

Medical Device Coating Market Forecast to 2028 - COVID-19 Impact and Global Analysis By Material Type (Polymer, Metal, and Others), Devices (Medical Equipment and Tools, Medical Devices, Medical Implant, and Others), Coating (Hydrophilic Coating, Anti-Microbial Coating, Drug-Eluting Coating, Anti-Thrombogenic Coating, and Others), and Application (Infection Diseases, General Surgery, Orthopedic, Neurology, and Others)

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Report description:

The global medical device coating market is expected to grow from US\$ 7,644.09 million in 2021 to US\$ 12,818.01 million by 2028; it is estimated to grow at a CAGR of 7.7% from 2022 to 2028. The high prevalence of healthcare associated infections (HAIs) drives the market growth. Further, increasing R&D activities and innovation in medical device coating materials would act as a future trend for the overall market growth during the forecast period.

Urinary tract infections, central line-associated bloodstream infections, and ventilator-associated pneumonia are among the healthcare-associated infections that may occur at surgery sites. According to a report titled "2020 National and State Healthcare-Associated Infections Progress Report," published by the Centers for Disease Control and Prevention (CDC) in 2021, about 24%, 35%, and 15% increase were recorded in central line-associated bloodstream infections, ventilator-associated events, and methicillin-resistant *Staphylococcus aureus* (MRSA) bacteremia, respectively, in the US between 2019 and 2020. As per January 2022 report published by National Healthcare Safety Network (NHSN), urinary tract infections (UTIs) are the fifth most common type of healthcare-associated infection, accounting for more than 9.5% of conditions reported by acute care hospitals.

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Catheter-associated urinary tract infection (CAUTI) is caused by urinary catheters that are placed to drain urine from the bladder. CAUTI is one of the most common infections among UTIs acquired in the hospital. As per the Centers for Disease Control and Prevention (CDC) report published in 2020, approx.75% of infections are associated with a urinary catheter during their hospital stays. Prolonged discomfort, longer hospital stays, increased treatment expenses, and even mortalities are among the complications associated with CAUTI.

As per CDC, nearly 13,000 deaths annually are associated with UTIs. Additionally, according to Global Burden of Disease (GBD 2019), more than 404.6 million individuals across the world had UTIs in 2019 with a significant increase from 252.2 million individuals in 1990. Thus, increasing incidences of CAUTI stokes the demand for coated medical devices.

Medical Device Coating Market: Segmental Overview

Based on material type, the medical device coating market is segmented into polymer, metal, and others. The polymer segment accounted for the largest market share in 2021 and is expected to register the highest CAGR from 2022 to 2028. Based on devices, the market is segmented into medical equipment and tools, medical implants, medical devices, and others. The medical equipment and tools segment led the market in 2021 and is expected to retain its dominance during the forecast period. Based on coatings, the market is segmented into hydrophilic coatings, antimicrobial coatings, drug-eluting coatings, anti-thrombogenic coatings, and others. The hydrophilic coating segment led the market in 2021 and is expected to retain its dominance during the forecast period. Based on application, the market is segmented into infectious diseases, neurology, orthopedics, general surgery, and others.

Medical Device Coating Market: Geographical Overview

North America holds the largest share of the medical device coating market, whereas Asia Pacific is the fastest-growing region. The US remains the largest medical device market globally, owing to the presence of more than 6,500 medical device companies comprising small and medium-sized enterprises (SMEs). In the US, California, Florida, New York, Pennsylvania, Michigan, Massachusetts, Illinois, Minnesota, and Georgia have the highest number of medical device companies. Additionally, medical device companies in the country are highly recognized worldwide due to their innovative and high-technology products.

The Center on Budget and Policy Priorities 2022 report states that the US medical industry has estimated total sales of US\$ 130 billion to US\$ 170 billion annually, with a few top competitive players like Johnson & Johnson accounting for considerable revenue share intended for medical devices and diagnostics. Further, 19 major US firms account for half the total sales of medical supplies and equipment, and the top 58 firms account for about three-quarters of sales. The US medical device coating market is anticipated to grow during the forecast period owing to the rising adoption of medical devices and substantial spending on these devices.

Asia Pacific is likely to register the highest CAGR in the medical device coating market during the forecast period. The Asia Pacific medical device coating market is segmented into China, Japan, India, South Korea, Australia, and the Rest of Asia Pacific. An upsurge in industrialization activities in emerging Asia Pacific countries and favorable policies implemented by the government of India, such as Foreign Direct Investment (FDI) and Make in India, are expected to create growth opportunities for the market players across the region in the coming years. Moreover, the increasing geriatric population, rising burden of chronic disorders, surging healthcare expenditure, and the growing surgical procedures are expected to boost the growth of the market in the region.

Future Trend of Medical Device Coating Market

Medical device coatings range from lubrications to antimicrobials to water-repellent polymers and can be customized according to

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the device's type. Intense R&D activities bring to the surface some innovative coated surgical devices. In May 2022, the University of California Los Angeles (UCLA) created a zwitterion polymer coating for in-dwelling medical devices to prevent microbial adherence and troublesome biofilms formation. The coating binds water molecules creating a thin hydration barrier that deters microbes from binding and proliferation. A team of University of British Columbia (UBC) medicine research and the Vancouver Coastal Health Research Institute developed a cost-effective silver-based coating for catheters and stents after screening dozens of chemical components and overcoming the complications that silver posed for decades. These coatings are expected to not harm the tissues and eliminate the implant-associated infections.

The parylene, medical-grade polytetrafluoroethylene (PTFE), and albumin coatings are advantageous over traditional titanium nitride and physical vapor deposition (PVD) coatings. For instance, parylene offers thermal stability up to 300°C, protects against dust and humidity; it is optically transparent, biocompatible, and approved by the US FDA. Such research and development activities in medical device coatings are likely to propel the future market growth.

Food and Drug Administration (FDA), Public Library of Science (PLOS), and National Institute of Health (NIH) are a few secondary sources referred to while preparing the report on the global medical device coating market.

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