Infusion Pump Market - by Product (Volumetric, Syringe, Feeding, Insulin, PCA Pump), Application (Chemotherapy, Gastroenterology, Diabetes, Pain Management), & by End User (Hospital, Home Care, Ambulatory Surgery Centers) - Global Forecast to 2020

Description:
The global infusion pump market was valued at USD 7,281.6 Million in 2014. This market is expected to grow at a CAGR of 5.8% during the forecast period (2015-2020) to reach USD 10,209.4 Million by 2020. The growth in this market is mainly driven by the increasing prevalence of chronic diseases owing to the rising geriatric population; increasing use of infusion products in homecare with favorable reimbursement coverage; and technological improvements in infusion products. However, the presence of stringent regulations for product approval and medication errors associated with infusion pump (and related product recalls in the recent past) may restrain the growth of the market during the forecast period.

By product, the market is segmented into devices and accessories. accessories (comprising dedicated and non-dedicated disposables) accounted for the largest share of 68.0% of the market in 2014. This segment is expected to grow at the highest CAGR of 6.2% during the forecast period. The market is segmented into volumetric, syringe, insulin, enteral, ambulatory, patient-controlled analgesia, and implantable infusion pump.

The increasing demand for insulin and ambulatory infusion pump are driving the demand for these pumps during the forecast period. Certain infusion pump enable mobility of patients during their treatment, owing to which they are increasing being preferred in home care application. Moreover, the implementation of government initiatives to reduce the overall healthcare cost associated with longer hospital stays is supporting the use of infusion systems in home care settings.

North America is the largest regional segment of the global infusion pump market. In 2014, North America accounted for the largest share of 48.7% of the market, followed by Europe, Asia-Pacific, Latin America, and the Middle East and Africa. The large share of this region can be attributed to the high prevalence of chronic diseases; rising penetration of smart pumps; high adoption of ambulatory pumps in the management of chronic diseases; and well-established healthcare infrastructure in the region.

Asia-Pacific countries (particularly China and India) are expected to offer significant growth opportunities for market players in the forecast period owing to the large patient population, increasing incidence of chronic diseases with changing lifestyles, increasing accessibility to advanced products, improving healthcare facilities, and increasing disposable income of the middle class population.

The major players in the infusion pump market are CareFusion Corporation (U.S.), Baxter International, Inc. (U.S.), Hospira, Inc. (U.S.), B. Braun Melsungen AG (Germany), Fresenius SE & CO. KGaA (Germany), Medtronic, Inc. (U.S.), Smiths Medical (U.S.), Terumo Corporation (Japan), Moog, Inc. (U.S.), Roche Holdings Ltd. (Switzerland), and Johnson & Johnson (U.S.). Other players include Pfizer Inc. (U.S.), Novartis (Switzerland), Unomedical A/S (Denmark), Kimberly-Clark Corp (U.S.), Djo Inc. (U.S.), Excelsior Medical Corp. (U.S.), ICU Medical Inc. (U.S.), I-Flow Corporation (U.S.), Insulet Corp. (U.S.), IRadimed Corp (U.S.), LMA International NV (U.S.), Nipro Medical Corp. (U.S.), Summit Medical Group (U.S.), Symbios Medical LLC. (U.S.), Universal Medical Technologies Inc. (U.S.), and Zyno Medical LLC (U.S.).

Scope of the Report

This research report categorizes the global infusion pump market by products, applications, and end user. These markets are broken down into segments and subsegments, with value analysis provided for 2013, 2014, and 2015, as well as forecast for 2020. Each market is comprehensively analyzed by geography (North America, Europe, Asia-Pacific, Latin America, and the Middle East and Africa) to provide in-depth information on the global scenario.

Global Infusion Pump Market, by Product

Infusion Pump (Devices) Market
- Volumetric
- Syringe
- Ambulatory
  -- Disposable
  -- Chemotherapy Pumps
- Enteral
- Insulin
- Implantable
- Patient-controlled Analgesia

Infusion Pump Accessories Market

- Dedicated Disposables
  -- Volumetric Pump Dedicated Disposables
  -- Syringe Dedicated Disposables
  -- Ambulatory Dedicated Disposables
  -- Enteral Dedicated Disposables
  -- Insulin Dedicated Disposables
  -- Implantable Dedicated Disposables
  -- Patient-controlled Analgesia Pump Dedicated Disposables
- Non-dedicated Disposables
  -- Infusion Catheters
  -- Valves
  -- IV sets
  -- Cannulas
  -- Tubing
  -- Needles
  -- Others (Reservoir Bags & Containers, Filters, and Connectors & Fittings)

Global Infusion Pump Market, by Application

- Chemotherapy
- Gastroenterology
- Analgesia/Pain Management
- Diabetes
- Pediatrics/Neonatology
- Hematology
- Others (Infectious Diseases and Autoimmune Diseases)

Global Infusion Pump Market, by End User

- Hospitals
- Home Care
- Ambulatory Surgical Centers
- Others (Clinics, Military, Government Bodies, and Research Institutes)

Global Infusion Pump Market, by Region:

- North America
  -- U.S.
  -- Canada
- Europe
  -- Germany
  -- U.K.
  -- France
  -- Italy
  -- Spain
  -- Rest of Europe (RoE)
- Asia-Pacific (APAC)
  -- Japan
  -- China
  -- India
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