

Global Elastomeric Infusion Pumps - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global Elastomeric Infusion Pumps Market size is estimated at USD 769.03 million in 2024, and is expected to reach USD 979.16 million by 2029, growing at a CAGR of 4.95% during the forecast period (2024-2029).

The COVID-19 pandemic had an impact on the healthcare industry. The outbreak of COVID-19 led to disruption, challenges, limitations, and changes in each sector of every industry. The COVID-19 pandemic is expected to have a significant impact on the market. Due to the rising number of COVID-19 cases and related hospitalization, the demand for elastomeric infusion pumps increases to deliver drugs safely in intensive care units. For instance, according to an article published in September 2020, titled 'Elastomeric pumps for symptom control medication in patients dying with COVID-19', it has been observed that elastomeric infusion pumps are more effective for delivering continuous subcutaneous infusions (CSCIs) in palliative care as compared to syringe drivers. Thus, considering elastomeric pumps as a more viable alternative for administering medications in COVID-19 patients as well as in avoiding contamination the demand for its adoption in intensive care units has increased which has impacted the market during a pandemic.

Certain factors that are propelling the market growth are the advancements in the device technologies and the advantages of the elastomeric pumps and the growing burden of chronic diseases.

The rising prevalence of chronic diseases is the key factor driving market growth. For instance, according to the International Diabetes Federation Diabetes Atlas Tenth edition December 2021, around 537 million adults all over the world were found to have diabetes in 2021 and this number is projected to grow to 643 million by 2030 and 783 million by 2045. Also, according to World Health Organization (WHO) data published in April 2021, chronic diseases are expected to kill 41 million people each year, equivalent to 71% of all deaths globally. In low- and middle-income countries chronic disease death accounted for 77%. Similarly,

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according to an article published in May 2022, titled 'Osteomyelitis', it has been found that 50,000 cases of osteomyelitis are reported each year in the United States. In addition, as per the same source, the incidence of osteomyelitis is higher in men as compared to women and increases with age which is due to the increasing prevalence of comorbid factors such as diabetes mellitus and peripheral vascular disease. Thus, the rising burden of chronic disease among the population is expected to increase the demand for delivering medications safely via intravenous route, which in turn is expected to increase the demand for elastomeric infusion pumps, thereby fueling the market growth.

Similarly, as per an article titled '5 Most Common Cardiac Surgeries in India' published in October 2021, doctors perform over 500,000 open heart surgeries worldwide every year, and in India, alone doctors perform over 60,000 open heart surgeries yearly. With the incidence of cardiac disorders rising, the need to know about their possible treatments is increasing too. Thus, the increasing number of cardiac surgeries rise the demand for infusion pumps for continuous delivery of medications, which is expected to drive the demand for elastomeric infusion pumps, thereby propelling the market growth.

In addition, the elastomeric infusion pump system offers several advantages over electronic pumps including portability, feasible demonstration, low weight, size, ease of use, and less interference with sleep.

Moreover, the growing advancements in devices and technologies are also contributing to market growth. For instance, In November 2020, Ambu Inc. entered an agreement with Intalere for pain care management solutions. In this agreement, Intalere members would receive the Ambu ACTion™ Block Pain Pump. The pump enables anesthesiologists to customize the infusion approach to best meet each patient's specific pain demands throughout the course of treatment and delivers a continuous, stable supply of local anesthetic to the nerve block catheter.

However, the safety issues and disadvantages associated with the pumps and the high cost in long-term use, and strict regulations are some of the factors that are hindering the market growth.

Elastomeric Infusion Pumps Market Trends

Chemotherapy Segment Expects to Register a High CAGR During the Forecast Period

The chemotherapy segment is expected to witness a significant growth in the elastomeric infusion pumps market over the forecast period owing to the factors such as the rising incidences and prevalence of various types of cancer, the surge in preference for long-term home healthcare, and the increase in adoption of elastomer infusion pumps in ambulatory chemotherapy and analgesic infusion centers.

For instance, according to the January 2022 update by Breastcancer.org, about 1 in 8 United States women (about 13%) will develop invasive breast cancer throughout their lifetime. In addition, in 2022, an estimated 287,850 new cases of invasive breast cancer are expected to be diagnosed in women in the United States as compared to an estimated 276,480 new breast cancer cases occurred in 2020. As per the same source, 300 114 new cancer cases in males were reported in Brazil in 2020, out of which 97 278 cases were of prostate cancer. Thus, the rising burden of cancers among the population is expected to increase the demand for delivering chemotherapy, immunotherapy, and targeted therapy to treat cancer, which is anticipated to increase the demand for elastomeric pumps, thereby propelling market growth.

In addition, as per an article published by the BioMedical Central Journal of Pharmaceutical Health Care and services, in January 2021, titled 'Impact of air temperature and drug concentration on liquid emission from elastomeric pumps', the use of elastomeric pumps (EPs), for delivering antibiotics, analgesics, and anticancer drugs, enables quantitative and continuous medication administration without the need for electronic control. Also, the chemotherapy regimens FOLFOX, FOLFIRI, and FOLFIRINOX for colorectal and pancreatic cancers, respectively, call for administering 5-fluorouracil (5-FU) continuously for 46 hours. In addition,

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as per the same source, the recent developments in cancer chemotherapy have been observed to lessen the patient burden and increase treatment satisfaction when patients switch from inpatient to outpatient care even elastomeric infusion pumps are found useful for patients treated at home as they enable continuous administration of drugs. This increase the adoption of elastomeric infusion pumps for accurate and continuous delivery of drugs in cancer patients, which is expected to propel the market growth over the forecast period.

Moreover, several elastomeric pumps are available for administering chemotherapy and other medications. For instance, Leventon's DOSI-FUSER is an outpatient single-use continuous infusion pump that consists of an elastomeric balloon placed inside a rigid and transparent reservoir, and an infusion line provided with a capillary device and a Luer-Lock connector that connects to the Patient. It is mainly indicated for the administration of chemotherapy, analgesia, and antibiotic therapy.

Therefore, owing to the aforementioned factors, the studied market is expected to grow over the forecast period.

North America Dominates the Market and Expects to do Same Over the Forecast Period

North America dominated the elastomeric infusion pumps market and is expected to continue throughout the forecast period. The factors attributing to the market growth are the increasing incidence of chronic diseases and a growing number of surgical procedures.

The rising number of chronic diseases such as cardiovascular, cancer, diabetes, and others also contribute to the market growth. For instance, according to 2022 statistics published by American Heart Association, the prevalence rate of heart failure in the United States is 6 million, which is 1.8% of the total population, in 2021. Additionally, as per 2022 statistics published by the International Diabetes Federation, in the 10th edition of 2021, 2,974.0 thousand people were living with diabetes in 2021 in Canada. In addition, as per the same source, this number is projected to reach 3,288.2 thousand by 2030 and 3,468.5 thousand by 2045. Therefore, high blood sugar caused by diabetes can damage the nerves that control the heart and blood vessels, leading to a variety of cardiovascular diseases like coronary artery disease and stroke, which can narrow the arteries and necessitate coronary artery bypass grafting. Thus, the rising burden of chronic disease among the population raises the need to deliver continuous medication to the patients which is expected to increase the demand for volumetric infusion pumps or continuous rate elastomeric infusion pumps, which in turn is anticipated to boost the market growth over the forecast period.

In addition, the rising geriatric population who are more prone to develop chronic diseases and other related disorders increases the need for hospitalization or home care drug infusion which is also expected to fuel the market growth. For instance, according to the 2022 statistics published by the United Nations Population Fund, in Canada, a large proportion of the living population is aged 15-64 and accounts for 65% in 2022. In addition, as per the same source, 19% of the population is aged 65 years and above in 2022.

Furthermore, the presence of well-developed healthcare infrastructure, rising healthcare spending in the region, and escalating adoption of advanced technology in infusion pumps contributed to the growth of the market in this region are also contributing to the growth of the market in the region. For instance, according to the Organization for Economic Co-operation and Development (OECD), in June 2022, United States healthcare spending was 17.8% of the total gross domestic product (GDP) of the country, in 2021. Additionally, as per the data published by the Centers for Medicare & Medicaid Services, in March 2022, titled 'CMS Office of the Actuary Releases 2021-2030 Projections of National Health Expenditures', it has been observed that the annual growth in national health spending is expected to average 5.1% over 2021-2030. In addition, the National Health Spending in 2020 was USD 4.1 trillion and it is projected to reach USD 6.8 trillion by 2030. Thus, rising healthcare spending in the region is expected to increase the company's activities for developing advanced products, thereby fueling the market growth.

Moreover, the rising company activities in developing products, increasing product approvals, and escalating adoption of

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advanced technology in infusion pumps are expected to increase the demand for volumetric infusion pumps which in turn is anticipated to propel the market growth over the forecast period. For instance, In April 2020, the United States Food and Drug Administration granted Emergency Use Authorization (EUA) to Braun's Perfusor Space Syringe Infusion Pump, Infusomat Space Volumetric Infusion Pump, and Outlook ES Pump systems for use in the tracheal delivery of continuous nebulized medications into a nebulizer to treat patients of all ages with or suspected of having the Coronavirus Disease 2019 (COVID-19) and to reduce the exposure of healthcare providers (HCP) to such patients.

Therefore, owing to the aforementioned factors, the studied market is expected to grow over the forecast period.

Elastomeric Infusion Pumps Industry Overview

The market is moderately fragmented and competitive. The market players are focusing on new product launches, collaboration, and innovations to expand their market share. The companies operating in the elastomeric infusion systems market are Baxter International, B. Braun Melsungen AG, Avanos Medical, Inc., Nipro Corporation, and Leventon S.A.U among others.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Advancements in Device Technologies and Advantages of the Elastomeric Pumps
 - 4.2.2 Growing Burden of Chronic Diseases
- 4.3 Market Restraints
 - 4.3.1 Safety Issues and Disadvantages Associated with the Pumps
 - 4.3.2 High Cost in Long-Term Use and Strict Regulations
- 4.4 Porter's Five Force Analysis
 - 4.4.1 Threat of New Entrants
 - 4.4.2 Bargaining Power of Buyers/Consumers
 - 4.4.3 Bargaining Power of Suppliers
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value in USD million)

- 5.1 By Product Type
 - 5.1.1 Continuous Rate Elastomeric Infusion Pumps

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5.1.2 Variable Rate Elastomeric Infusion Pumps

5.2 By Application

5.2.1 Pain Management

5.2.2 Chemotherapy

5.2.3 Chelation Therapy

5.2.4 Others

5.3 By End User

5.3.1 Hospitals

5.3.2 Ambulatory Surgical Centers

5.3.3 Others

5.4 Geography

5.4.1 North America

5.4.1.1 United States

5.4.1.2 Canada

5.4.1.3 Mexico

5.4.2 Europe

5.4.2.1 Germany

5.4.2.2 United Kingdom

5.4.2.3 France

5.4.2.4 Italy

5.4.2.5 Spain

5.4.2.6 Rest of Europe

5.4.3 Asia-Pacific

5.4.3.1 China

5.4.3.2 Japan

5.4.3.3 India

5.4.3.4 Australia

5.4.3.5 South Korea

5.4.3.6 Rest of Asia-Pacific

5.4.4 Middle-East and Africa

5.4.4.1 GCC

5.4.4.2 South Africa

5.4.4.3 Rest of Middle-Eastst and Africa

5.4.5 South America

5.4.5.1 Brazil

5.4.5.2 Argentina

5.4.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

6.1 Company Profiles

6.1.1 Ambu A/s

6.1.2 Avanos Medical Inc.

6.1.3 Baxter International Inc.

6.1.4 B. Braun Melsungen AG

6.1.5 Werfenlife SA (LeVenton SAU)

6.1.6 Nipro Corporation

6.1.7 Woo Young Medical Co.

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6.1.8 Epic Medical Pte Ltd

6.1.9 Daiken Medical Co. Ltd

6.1.10 Smiths Medical Inc. (Smiths Group)

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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