Catheters Market Size, Market Share, Application Analysis, Regional Outlook, Growth Trends, Competitive Scenario And Forecasts, 2012 To 2020

Description:

Industry Insights

The overall catheters market is majorly driven by the increasing demand for minimally invasive surgical interventions especially with reference to cardiovascular diseases. Shorter procedure duration and faster patient recovery post surgery are the two most important factors contributing towards the growing demand of these surgical procedures. Rising global geriatric population base (more than 65 years of age) and growing prevalence of lifestyle related diseases such as obesity and diabetes also make remarkable contribution towards the development of the global catheters market. Moreover, growing demand for minimally invasive surgical procedures in emerging economies such as China and India and the launch of technologically advanced catheters promising higher efficacies will boost the market growth. The worldwide catheter market was valued at over USD 24,380.0 million in 2013 and is expected to inflate at a CAGR of over 9.0% for the given forecast period. Technology innovations aimed at curbing hospital acquired infections associated with catheterization and enhancing healthcare practitioner's efficiency in terms of flexibility and maneuverability are also expected to help this market grow at a healthy rate during the forecast period. Technologically advanced catheters comprising antimicrobial coated catheter, touch free and force sensing catheter are revolutionizing the market growth during the forecast period.

Product Insights

Cardiovascular catheters emerged as market leader accounting for the largest revenue share of over 39.3% in 2013. They found wide application in cardiac interventional surgical procedures such as angioplasty (stenting) and angiography. Rising incidence rates of cardiovascular diseases thereby resulting into increased number of interventional procedures are the major growth driving factor for this market. Additionally, introduction of novel products such as bio absorbable stents, are gaining popularity in the field of cardiovascular interventions procedures accelerate the demand of cardiovascular catheters. Second largest revenue share is held by urology catheter and was valued at USD 8,351.0 million in 2013 owing to factors such as increasing prevalence of urological ailments such as incontinence and the introduction of technologically advanced products such as the usage of antimicrobial coatings on catheters. Specialty catheters market is expected to gain revenue share over the next six years, owing to the increasing demand for flexible and trackable catheter. Moreover, growing demand for ablation procedures clubbed with the fact that the global geriatric base of population (age group 65 years and above) is expected to increase from over 7% in 2000 to 16% in 2050 are expected to serve catheter market as a driver by potentiating the incidence rates of urological disorders.

Regional Insights

North America emerged as market leader in terms of revenue share at over 38.0% in 2013 due to increasing prevalence of catheterization and interventional procedures (minimally invasive) in this region. Substitution of conventional products by the technologically advanced ones is a key trend observed in this regional market. Additionally, presence of improvised healthcare infrastructure, better patient awareness levels and increasing healthcare expenditures and are also impact rendering factors expected to drive regional market growth over the next six years. On the other hand in European market the presence of relatively less stringent device approval CE regulations have encouraged manufacturers to choose it as a lucrative option for future R&D investments and product commercialization. Presence of large untapped opportunities in the emerging Eastern European countries is also expected to boost regional growth during the forecast period. Moreover, Asia Pacific is expected to grow lucratively at a CAGR of over 14.0% in 2014 - 2020. Increasing penetration rates of neurovascular and urology catheters in the emerging economies such as India and China key factor driving this lucrative growth. Improving economic conditions coupled with rising healthcare expenditure levels and presence of high unmet medical needs is expected to boost growth to catheters market.

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