

Global Medical Suction Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 119 pages | Mordor Intelligence

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Report description:

The Global Medical Suction Devices Market size is estimated at USD 1.43 billion in 2024, and is expected to reach USD 1.92 billion by 2029, growing at a CAGR of 5.96% during the forecast period (2024-2029).

The COVID-19 pandemic disrupted lives globally and negatively affected the global economy. During the initial pandemic, demand for suctioning devices fell dramatically as the number of surgeries performed around the world decreased dramatically. For instance, according to an article published by PubMed in May 2021, the first COVID-19 pandemic wave had a significant impact on surgical oncology in Europe, and poorer survival rates were seen among cancer patients due to cancellations of follow-ups and postponements of surgeries. However, the market gradually started to grow as the pandemic progressed because there was an increase in the usage of suction devices by patients in the ICU suffering from COVID-19. For instance, according to an article published by PubMed Central in January 2021, due to a surge in several COVID-19 patients, suctioning systems were recommended. Closed tracheal suctioning systems (CTSS) were also deemed mandatory for ICU patients with an artificial airway. Thus, with the recommendation of medical suction for COVID-19 ICU patients and the resumption of elective surgeries across the world, the market experienced significant growth amid the pandemic and is expected to witness the same during the forecast period.

The market is growing because there are more people with chronic diseases, more people want devices that are small and easy to carry, and more surgeries are being done.

The growing incidence of chronic diseases around the globe is a major factor driving the market's growth. For instance, according to the data published by the American Cancer Society in 2023, it is estimated that over 1.9 million new cancer cases are expected to be diagnosed in the United States in that year. With the number of people with cancer going up, there is more demand for

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surgeries and medical suction devices used in surgeries.

Moreover, as per the British Heart Foundation's 2022 Fact Sheet, 7.6 million people in the United Kingdom were living with heart or circulatory disease in 2022. Due to the high number of people with heart disease, there is likely to be more demand for surgery and medical suction devices across the country. This is likely to drive market growth during the study's forecast period.

Additionally, the large number of surgical procedures taking place around the world is also expected to boost the adoption of suction devices. For example, the OECD reported in 2023 that in 2021, more than 50,597 and 3,619 complete mastectomies were done in Turkey and Portugal, respectively.

In addition, manufacturers are constantly making an effort to develop advanced suction devices. For instance, in November 2021, The Zucker Institute for Applied Neurosciences (ZIAN), a technology accelerator embedded in the Medical University of South Carolina (MUSC), partnered with the South Carolina company Medical Access Partners LLC to commercialize VayuClear. It is a novel surgical suction declogging technology-based device.

Hence, the aforementioned factors, such as the rising prevalence of chronic diseases and the increasing number of surgical procedures, are expected to boost the growth of the studied market. However, the limited reimbursement for suction devices is expected to impede market growth.

Medical Suction Devices Market Trends

Airway Clearing Segment is Expected to Witness Significant Growth Over the Forecast Period

The airway clearing segment is expected to hold a significant market share over the forecast period. When an individual is unable to clear secretions such as saliva and mucus due to a lack of consciousness or an ongoing medical procedure, suction machines help them breathe and maintain a clear airway. There has been an unprecedented surge in airway emergencies after the pandemic, which affected millions of people. This led to a need for more airway suctioning devices, which should help the segment grow in the future.

According to an article updated by NCBI in September 2022, it has been observed that accurate suctioning methods provide patients with a good outcome. Complications are rare with airway clearance suctioning. The same source stated that airway clearance suction is used for indications such as patients with altered mental status or under the effects of sedatives or hypnotics; neuromuscular disease; atonia or hypotonia; and patients with copious respiratory secretions, among other indications.

Moreover, the increasing geriatric population around the world is also expected to boost segment growth, as old age is often associated with severe respiratory diseases. Additionally, as per the CDC update of December 2022, the percentage of adults who have ever been diagnosed with COPD, emphysema, or chronic bronchitis was 4.6% in 2021. Further, the number of visits to emergency departments with COPD as the primary diagnosis was 781,000 in 2021. Thus, with an increase in COPD cases, the demand for airway clearance devices is expected to increase, thereby driving the growth of the segment.

Therefore, the clinical significance of airway suctioning devices and the rising prevalence of respiratory diseases, coupled with the growing geriatric population, are anticipated to boost the growth of the segment. Hence, driving the growth of the studied segment.

North America is Expected to Hold a Significant Share in the Medical Suction Devices Market Over the Forecast Period

Due to the increasing prevalence of chronic diseases in the United States and other countries in the region, North America is one

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of the major contributors to the market's growth.

For instance, according to an article published by the Heart and Stroke Foundation of Canada in February 2022, 750,000 people were living with heart failure (HF) in 2021, and 100,000 people are diagnosed with this incurable condition each year in Canada. HF has become a serious and growing problem in Canada. Additionally, as per the American Heart Association Statistical Update for 2021, the prevalence of heart failure is estimated to be 6 million, which is approximately 1.8% of the total United States population. Also, the same source mentioned that heart failure is more prevalent in older age groups. It is projected to increase steadily through the year 2030, and by that time, the prevalence of HF could reach 8.5% of the total United States population.

Moreover, according to the data stated by the Canadian Cancer Society in November 2022, an estimated 233,900 people were diagnosed with cancer in Canada in 2022, and this growth in incidence is largely due to Canada's growing and aging population. The source also stated that lung, breast, prostate, and colorectal cancers were reportedly the most commonly diagnosed cancers among the population in Canada. Thus, the high prevalence of cancer in Canada is also expected to boost market growth in the region.

Hence, owing to the abovementioned factors, the region is expected to gain market share over the forecast period.

Medical Suction Devices Industry Overview

The Medical Suction Device Market is moderately competitive with the presence of many local players. As a result, players focus on cost reduction and innovation to ensure sustainability. The majority of medical suction devices are produced by global market leaders. Market leaders with more funds for research and a better distribution system have established their positions in the market. Some of the key market players are Precision Medical, Inc., Asahi Kasei Corporation (ZOLL Medical Corporation), INTEGRA Biosciences AG, Olympus Corporation, and Allied Healthcare Products, among others.

Additional Benefits:

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

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