

Intra-Abdominal Pressure Measurement Devices Market - Growth, Trends, and Forecasts (2023 - 2028)

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Report description:

The intra-abdominal pressure measurement devices market is anticipated to register a CAGR of about 8.6% during the forecast period.

Key Highlights

COVID-19 significantly impacted the abdominal pressure measurement devices market during the initial phases since the import, export, and approvals of medical devices were restricted or delayed due to the pandemic. However, since the restrictions were lifted, the sector bounced back well. Over the last two years, increased intra-abdominal pressure (IAP) measurement devices, new product launches, and a high abdominal compartment syndrome prevalence have contributed to the market recovery.

Certain factors driving the market's growth include the increasing prevalence of intra-abdominal hypertension (IAH), abdominal compartment syndrome (ACS), and technological advancements. According to the Health Resources and Services Administration (HRSA) 2021 report, the number of people who had undergone kidney transplantation in 2021 in the United States was 24,670. In addition, there were 90,483 persons on the kidney transplant waiting list.

According to an article published in February 2022 in PubMed, elevated IAP was highly prevalent after kidney transplantation and was independently associated with delayed graft function, postoperative complications, and absence of renal function recovery. IAP measurement needs bladder catheterization, which is a simple, standardized method.

Since patients who have undergone kidney transplantation need monitoring of IAP to detect further complications and considering the number of kidney transplantations, the demand for IAP measurement devices is likely to rise, thereby boosting the market growth.

According to a January 2022 publication in Critical Care Medicine, ACS was detected more frequently in trauma centers (TC) than in non-trauma centers (NTC). As per the same source, ACS is more likely secondary to fluid overload in non-NTC, while it is anticipated to be secondary to shock in TC. Furthermore, increased research activities relating to IAH and ACS will likely promote

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the market during the forecast period since these will likely increase demand for IAP devices.

According to an article published in September 2022 in the Multidisciplinary Digital Publishing Institute (MDPI) Journal, IAH is associated with a poor prognosis and an increased need for surgical interventions with associated morbidity and mortality. In addition, trauma patients with ACS have more complications, mechanical ventilation, organ failure, and extended stay. IAH and ACS develop in the presence of tense abdominal distension. The rise in IAP causes tissue hypoperfusion which can lead to multiple organ dysfunction syndromes and impair the function of nearly every organ system.

IAP monitoring has proven to significantly improve patient survival among patients in the Intensive Care Unit with IAH and/or ACS. Hence considering the importance of IAP monitoring, the intra-abdominal pressure measurement devices market will likely witness growth over the forecast period. Given the rising prevalence of IAP hypertension and the importance of IAP monitoring, the intra-abdominal pressure measurement devices market will likely witness growth over the forecast period. However, less utilization of IPMDs in general surgery and false negative results will likely restrain the market growth over the forecast period.

Intra-Abdominal Pressure Measurement Devices Market Trends

Hospital Segment is Anticipated to Hold a Significant Share in the Global Intra-Abdominal Pressure Measurement Devices Market Over the Forecast Period

Factors such as technological advancements and prolonged hospital stays are anticipated to promote the market over the forecast period. For instance, according to an article published in April 2022 in PubMed, IAH is a significant and independent predictor of short- and long-term mortality, as well as severe organ failure and a prolonged hospital stay. Furthermore, as per an article published in May 2021 in Sage Journal, IAH is associated with acute renal outcomes in ICU and non-ICU patients. Hence, hospital systems typically use IAH measurement devices on patients undergoing surgery or therapy for chronic conditions to provide better care for their patients. As a result, this can boost the IAP measurement device segment growth over the forecast period.

As the number of hospitals increases, the demand for IAH devices increases, thereby driving the overall market growth over the forecast period. Hence, considering the risk of developing IAP in ICU-admitted patients and the increase in technological advancements in IAP measurement devices, the use of IAP measurement devices in hospitals is likely to increase, thereby boosting the market segment growth over the forecast period.

For instance, according to the AHA hospital statistics for 2022, the United States has 6,093 hospitals, and the total number of admissions to all US hospitals is projected to be 33,356,853 in 2022. Hence, as the number of hospital admissions increases, ICU units are likely to be in demand for IAP measurement devices, which is anticipated to boost market growth during the forecast period.

Factors such as technological advancements and prolonged hospital stays are anticipated to promote the market during the forecast period. For instance, according to an article published in April 2022 in PubMed, IAH is a significant and independent predictor of short- and long-term mortality, as well as can cause organ failure and lead to a prolonged hospital stay. Furthermore, as per an article published in May 2021 in Sage Journal, IAH is associated with acute renal outcomes in ICU and non-ICU patients. Hence, hospital systems typically use IAH measurement devices on patients undergoing surgery or therapy for chronic conditions to provide better care for their patients. As a result, this can boost the IAP measurement device segment growth during the forecast period.

As the number of hospitals increases, the demand for IAH measurement devices increases, thereby driving the overall market growth during the forecast period. Furthermore, according to the American Hospital Association (AHA) hospital statistics for 2022, the United States has 6,093 hospitals, and the total number of admissions to all US hospitals is projected to be 33,356,853 in 2022. Therefore, as hospital admissions rise, ICU units are likely to need IAP measurement devices, which is expected to fuel market growth for IAP measurement devices during the the forecast period.

Furthermore, according to the 2022 report from the American Cancer Society (ACS), kidney cancer is among the ten most

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common cancers in both men and women. The same source estimated that in 2022 there would likely be 28,710 cases of kidney cancer in women and 50,290 cases in men. Overall, the lifetime risk for developing kidney cancer in men is about 1 in 46 (2.02%). The lifetime risk for women is about 1 in 80 (1.03%). Therefore, IAH is more likely to develop in people who have high-risk kidney problems, which is expected to result in hospitalization, hence, accelerating the IAP measurement devices market growth during the forecast period

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North America is Expected to Witness a Growth in the Intra-Abdominal Pressure Measurement Devices Market Over the Forecast Period

North America is expected to witness growth in the intra-abdominal pressure measurement devices market owing to the rapid rise in the number of hospitals and ambulatory surgical centers, adoption of advanced medical technologies, surge in cases of chronic diseases, and prevalence of intra-abdominal hypertension.

Intra-abdominal hypertension (IAH) and abdominal compartment syndrome (ACS) are two complications that intensive care unit (ICU) patients potentially experience. All bodily systems, particularly the cardiovascular, respiratory, renal, and neurological systems, are impacted by ACS and IAH. Hence, the rise in chronic diseases in the North American region can create demand for the IAP devices market. For instance, according to the International Agency for Research on Cancer (IARC) estimations, the number of people affected with Kidney cancer is anticipated to be 10,030 by 2040 in Canada.

Digital IAP monitoring devices are now commonly used in the ICU to continuously monitor patients who do not require doctors to monitor them. Hence, digitalizing IAP monitoring devices will propel the IAP measurement devices market forward. For instance, a case study published in the OTA journal in June 2022 showed how the MY01 (NXTSENS, Montreal, Canada) is a minimally invasive device that can accurately and continuously measure changes in intra-compartmental pressure.

The management of ACS in level 1 trauma facilities and rural places where continuous clinical monitoring is not possible is significantly impacted by preliminary clinical data. Finally, continuous ICP monitoring has the potential to be a valuable tool for both traumatologists and trauma patients. Similarly, the availability and use of innovative instruments such as digital pressure monitors are expected to increase demand for compartment syndrome measurement devices in the near future.

As a result of the increase in the number of hospitals and ambulatory surgical centers, the adoption of advanced medical technologies, high prevalence of intra-abdominal hypertension, North America is expected to witness growth in the IAP measurement devices market during the forecast period.

Intra-Abdominal Pressure Measurement Devices Market Competitor Analysis

The IAP measurement devices market is competitive and consists of a few major players. Companies adopt strategic plans such as mergers, acquisitions, and collaboration in order to increase their presence.

Companies, like Becton, Dickinson and Company, Medline Industries, ConvaTec Inc., Potrero Medical, Spiegelberg GmbH, and Stryker, among others, hold a substantial market share in the market.

Additional Benefits:

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

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