

Spain Hospital Supplies - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Spain Hospital Supplies Market size is estimated at USD 2.68 billion in 2024, and is expected to reach USD 3.57 billion by 2029, growing at a CAGR of 5.90% during the forecast period (2024-2029).

The COVID-19 pandemic had an impact on the country's economy and healthcare system. When the country was placed on lockdown, it affected how medicines, medical supplies, and other biotechnology products were distributed. As a result of the pandemic, most of the hospitals in Spain faced a scarcity of hospital supplies as the patient pool increased abruptly. For instance, as per the article published in April 2021 in PubMed, the reduced hospital bed capacity, the paucity of supplies, and the constrained staffing were the most obvious signs of health system deficiencies that occurred during the pandemic.

Although hospitals were swiftly expanded to accommodate more patients, and medical staff labored ceaselessly for several weeks, the health system was unable to handle the rising demand that was seen during the pandemic's initial peak. However, as the pandemic restrictions eased and the spread of the virus reduced, the market is anticipated to witness growth in the coming years due to the increase in communicable diseases and the rise in awareness about hospital-acquired infections.

Factors such as the increasing prevalence of infectious diseases and the rise in awareness of hospital-acquired infections are expected to boost market growth over the forecast period.

An increase in various infectious diseases like HIV, hepatitis, and common flu is one of the major factors driving the market growth over the forecast period. For instance, as per the Joint United Nations Programme on HIV/AIDS (UNAIDS), Spain Factsheet, 2021, nearly 160,000 adults aged 15 years and above were living with HIV in Spain in 2021. The high prevalence rate of HIV in the country is likely to drive the demand for its monitoring and patient care, thus fueling market growth.

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Additionally, the spread of digital technologies is driving a transformation of the economy and society towards digital media. The rise in product launches and strategic collaborations by the key market players in Spain are expected to rise to boost market growth. For instance, in November 2021, three Spanish hospitals named Hospital 12 de Octubre and Hospital Ramon y Cajal, in Madrid, and Hospital Sant Pau utilized privacy-preserving artificial intelligence for COVID-19 screening. This collaboration aggregated the clinical experience of each hospital to develop automated medical diagnosis models, to facilitate and improve patient care. Similarly, in June 2021, SCGP expanded into the market for lab equipment and medical supplies signing a share purchase contract to purchase an 85% ownership in Spain's Deltalab, S.L.

Thus, increase in chronic diseases, a rise in technological advancements, and product launches in hospital supplies, the studied market is expected to witness notable market growth over the forecast period. However, stringent regulatory frameworks and the emergence of home care services are expected to hinder market growth.

Spain Hospital Supplies Market Trends

Patient Examination Devices Segment is Expected to Hold a Significant Market Share Over the Forecast Period

Patient examination devices include devices such as a stethoscope, thermometer, otoscope, ophthalmoscope, penlight, percussion hammer, and sphygmomanometer. Factors such as the increasing prevalence of chronic disease coupled with increasing investment in patient examination devices are expected to increase the market growth. The growth in the occurrence of cancer and heart diseases is expected to be the key driver of the studied segment. For instance, as per the 'Figures of Cancer in Spain' report 2023, the most frequently diagnosed cancers in Spain in 2023 are expected to be those of the colon and rectum (42,721 cases), breast (35,001), lung (31,282), prostate (29,002) and urinary bladder (21,694). As a result, the high prevalence of cancer cases is likely to increase the demand for patient examination devices, since accurate and routine patient examinations are mandatory for cancer patients.

Moreover, strategic activities like product launches, acquisitions, and partnerships by the key players in patient examination devices are expected to fuel market growth. For instance, in May 2021, Becton Dickinson, and Company planned to set up a USD 200 million drug delivery device manufacturing facility in Zaragoza, Spain. The facility, which will become BD's fourth manufacturing plant in Spain, will focus mainly on the production of prefilled syringes for the European market.

Similarly, in May 2021, Royal Philips and Viamed, one of Spain's private hospital groups, publicized that Philips was selected to install the latest advanced diagnostic imaging solutions in clinical centers throughout Viamed's network, supporting the group's healthcare professionals to further improve patient care. Viamed has a total of 11 hospitals and 15 healthcare centers in the Andalusia, Aragon, Catalonia, La Rioja, Murcia, and Madrid regions of Spain. Hence, such strategic activities by the key players across the studied country are expected to fuel the segment growth over the forecast period.

Also, government funding to support the hospital in purchasing the necessary supplies is expected to drive market growth. For instance, in January 2022, the REACT-EU initiative funded EUR 382.7 million to help Spain's regions fight the coronavirus pandemic and support a digital and green transition. Additionally, from the given fund, EUR 2 million were given to hospitals in Aragon to hire more medical staff and purchase additional equipment. Similarly, in Asturias, EUR 9.9 million was given to support the investments in health, such as hiring staff and the acquisition of medical equipment, infrastructure, and R&D projects.

Hence, increase in chronic diseases, a rise in technological advancements, and product launches in patient examination devices, the studied segment is expected to witness notable market growth over the forecast period.

Syringes and Needles Segment is Anticipated to Witness a Notable Growth in the Spain Hospital Supplies Market Over the

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Forecast Period

The syringes and needles segment is expected to witness significant growth in the market due to the factors such as the rising prevalence of infectious diseases that requires vaccinations coupled with a rise in investment of key players for the production of syringes and needles in Spain. For instance, as per the WHO 2021 Diphtheria vaccination coverage report, 96% population was vaccinated in 2021 in Spain. Hence, for vaccination, syringes and needles are widely utilized and thereby driving the segment growth over the forecast period.

Additionally, strategic activities by the major players, such as product launches, acquisitions, and collaborations, are anticipated to drive market expansion. For instance, in May 2021, BD designed a EUR 165 million (USD 200 million) 'high-tech' manufacturing plant in Zaragoza, Spain. The facility, which is likely to become BD's fourth manufacturing plant in Spain, focuses mainly on the production of prefilled syringes for the European market. The plant is likely to add capacity for the needles and syringes for the portfolio of BD.

Similarly, in January 2021, the Technological Centre for Plastics (Andaltec) in Martos, Spain participated in the development of an innovative syringe carrier for use by healthcare personnel in emergencies. The device, which was invented by nurse Ana Cintora, ensures that prefilled syringes are properly aligned and positioned for the administration of the medication. Hence, such innovations for the convenience of healthcare professionals to carry out day-to-day needs in hospitals are expected to fuel the market growth over the forecast period.

Therefore, increase in infectious diseases, a rise in technological advancements, and product launches, the studied segment is expected to witness significant market growth over the forecast period.

Spain Hospital Supplies Industry Overview

Spain hospital supplies market is moderately competitive. The increasing innovation and rise in investment for various public and private organizations are expected to intensify the industry rivalry across the region. The key players in the market are collaborating with other players, to develop and promote their products, and thus, gain recognition in the market. Some of the major players in the market include GE Healthcare, B Braun SE, 3M, Cardinal Health Inc., and Medtronic PLC, among others.

Additional Benefits:

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

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