Intraosseous Infusion Devices Market: Global Industry Analysis & Opportunity Assessment, 2016-2026

Description:

Intraosseous infusion devices are emergency medical products intended for managing life threatening conditions. These products are generally used when there is no access to veins for desired infusion. Intraosseous vascular access is a rapid and alternative method for immediate medical intervention during emergency situations. The global intraosseous infusion devices market is projected to register 2X market growth between 2016 and 2026, witnessing a significant CAGR of 7.2% over the forecast period. The global intraosseous infusion devices market is estimated to be valued at US$ 5,468.5 Mn by the end of 2026.

Growing need for immediate vascular access and rising number of emergency cases expected to boost global market growth

Intraosseous infusion is recommended during peripheral venous access failure for cardiopulmonary resuscitation, which in turn is expected to favour the growth of the global intraosseous infusion devices market over the forecast period. Growth of the global intraosseous infusion devices market is primarily driven by rising concerns of the medical device industry for military medics and air medical emergency services. A rising number of traumatic surgeries in hospital settings and increasing prevalence of cardiovascular disorders is expected to further bolster market growth.

However, a high possibility of compartment syndrome due to gushing of fluids and drugs into soft tissues; limitations in the case of individuals with severe osteoporosis and hypovolemic conditions; and impediment of IO infusion devices after arrival of vein viewer are factors likely to restrict market growth over the forecast period.

Market segmentation

The global intraosseous infusion devices market is segmented on the basis of Product Type (B.I.G (Bone Injection Gun), FAST1, EZ-IO, FAST Responder, Intraosseous Needles, Others); Technology (Manual, Automatic); End User (Emergency Medical Services, Hospitals, Ambulatory Surgical Centres, Cardiac Care Centres); Route of Administration (Sternum, Distal & Proximal Tibia, Distal Femur, Calcaneus, Head of Humerus); and Region (North America, Latin America, Western Europe, Eastern Europe, Asia Pacific Excluding Japan (APEJ), Japan, and the Middle East & Africa).

FAST Responder product type segment is expected to experience significant gain in terms of volume

The FAST Responder segment was valued at US$ 474.5 Mn in 2015 and this is expected to increase to US$ 506.3 Mn by the end of 2016. The EZ-IO segment is expected to be the most attractive segment in terms of incremental opportunity over the forecast period.

Automatic technology segment is likely to register a healthy CAGR in terms of value

The Automatic segment is estimated to account for 52.7% market share by the end of 2026. The Automatic segment is expected to grow 2.1X from 2016 to 2026 with a dominating CAGR. The Manual segment is expected to register a CAGR of 6.4% over the forecast period and create incremental opportunity of US$ 1,111.2 Mn between 2016 and 2026.

The Head of Humerus route of administration segment is projected to witness a significant CAGR over the forecast period

The Head of Humerus segment accounted for 22.0% market share in 2016 and is expected to reach 23.2% market share by 2026 end. The Sternum segment is expected to register a CAGR of 7.4% with incremental opportunity of US$ 810.0 Mn over the forecast period.

Hospitals end user segment is expected to be the most attractive segment in terms of incremental opportunity and CAGR
The Hospitals segment is expected to grow 2.2X from 2016 to 2026 and register a CAGR of 7.7% over the forecast period. The Cardiac Care segment is expected to experience high growth in terms of revenue during the forecast period.

North America is expected to remain the dominant regional market.

The North America market is estimated to account for a market share of 25.9% by the end of 2016 and this is likely to increase to 27.2% by 2026, witnessing a CAGR of 7.8% in terms of revenue over the forecast period. The APEJ market was valued at US$ 566.0 Mn in 2015 and is likely to increase to US$ 600.4 Mn by the end of 2016. Western Europe is expected to be the fastest growing market in terms of revenue growth in the global intraosseous infusion devices market, registering a CAGR of 7.6% over the forecast period.

Intraosseous infusion devices market

Market players are focussing on new product launches and market growth through capacity expansion.

Pyng Medical Corp., Cook Medical Incorporated, PerSys Medical, Aero Healthcare, Teleflex, Inc., and Becton Dickinson and Co. are some of the companies operating in the global intraosseous infusion devices market. These companies are increasing their distribution network by expanding locally and globally through collaborations and partnerships; and are focussing on increasing market presence by setting up new production facilities in high growth regions such as India and China. There is also a heightened focus on maintaining high standards in product quality and diversifying the product portfolio through structured innovation and strategic investments in R&D initiatives.

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