

## **Germany Neonatal and Prenatal Devices Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 80 pages | Mordor Intelligence

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### **Report description:**

The German neonatal and prenatal devices market is expected to register a CAGR of nearly 7.1% during the forecast period.

The COVID-19 pandemic has significantly impacted the neonatal and prenatal devices market. For instance, according to the study published in the Journal of Reproductive and Infant Psychology in December 2021, the overall maternal mental health, newborn perceptions, and early caregiving during the initial stages of the COVID-19 pandemic did not alter significantly from pre-pandemic perspectives. However, with the onset of the COVID-19 cases, lockdowns and fear of contamination were the leading causes of delayed health-seeking, resulting in problematic pregnancies. COVID-19 infection during pregnancy raises the risk of pregnancy complications such as preterm birth, early rupture of the membranes, and, in rare cases, maternal mortality. As a result, the market was significantly impacted during the COVID-19 pandemic. However, since the restrictions were lifted, the industry has been recovering well. Over the last two years, the market recovery has been led by the rise and the risk of pregnancy complications and new product launches by market players.

The market's growth factors include an increasing number of preterm and low-weight births, growing technological advancement in infant and maternal care products, and rising congenital and pregnancy complications due to a sedentary lifestyle. Preterm babies often require special care in the neonatal intensive care unit (NICU) which created a demand for neonatal devices. According to the Statistisches Bundesamt (Destatis) 2022, there were 3,420 stillborn children in Germany in 2021 which equates to 4.3 stillbirths for every 1,000 births. Also, according to the federal statistical office (destatis), the rate had been trending slightly upward since 2010, after reaching an all-time low of 3.5 stillbirths per 1,000 births in 2007. In both 2020 and 2019, 4.1 children out of 1,000 births were stillborn. The growing incidence of stillbirths in the country is expected to increase the demand for neonatal and prenatal devices, thereby boosting market growth.

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Besides, various strategies adopted by the market players are also contributing to the market growth. For instance, in November 2020, Natus Medical acquired the neonatal healthcare equipment company Baby. Additionally, in May 2020, Drägerwerk AG & Co. KGaA launched Evita V600 and V800, and Babylog VN600 and VN800 to facilitate the intensive care ventilation of adults to premature babies, with an operating concept designed to enable flexible orientation and to provide clearer user guidance. ?

While the market is expected to experience a boost, the rising cost of neonatal care is one of the major factors hindering the Germany neonatal and prenatal devices market growth.

#### Germany Neonatal & Prenatal Devices Market Trends

##### Incubators Segment is Anticipated to have a Highest Share in the Studied Market Over the Forecast Period

An incubator is an apparatus used to maintain environmental conditions suitable for a neonate (newborn baby). It provides a safe, temperature-controlled environment for a baby that needs NICU care. Neonatal incubators are often necessary for infants. Some low birth-weight infants need respiratory support ranging from extra oxygen (by the head hood or nasal cannula) to continuous positive airway pressure (CPAP) or mechanical ventilation. The temperature regulation of infants is among the major factors to be controlled in neonatal incubator cases. The companies have varied devices on several parameters, among which temperature regulation is very important, as severe temperature differences lead to neonate heat loss, hypothermia, and apnea, which are closely related to airflow and air velocity.

The rise in preterm and low-weight birth drives the segment. For instance, according to the study published by BMC Pregnancy and Childbirth in February 2021, the median gestational age for preterm birth is 32.3 weeks, and 6.1% of babies were born weighing less than 2500 g in 2020. It also stated that birth weights less than the 10th percentile for gestational age were found in 8.5% of the total cohort in the German population in 2020.

Every year numerous studies related to neonates are carried out in the country by the German Neonatal Network, funded by the German Ministry of Education and Research to understand the improvements in prenatal care. One such study was undertaken in the year 2020 to understand the survival rates of preterm infants obtaining active perinatal care, in 43 Level III NICUs across Germany. Such initiatives highly facilitate the adoption of neonatal and prenatal care equipment within hospitals. ?

##### Ultrasound and Ultrasonography Devices are Expected to Hold a Significant Market Share Over the Forecast Period

A fetal ultrasound (sonogram) is an imaging technique that uses sound waves to produce images of a fetus in the uterus. Fetal ultrasound images can assist a healthcare provider in evaluating the baby's growth and development and monitoring the pregnancy. Fetal ultrasonography is sometimes used to evaluate potential abnormalities or to confirm a diagnosis.

The availability of technologically advanced products in the market also contributes to market growth. For instance, 3D ultrasound allows doctors to evaluate internal and exterior fetal anatomy using static 3D images. Also, 4D ultrasound has recently been introduced in medical practice and complements 2D and 3D examination by obtaining images in real time. During a 4D ultrasound, the practitioner can broadcast footage of anatomical images. This allows healthcare personnel to observe the function of the fetal heart wall and valves and blood flow through various veins.

Also, a study published in the Journal of BMC Pregnancy and Childbirth in April 2022 reported that ultrasound findings help in the prenatal diagnosis of Wolf-Hirschhorn syndrome in Germany. In the study, all women underwent a complete fetal abnormality examination, which included fetal echocardiography using high-resolution ultrasound equipment to detect Wolf-Hirschhorn syndrome in the fetus. The advantages of ultrasonography in detecting fetus abnormality and various diseases diagnosis are expected to propel the segment's growth over the forecast period.

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## Germany Neonatal & Prenatal Devices Market Competitor Analysis

The German neonatal and prenatal devices market studied is consolidated owing to the presence of various small and large market players. Companies like Dragerwerk AG & Co. KGaA, GE Healthcare, Siemens Healthineers AG., and Hoffmann-La Roche Ltd, among others, hold substantial shares in the fetal and neonatal care equipment market. Some strategies implemented include agreements, collaborative models, business expansion, and product developments.

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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