population in the long-term.

Whoever clings to outdated structures, however, risks relevance loss in the long run. Overall, the industry thus stands at a decisive turning point - between growth potential and structural risk, between preservation and creation.

In spite of all described burdens, it becomes apparent that medical and healthcare supply stores do not act as driven by the system, but as experienced players who consistently uphold care supply, despite difficult conditions.
Especially this down-to-earth attitude illustrates that the industry will remain an integral part of the care landscape - not in spite of hindrances, but because it has learned to deal with them.

> Stable care emerges where solutions work in everyday life, strong partnerships grow and innovation is conceived in a practically-oriented manner.

# Appendix

**Overview of result details**

Complete preparation of the quantitative results of the Zukunftsbarometer Sanitätshaus 2026

## Question 1

*"How do you evaluate the stability of the German healthcare system?"*

- Very stable: **0%**
- Somewhat stable: **31%**
- Somewhat unstable: **57%**
- Very unstable: **12%**

Average score (Scale: 1-5): **2,5**

## Question 2

*"In your opinion, which role do medical and healthcare supply stores currently play in the healthcare system?"*

- Central and essential: **49%**
- Important, losing significance: **29%**
- More of a subordinate role: **17%**
- Little relevance: **5%**

## Question 3

*"How will the healthcare system develop in the next five to ten years?"*

- Significantly under pressure: **65%**
- Fundamental upheaval: **19%**
- Gradual adaptation: **14%**
- Stable: **2%**

## Question 4

*"Which changes do you expect within the next five years?"*

(Scale 1 = highly unlikely to 5 = highly likely)

- Increase of co-payments: **4,2**
- Restrictions through public healthcare providers: **4,2**
- Growth of free sales: **4,2**
- Increase in digital offers: **4,1**
- Increasing significance of private supplementary insurances: **3,9**

## Question 5

*"Do you regard a collapse of or a profound crisis of the healthcare system as possible?"*

- Possible, but not short-term: **71%**
- Yes, realistic: **24%**
- Not likely: **5%**

## Question 6

*"In case of an upheaval or crisis: How prepared would your medical/healthcare supply store be?"*

- Very well: **10%**
- Quite well: **37%**
- Quite bad: **53%**

## Question 7

*"Which measures do you deem necessary in order to become more independent from the healthcare system as a medical and healthcare supply store?"*

(multiple answers allowed)

- Free sale / additional products: **73%**
- Process optimisation: **68%**
- Independent supply concepts: **66%**
- Private customer trade: **61%**
- Employee training: **54%**
- Digital services: **49%**
- Marketing/ customer ties: **32%**

## Question 8

*"Which trends do you see as the most important driving forces for the future of care and medical aid remuneration?"*

- Demographic change: **55%**
- Personnel shortage: **21%**
- Digitalisation: **14%**
- Co-payment solutions: **10%**

## Question 9

*"Which development do you expect for the role of medical and healthcare supply stores within the next ten years?"*

- Increase in significance: **48%**
- Decrease in significance: **24%**
- No changes: **12%**
- Unsure: **16%**

## Question 10

*"When thinking of the future of the healthcare and care system - what do you consider to be the biggest opportunity, and what the biggest challenge for medical and healthcare supply stores?"*

Mentioned opportunities:

- Demographic change
- Out-patient care
- Free sale and additional offers
- Digitalisation
- Specialisation

Mentioned challenges:

- Cost pressure of public healthcare providers
- shortage of qualified personnel
- Market concentration
- Online competition
- Burocracy

The **Zukunftsbarometer Sanitätshaus 2026** shows an industry that is mindful of its challenges and, at the same time, gains optimism out of its own strength. Medical and healthcare supply stores experience the change within the healthcare system immediately, but they face it with pragmatism, experience and the willingness to change.

The results illustrate: Where suitability for daily use, collaboration and openness to different ways meet, perspectives emerge. Not as a break with the existing, but as a collective leap forward.

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