

Global Fluid Management Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global Fluid Management Systems Market size is estimated at USD 12.41 billion in 2024, and is expected to reach USD 23.47 billion by 2029, growing at a CAGR of 13.58% during the forecast period (2024-2029).

The outbreak of the COVID-19 pandemic has pushed the medical device industry into action, with a race to develop both therapeutic and preventive devices. Exponentially increasing cases of the coronavirus worldwide are leading to the need for the development of novel treatments, with several clinical trials underway. Meanwhile, the manufacturers of medical devices were highly focused on developing vaccines and drugs, which can also be applied in the diagnosis and treatment of COVID-19, increasing the rate of clinical trials to a great extent. The outbreak of the pandemic has increased the burden of chronic diseases which has eventually increased the demand for minimally invasive procedures. For instance, according to a research paper 'Obesity and activity patterns before and during COVID-19 lockdown among youths in China' published in October 2020, prior to COVID-19, the mean body mass index (BMI) of all youths was 21.8 kg/m², with the prevalence of overweight/obesity and obesity being 21.3% and 10.5%, respectively. But within the month of COVID-19 lockdown, BMI has significantly increased in overall youths and the prevalence of overweight/obesity has significantly increased in China. Thus, the demand for minimally invasive surgery devices for cosmetic procedures is anticipated to increase. Fluid management systems in minimally invasive procedures generally helps to maintain adequate tissue perfusion and oxygen delivery and also provides a fluid vehicle for drug delivery. Therefore, such a scenario indicate considerable growth of the market during pandemic.

The rise in the number of minimally-invasive surgery procedures, rising burden of chronic diseases, and technological advancements are the key drivers for the market. The rise in the number of minimally-invasive surgery procedures and rising burden of chronic diseases are the key drivers for the market. For instance, according to the report published by the International Diabetes Federation in November 2021, around 140,869.6 people are living with diabetes in China age groups ranging from 20 to

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79 years. It also reported that the prevalence rate of diabetes in China was around 10.6% in 2021, whereas in 2011 it was around 8.8%. Furthermore, it also reported that around 72,839.5 people were living with undiagnosed diabetes in 2021. Similarly, according to the report published by the Centers for Disease Control and Prevention (CDC) in 2020, around 5.0% of adults have been diagnosed with emphysema, chronic bronchitis, or chronic obstructive pulmonary disease (COPD). Furthermore, according to the report published by the National Center for Biotechnology Information in January 2022, the global prevalence of Chronic obstructive pulmonary disease (COPD) is around 10.1% in people of aged 40 years or above. Therefore, such factors are anticipated to positively impact the growth of the fluid management systems market over the forecast period.

However, the lack of skilled labors and expensive surgical procedures are likely to impede the market growth over the forecast period.

Fluid Management Systems Market Trends

Cardiology Segment is Expected to Witness Growth Over the Forecast Period

Cardiovascular surgery creates a systemic inflammatory response that increases oxygen consumption and is associated with changes in cardiac output and oxygen delivery. Post cardiac surgery, patients often require several hours of postoperative hemodynamic support while still sedated and intubated in the intensive care unit (ICU), and often require significant amounts of intravenous fluid over a short period of time. Hence, fluid management systems are one of the essential requirements in cardiac procedures.

The increasing cases of cardiovascular diseases across the globe are the major driver for the market. For instance, according to the report published by the Centers for Disease Control and Prevention (CDC) in 2021, each year more than 795,000 individuals in the United States suffer from stroke. Out of these 610,000 suffers from stroke for the first time. Around 87.0% of all strokes are ischemic strokes. Similarly, according to the report published by the Government of the United Kingdom in 2021, it stated that around 210,800 men were offered to screen for aortic aneurysms and around 1,542 aneurysms were detected among them and around 848 men with large aneurysms were referred for surgery. Furthermore, according to the article published by the Centers for Disease Control and Prevention (CDC), titled, 'Heart Disease Facts, around 805,000 Americans have a heart attack every year.

Therefore, due to the above mentioned instances the segment is anticipated to witness considerable growth rate over the forecast period.

North America is Expected to Dominate the Fluid Management Systems Market Over the Forecast Period

North America is expected to dominate the overall fluid management systems market over the forecast period. The growth is due to factors such as the increasing number of cases of chronic diseases, technological advancements, and the rising number of minimally invasive surgical procedures. For instance, as per the report published by the Trust for America's Health Organization in 2020, the United States adult obesity rate represents around 42.4% and it is for the first time the national rate has passed the 40.0% mark. The national adult obesity rate has increased by 26.0% since 2008. In addition, hypertension is one of the major factors contributing to cardiovascular diseases. As per the report published by the Centers for Disease Control & Prevention (CDC) in 2020, around half of the adults in the United States which is around 47.0% have hypertension, defined as a systolic blood pressure greater than 130 mmHg or diastolic blood pressure greater than 80 mmHg or are taking medication for hypertension. Therefore, significant market growth is anticipated in the North American region over the forecast period.

Key product launches, high concentration of market players or manufacturer's presence, and acquisition & partnerships among major players, and increasing cases of chronic diseases in the United States are some of the factors driving the growth of the fluid management systems market in the country. For instance, in August 2022, the Bodyport cardiac scale cleared the United States

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Food and Drug Administration approval for fluid management assessment. The Cardiac Scale solution allows patients with fluid management conditions such as heart failure and kidney disease to non-invasively assess cardiac function and fluid status in the same step taken for weight measurement.

Therefore, owing to the aforesaid factors the growth of the studied market is anticipated in the North America Region.

Fluid Management Systems Industry Overview

The market studied is moderately competitive and there are several global companies that are operating in this industry. The competitive landscape includes an analysis of a few international as well as local companies which hold the market shares and are well known including B. Braun Melsungen AG, Baxter International Inc., Becton, Dickinson and Company, Cardinal Health Inc., Hologic Inc., Johnson & Johnson, Medtronic PLC, Smiths Medical Inc., Smith & Nephew PLC, and Stryker Corporation among others.

Additional Benefits:

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

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