

Global Medical Tubing Market - Materials, Structures and Applications

Market Report | 2024-09-26 | 271 pages | Industry Experts

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Report description:

Medical Tubing Market Trends and Outlook

Medical tubing is a flexible, empty tube used in healthcare to transport fluids, gases, or other substances to and from the body. Made from biocompatible substances like silicone, PVC, polyurethane, and thermoplastics, these tubes are crucial in various medical uses, such as intravenous infusion, drainage, catheterization, and surgical procedures. Medical tubing, available in multiple lengths and with single, dual, or triple lumens, is essential in hospitals, clinics, and home healthcare settings for fluid delivery, patient monitoring, and diagnostic imaging, ensuring safe and effective medical care.

The global Medical Tubing market is estimated at US\$13.2 billion in 2024 and is expected to record a CAGR of 7.7% during the 2024-2030 analysis period and stand at a projected US\$20.6 billion by 2030.

The global medical tubing market is significantly driven by the rising demand for minimally invasive medical procedures, which are preferred for their lower costs, faster recovery, and shorter hospital stays than conventional surgeries. The increasing incidence of chronic illnesses like arthritis, cancer, and cardiovascular diseases, which frequently require complex surgeries, has enhanced the demand for these treatments. This trend has led to higher utilization of plastic polymers in the production of catheters and medical tubing, which are essential for various medical equipment. Additionally, market growth is further driven by the growing elderly population requiring regular medical treatments, expanding availability of advanced healthcare facilities, and government initiatives to provide subsidized healthcare.

Medical Tubing Regional Market Analysis

North America holds the dominant position in the medical tubing market, accounting for 43.7% in 2024, due to its advanced healthcare system, leading edge in technology, and strict regulations ensuring safety and quality. Meanwhile, the Asia-Pacific region is projected to be the fastest-growing market, with a CAGR of 9% during the forecast period 2024-2030. This growth is driven by expanding healthcare investments, rising middle-class populations, and increasing healthcare spending. Additionally, advancements in medical technology, a rising demand for minimally invasive procedures, and a growing geriatric population in emerging countries like China, and India further contribute to the market growth.

Medical Tubing Market Analysis by Material Type

Polyvinyl Chloride (PVC) is a leading material in the medical tubing market, with an estimated share of 29.6% in 2024, owing to its affordability, flexibility, and ease of manufacturing. Its low cost and adaptability make it ideal for diverse medical applications, including catheters and complex medical tubing systems, and it is compatible with standard sterilization methods like autoclaving, gamma irradiation, and ethylene oxide (EtO) sterilization, ensuring safety and clinical integrity. Conversely, silicone medical

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tubing is expected to record the fastest CAGR of 8.8% during the 2024-2030 forecast period due to its resistance to extreme temperatures, flexibility, and durability against moisture, chemicals, and UV radiation, making it ideal for high-performance applications.

Medical Tubing Market Analysis by Structure

Single-lumen tubing holds the largest market share at 32.9% in 2024 due to its versatility and wide use in medical procedures like catheters, intravenous sets, and respiratory tubes. Nevertheless, multi-lumen tubing is projected to record the fastest CAGR of 8.8% during the 2024-2030 analysis period. This growth is due to the growing need for advanced medical procedures that demand multiple functions in a single tube, as well as the increasing incidence of chronic diseases that require complex catheterization and infusion therapies.

Medical Tubing Market Analysis by Application

The bulk disposable tubing segment led the market with a 28.9% share in 2024, fueled by increasing disposable incomes, and government healthcare investments focused on improving healthcare quality. The growing demand for disposable medical devices like surgical instruments and syringes further boosts this segment. On the other hand, the drug delivery systems segment is expected to register the fastest CAGR of 8.4% during the forecast period 2024-2030, driven by the increasing demand for targeted and controlled medication distribution, with medical tubes playing a vital role in delivering drugs via various systems, like injectable and respiratory systems.

Medical Tubing Market Report Scope

This global report on Medical Tubing analyzes the market based on material, structure, and application. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2023

Base Year: 2023

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 15+

Medical Tubing Market by Geographic Region

- North America (The United States, Canada, and Mexico)
- Europe (Germany, France, United Kingdom, Italy, Spain, and Rest of Europe)
- Asia-Pacific (Japan, China, India, South Korea, and Rest of Asia-Pacific)
- South America (Brazil, Argentina, and Rest of South America)
- Rest of World

Medical Tubing Market by Material

- Polyvinyl Chloride (PVC)
- Silicone
- Polyolefins
- Polycarbonates
- Fluoropolymers
- Polyimide (Nylon)
- Others (Including Thermoplastic Elastomers (TPE), Thermoplastic Polyurethane (TPU), and other polymers)

Medical Tubing Market by Structure

- Single-Lumen Tubing
- Multi-Lumen Tubing
- Co-Extruded Tubing
- Braided Tubing
- Tapered or Bump Tubing
- Others (Including Balloon Tubing, Coiled or Corrugated Tubing, Heat Shrink Tubing, and more.)

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Medical Tubing Market by Application

- Bulk Disposable Tubing
- Drug Delivery Systems
- Catheters & Cannulas
- Biopharmaceutical Laboratory Equipment
- Other Applications (Including Peristaltic Pump Tubing, Gas Supply Tubing, Smoke Evacuation Tubing, Dialysis Tubing, Infusion and Transfusion Tubing, and Wound Drainage Tubing)

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 - Optinova AB
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 - Saint Gobain
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 - TE Connectivity

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