



CREATING VALUE IN
CHANGING TIMES

MARCH 23-25 | PARIS

STATISTICS

KEY TAKEAWAYS

AGENDA

WHO ATTENDED

HBI 2026

POST CONFERENCE REPORT

The leading international convention for
healthcare CEOs and investors.



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HBI 2026 PARTNERS

STRATEGIC PARTNERS



EVENT PARTNERS



COMMUNITY PARTNERS

ORAL HEALTH



OPHTHALMOLOGY &
OPTOMETRY



ONCOLOGY



PROCUREMENT



MEETING PARTNERS



INDUSTRY PARTNERS





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DIRECTOR'S STATEMENT

This year HBI returned to the CNIT Forest in Paris, our new home having moved the event from London in 2025. The decision to hold the conference in Paris for the second year running was driven by the need to both transform and scale the event, leveraging the systemness of Europe, and to grow our new networking feature, Executive Meeting Suites. These have added an efficient formal meeting opportunity to the already bountiful informal networking opportunities.

HBI 2026 was our biggest ever event, with 994 registered delegates, almost double the size of the 2024 event, from 534 companies from 47 countries. Almost three quarters of the delegation were C-Suite.

I would like to thank everyone who came, who partnered with us and the 204 speakers who took the time to share their insights and case studies.

The theme for 2026, Creating Value in Changing Times, was particularly apposite for how the year had begun with turbulent geopolitical events culminating in a new war in the Middle East which is threatening to throw the world into another energy crisis. Despite this, the message remained clear: healthcare is strong and resilient. The event highlighted that now more than ever the need is to move from break-fix medicine, to proactive and preventative medicine. The embedding of technology, particularly AI, into all parts of the patient pathway to drive efficiency and improve care quality is a huge part of this transition.

This year brought many new features to HBI. We introduced a Life Sciences Stream as we expand our focus to cover the wider spectrum of healthcare, exploring topics such as Pharma Investment, Pharma Services, Genomics and taking Products global. We also launched a new community summit looking at Oncology in more depth. 2026 saw the first edition of the CEO Club, a closed-door CEO-only roundtable discussion and networking lunch. We have big plans to expand this next year.

HBI will return in 2027: same place, same week; March 22-24 at the CNIT Forest. The content model for next year is to go deeper into sectors, covering in greater depth the critical investment, innovation and growth drivers. We will increase the number of Executive Meeting Suites again, as we transition from event to convention; building the marketplace for healthcare CEOs and Investors to accelerate their growth.

I look forward to meeting you (again) in Paris in the Spring.

À bientôt!

– Lee Murray, Events Director, HBI

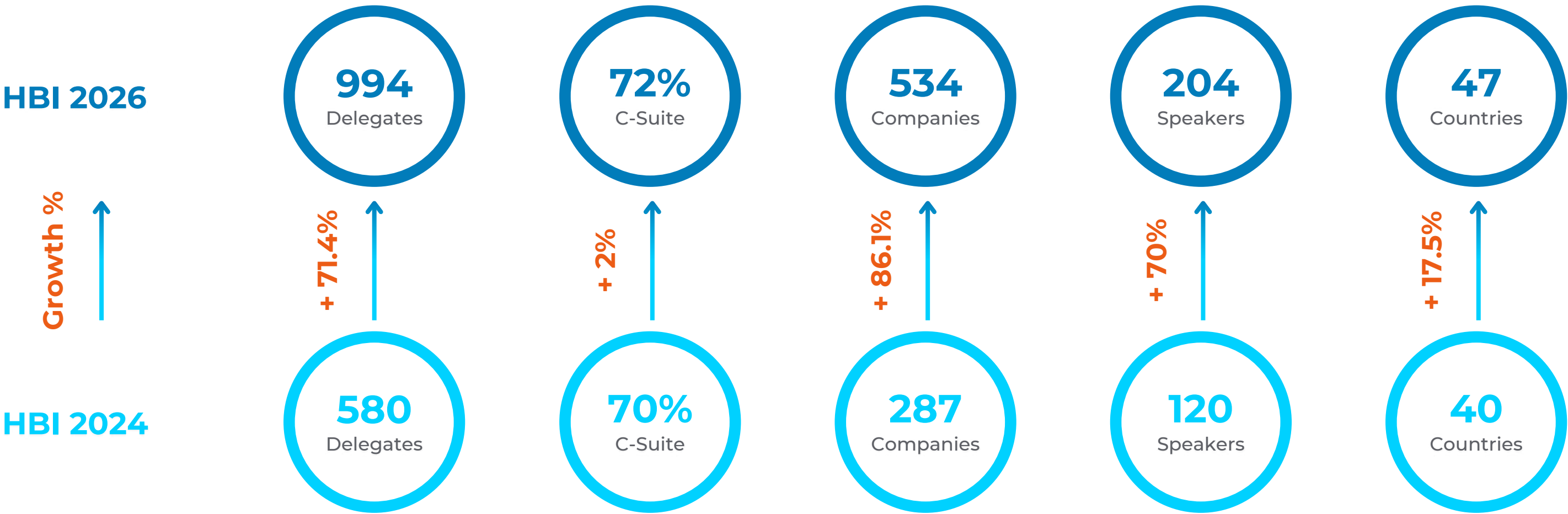




HBI 2026 IN NUMBERS

HBI has been the hub for CEOs and investors since 2012, bringing together the healthcare investment community for formal meetings and informal networking that enable deal-making, partnering, innovation and value creation.

Below shows how HBI has grown between 2024 and 2026:

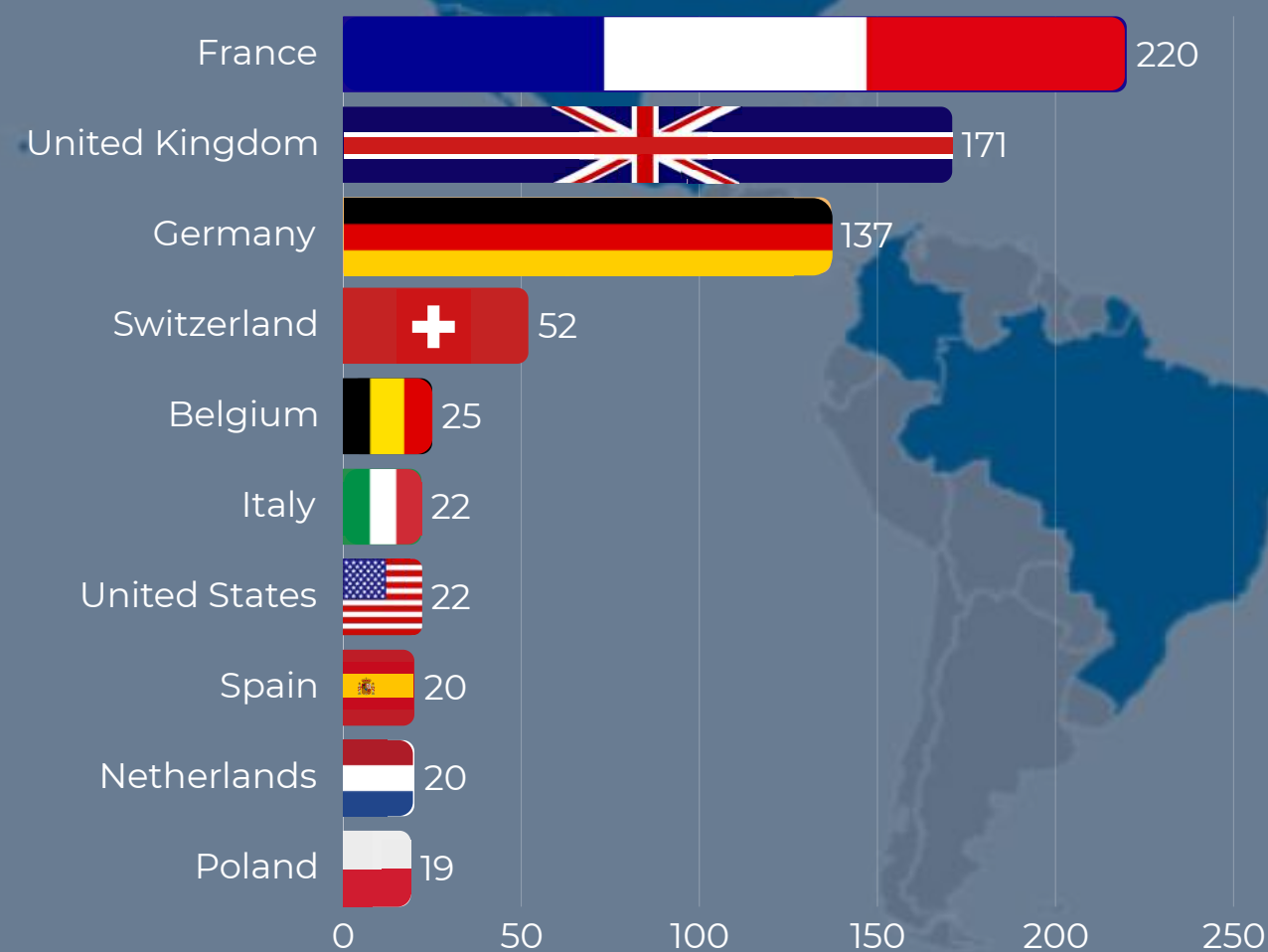




GLOBAL REACH

A truly global gathering, HBI 2026 brought together decision-makers from across Europe, the Middle East, Asia, and the Americas to establish new cross-border collaborations.

HBI 2026 Delegate Footprint: Top 10 Countries by Volume



- Australia
- Brazil
- Colombia
- Denmark
- Germany
- Hong Kong
- Ireland
- Jordan
- Lithuania
- Mexico
- Norway
- Romania
- Slovakia
- Spain
- Turkey
- United Kingdom
- Austria
- Canada
- Cyprus
- Finland
- Greece
- India
- Israel
- Kazakhstan
- Luxembourg
- Monaco
- Poland
- Saudi Arabia
- Slovenia
- Sweden
- Ukraine
- United States
- Belgium
- China
- Czech Republic
- France
- Guadeloupe
- Indonesia
- Italy
- Kenya
- Macedonia
- Netherlands
- Portugal
- Serbia
- South Africa
- Switzerland
- United Arab Emirates



5 KEY TAKEAWAYS

01 VALUE OVER VOLUME

Healthcare is shifting away from traditional models focused on volume and price, towards approaches that prioritise outcomes, long-term value, and sustainability in the face of rising demand, workforce pressures, and growing costs.

02 INVESTMENT REMAINS RESILIENT

Despite short-term uncertainty, structural pressures such as underfunded public systems and capacity constraints are keeping investor interest high, with a focus on platforms that deliver efficiency, standardisation, and consolidation, particularly in fragmented and emerging markets.

03 PREVENTION & AI ARE RESHAPING CARE DELIVERY

The focus is moving from single episodes of care to managing the full patient journey, with early intervention taking priority and AI becoming embedded into everyday workflows to improve efficiency, expand capacity, and support smarter decision-making.

04 SPECIALTY SECTORS ARE DRIVING CONSOLIDATION AND INNOVATION

Areas like oral health and ophthalmology are seeing strong demand and active consolidation, with investors seeking platforms that combine clinic growth with strong leadership, culture, and operational excellence.

05 PROCUREMENT IS EVOLVING BEYOND COST-CUTTING

Value-based procurement is taking centre stage, with decisions now guided by patient outcomes, total cost of care, and broader system impact, while global supply chain dynamics and differences between the US, China, and Europe are becoming increasingly pronounced.



HBI 2026 AGENDA

MONDAY | MARCH 23

09:00 - 12:00 Registration Opens Private Meetings Hosted Industry Partner Events Networking Roundtables		HBI CEO Club 10:30 - 12:00 ACACIA 1&2 In partnership with European Union of Private Hospitals A closed door, invitation only meeting and roundtable discussion for Healthcare CEOs and decision makers from public institutions.	
12:30 – 13:30 Welcome Lunch & Networking		12:00 – 13:30 HBI CEO Club Lunch <i>(Invitation Only)</i>	
Procurement 13:30 – 17:45 ACACIA 5 Healthcare Procurement Summit in partnership with XMED IQ and Health Proc Europe	Communities 13:30 – 15:30 ACACIA 3&4 Oral Health Community Summit in partnership with Straumann Group . Valuations and value creation in times of opportunity	Investing in Emerging Markets 13:30 – 15:30:00 BAOBAB In partnership with International Finance Corporation Investors Forum — Unlocking Opportunities in Emerging Markets: Healthcare & Pharmaceuticals	Offsite Facility & Tech Tour 13:30 – 17:00 In partnership with GE Healthcare
13:30 – 13:50 Welcoming & Opening Addresses Exploring how smarter procurement drives value creation in healthcare			
13:50 – 14:30 Procurement: A CEO Topic			
14:30 – 16:00 Risk-shared procurement: Shifting from price to outcomes with mutual benefits			
16:00 – 16:20 Networking Break			
16:20 – 17:45 The increasing role of social security in reimbursement cuts	15:30 – 16:00 Networking Break		
16:00 – 17:00 BAOBAB Expanding into Saudi Arabia: What actually works a live operator & investor dialogue In partnership with Nexus Gulf			
18:00 – 20:00 Official Opening Reception hosted in partnership with Siemens Healthineers			
20:30 – 00:00 Healthcare Procurement Soirée <i>(Invitation Only)</i> hosted in partnership with Johnson & Johnson , XMED iQ and HealthProc Europe			

TUESDAY | MARCH 24

07:45 – 08:45 BAOBAB Breakfast Briefing hosted by L.E.K. Consulting			
09:00 – 10:00 EPICEA Creating value in changing times		Procurement 08:45 – 09:50 Next-level procurement - The Pharma perspective	
10:00 – 10:30 EPICEA Healthcare in 2026: The M&A landscape		10:45 – 11:45 Procurement as a gateway to innovative partnerships	
10:30 – 11:15 EPICEA What lies ahead? Investor perspectives on the year to come			
11:15 – 11:45 Networking Break			
BAOBAB Healthcare Services 11:45 – 12:45 Next-generation partnerships: How to deliver on healthcare transformation in partnership with GE Healthcare	ACACIA 1&2 Life Sciences 11:45 – 12:45 The New Global Pharma Order: Trump, China & Europe's uncertain future in partnership with ING	ACACIA 3&4 Communities 11:45 – 12:45 Investing in UK & Ireland in partnership with McDermott Will & Schulte	ACACIA 5 Procurement 12:00 – 13:30 Next Level Procurement Force multiplication through pan-European purchasing
12:45 – 14:00 Networking Lunch			
14:00 – 16:00 Oncology Community Summit in partnership with Stingray Healthcare Group Delivering on demand: Matching what patients want with what they reliev Accelerating access and outcomes: Workforce, infrastructure and investment	14:00 – 15:00 Going global: How to scale quickly across international markets In partnership with Citibank	14:00 – 15:00 Healthcare Property Investment Community Operational Demands of Sustainable Healthcare Real Estate	14:00 – 15:00 Investor angle: Procurement as a strategic lever for value creation
	15:00 – 16:00 Demonstrating scalable value creation: Deal readiness in Healthcare IT and Digital Health	15:00 – 16:00 Healthcare Property Investment Community Adaptability Demands of Sustainable Healthcare Real Estate	15:00 – 17:00 Beyond price: Innovative strategic industry use cases for significant savings
16:00 – 16:15 Networking Break			
16:15 – 17:10 Age concerns: Redesigning healthcare to cope with the demands of an ageing population	16:15 – 17:10 Pharma services: Maintaining scalability and differentiation in a consolidating and tech-driven market	16:15 – 18:00 Ophthalmology Community Summit in Partnership with ZEISS Medical Technology Bridging continents: Strategies for standardisation and scale in Europe and Asia	
17:10 – 18:00 Investing in France in partnership with Winston & Strawn	17:10 – 18:00 Unleashing prevention: Models to deploy genomics at scale		
18:00 – 19:30 Champagne Networking Reception hosted in partnership with Rothschild & Co.			
19:45 – 22:00 HBI CEO & Investment Dinner <i>(Invitation Only)</i> hosted in partnership with Winston & Strawn , FTI Consulting and Lazard			

WEDNESDAY | MARCH 25

09:30 – 10:30 BAOBAB

Disrupting traditional models of care

BAOBAB

Healthcare IT

10:30 – 11:15

Agentic AI beyond the scribe:
What's next for healthcare

ACACIA 1&2

Healthcare Services

10:30 – 11:15

Relieving the pressure:
Investment, innovation and value
creation in elderly and social care

ACACIA 3&4

Investment

10:30 – 11:15

Long-term thinking:
Lessons in growth, scale and
internationalisation

11:30 – 11:45

Networking Break

11:45 – 12:45

Building customer growth
engines: The power of data and
KPIs to drive investment decisions

11:45 – 12:45

Investing in DACH

11:45 – 12:45

What is your Fem Tech Stack?
The investment case in
consumer-driven Women's
Health Technology

12:45 – 13:45

Networking Lunch

13:45 – 14:30

AI as a value creation lever -
Case studies from Diagnostics

13:45 – 14:30

The \$9 Trillion opportunity:
The rapid rise of consumer health
and wellness

14:30 – 15:15

Reimagining value: What
healthcare must deliver by 2030

15:15 – 17:00

Closing Drinks Reception



Topics are subject to change, [visit our website](#) for the most up to date agenda.



SECTORS COVERED

HBI exists to serve Healthcare CEOs, Investors and their portfolio companies who are making the investments that transform healthcare access and outcomes. In 2026, we expanded our coverage further with the introduction of a Life Sciences stream, covering MedTech, Medical Devices, Pharma Services and Pharma, and a Healthcare IT and Healthtech stream in addition to Healthcare Services, Communities, and Regional Investment.

The event caters to those operating, investing or partnering with the the following sectors:

	Acute Care		Distribution & Logistics		Imaging & Laboratory Diagnostics		Oncology & Radiotherapy		Pharmacies
	Aesthetics & Cosmetics		Elderly & Social Care		IVD Diagnostics & Tools		Ophthalmology & Optometry		Primary Care
	Animal Health		Fertility		Medical Devices		Pharma		Specialist Clinics
	Dentistry		Healthcare IT & Healthtech		Mental & Behavioural Health		Pharma Services: CRO/ CDMO		Speciality Pharma



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SPEAKERS AT HBI 2026

[View The Full Speaker Line Up Here](#)



Dimitris Moulavasilis
Group CEO
M42



Sophie Boissard
CEO
Clariane



Phillip Shulte-Noelle
Group CEO
Median



Hedley Goldberg
Partner & Global Head of Healthcare
Rothschild & Co.



Martin Tivéus
CEO
Attendo



Rahma Samow
CEO & President
ClearChoice Dental Implant Centres



David Reich
President
Mount Sinai Health System



Anja Bicklemaier
Co-Head of Healthcare
Triton Partners



Phillip Fröschle
CEO
Paracelsus Kliniken



Martin Henrichs
Managing Director
Head of Healthcare EMEA
UBS



Nathalie Boulas-Nilsson
CEO
Humana



Amit Karna
Partner
Keensight Capital



Francois Stoessel
Managing Director
Ontario Teachers' Pension Plan



Tobias Nordblom
Managing Director
Healthcare Flagship
Astorg



WHO ATTENDED?

Healthcare Providers

- Mount Sinai Health System
- Ramsay Santé
- Humanitas
- Penta Hospitals International
- Asklepios Kliniken
- Bergman Clinics
- Vivalto Santé
- M42
- Schoen Klinik Group
- Terveystalo
- Mehilainen Group
- Cerba Healthcare
- Fresenius Helios
- Attendo
- Humana

Life Sciences, Healthcare IT & Suppliers

- Siemens Healthineers
- IQVIA
- Incepto
- GE Healthcare
- Johnson & Johnson MedTech
- Carl Zeiss Meditec
- Boston Scientific
- Straumann Group
- Incepto Medical
- Philips
- Helfie
- Varian
- IBM
- Sanofi
- COMED

Investors

- Macquarie Group
- Astorg
- Praemia
- Triton Partners
- Bain Capital Private Equity
- European Investment Bank
- MoZaic Asset Management
- Fremmen Capital
- Ontario Teachers' Pension Plan
- Keensight Capital
- JP Morgan Asset Management
- Warburg Pincus
- Verlinvest
- IFC
- Deutsche Private Equity

Advisors

- Boston Consulting Group (BCG)
- Bain & Company
- L.E.K. Consulting
- FTI Consulting
- PwC
- Candesic
- Goodwin Law
- Greenberg Traurig
- McDermott Will & Schulte
- Winston & Strawn
- Simmons & Simmons
- Latham & Watkins
- Pillsbury Winthrop Shaw Pittman
- Rothschild & Co
- Jones Lang LaSalle

[Download HBI 2026's Companies List Here](#)



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NETWORKING EVENTS



HBI CEO Club



HBI 2026 Official Opening Reception
hosted in partnership with Siemens Healthineers



Healthcare Procurement Soirée
*hosted in partnership with Johnson & Johnson MedTech,
HealthProc Europe and XMED iQ*



Champagne Networking Reception
hosted in partnership with Rothschild & Co



CEO & Investment Dinner
hosted in partnership with Winston & Strawn, FTI Consulting and Lazard



Closing Drinks Reception



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EXECUTIVE MEETING SUITES

THE NEW WAY TO NETWORK

Executive Meeting Suites allow organisations to have their own private, semi-private or open meeting rooms right at the heart of the event's networking area which provides the opportunity to capitalise on the quantity of the delegation by holding real-quality, effective and efficient meetings.

Meeting Partners benefit from elevated brand recognition and a piece of real estate to hold focussed conversations in a bustling networking environment - where being easily found and being able to hold discussions beyond a surface level can be challenging.



“We come to HBI to both meet with people we know from many different countries and to make new connections. The addition of this space gave us the privacy to catch-up and talk business.”

- Sarper Tanli, Managing Director (MEAT), **Mass General Brigham**

[Download The Executive Meeting Suite Brochure Here](#)



EXECUTIVE MEETING SUITES

A CASE STUDY



“ Mount Sinai has a long history of attending HBI and we were very delighted to be amongst the first attendees and partners with an Executive Meeting Suite, for the first year in Paris last year, and based on that experience, we immediately decided we wanted to return this year.

HBI is a very productive conference for us because we get to speak and network with healthcare leaders of ours from all over Europe, the Middle East and even further regions of the world. Every year that we come we also forge some **new relationships that transform into potential projects for us.**

From our point of view, the investment in HBI, if it produces even one contact that may go beyond the event and morph into a much longer mutually productive and beneficial relationship, then our investment in partnering with HBI by **taking an Executive Meeting Suite is a very worthwhile investment.**

Once again at the end of HBI 2026, we have indeed made such new contacts this year which delight us and give us some great hope that by coming to this event there will be some new and exciting opportunities for our professional and clinical teams in the coming year.

With that in mind, we can easily see collaboration with HBI next year in Paris, if not also for the nascent event that HBI will be hosting in Asia. ”

– Saul Gitlin, Managing Director, **Mount Sinai Health System**



TESTIMONIALS



This is the moment where ideas, new approaches, new partnerships, new business models, all the things that are tough to discuss sometimes publicly, really come together and get developed.

- Reto Merges, Head of Strategic Marketing, **Siemens Healthineers**



HBI is a wonderful event that gathers together senior leaders from across Europe and more widely. The calibre of the conversation and the discussion is always excellent. It's wonderful to be here again.

- Sharon Lamb, Partner, **McDermott Will & Schulte**



It's the quality of the audience. It is great to see so many faces from all over the world and it truly saves me organising 5 different trips to 5 different countries by myself - instead I can just come to Paris and meet hundreds of clients and friends from across the industry.

- Tobias Kösters, Partner, **L.E.K. Consulting**



We spend our time deep in thinking about women's health problems, and yet here we have an opportunity to meet an enormous range of potential partners and potential investors all in one place. It's an amazing opportunity.

- Rhiannon White, CEO, **Clue**



It's brilliant to be a partner to the conference. Nothing beats getting together in person with partners from across the sector to appreciate different perspectives across the healthcare sector. For us, as a long-term strategic partner and from a financing and advisory perspective, that's a critical touchpoint that can't be replaced.

- Stephen Farrelly, Managing Director, Global Lead Pharma & Healthcare, **ING**



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MARCH 15-17
CNIT FOREST, PARIS

The Healthcare Investing Convention

Full day streams covering the breadth of Healthcare Investment:

- Acute Care
- Outpatient Services
- Radiology
- Laboratory Diagnostics
- Pharma Services
- MedTech and Medical Devices
- Healthcare Property
- Healthcare IT and Digital Health
- Wellness and Consumer Health

TAKE YOUR PLACE AT HBI 2027

