

**Vascular Access Devices Market by Type (Central (PICC, Tunneled, Non-Tunneled, Port (Conventional, Power)), Peripheral (Venous (PIVC, Midline), Arterial) Intraosseous Device), Route of Insertion (IV, SC, IO), Application, End User - Global Forecast to 2030**

Market Report | 2025-02-21 | 461 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The global Vascular access device market is projected to reach USD 9.05 billion by 2030 from USD 5.99 billion in 2024, at a CAGR of 7.1% during the forecast period.

This is due to increasing adoption of minimally invasive procedure, as the adoption increases the demand for these devices rises. Additionally, increasing government support to build infrastructure for healthcare is increasing, thus rising the number of hospitals, consequently increasing the demand for the vascular access device. However, the high cost associated with replacement and maintenance of vascular access devices and increasing product recalls are the major restraint to the market. Additionally, the shortage of trained healthcare professionals & limited knowledge about the products is major challenge for the market growth. But is creating a conducive environment for market expansion over the forecast period of 2024-2030.

"The central venous access device segment of vascular access device market by type to hold largest position forecast period." Based on the product, the vascular access device market is divided into central venous access device, peripheral vascular access device, intraosseous access device, and accessories. Among these, in 2023 central venous access device segment account for the largest market share of XX% in vascular access device market. This is due to the rising prevalence of chronic diseases such as cancer, chronic kidney disease. Majority of the cancer patients will be given chemotherapy through these central venous access devices, as the chemotherapy drug are potent and should not be given through peripheral line. Thus, majority of the healthcare professionals prefer these devices. Thus, as the prevalence of these diseases is increasing the need for long-term treatment is rising, consequently increasing the demand for vascular access device market. Additionally, central venous access device has lesser adverse reactions compared to other vascular access devices thus fueling the segmental growth.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

"The drug administration segment accounts for the largest market share in vascular access device market."

Based on application, the vascular access device market is segmented into drug administration, fluid and nutrition administration, blood transfusion, and diagnostics & testing. The drug administration segment accounts for the largest market share in vascular access device market due to increasing hospitalization for diseases which require long term drug administration such as antibiotic therapy, pain management, chemotherapy and others. For instance, as per a research article, at least 25% of cancer patients undergo chemotherapy, thus increasing demand for implantable ports, peripherally inserted central catheters and tunneled catheters. Additionally, increasing adoption of tunneled catheters for hemodialysis is supporting the market growth, as these devices does not require any prior procedure to insert the device compared to their alternatives. This segment is again divided into chemotherapy and other drug administration. Among these, in 2023, other drug administration segment to hold the largest market share of XX% in vascular access device market by drug application. This is due to increased prevalence of diseases such as infectious diseases, chronic inflammatory diseases, cardiovascular diseases and among others.

"Asia Pacific accounted for the second largest share of the vascular access device market by region."

The global vascular access device market is segmented into five major regions, namely, North America, Europe, Asia Pacific, Latin America, and Middle East & Africa. Asia Pacific is the second largest regional market for vascular access device equipment and is estimated to grow at the highest CAGR during the forecast period. This is due to increasing prevalence of chronic diseases and rising geriatric population across the region. For instance, as per Asia Development Bank, by 2050, one in four people in Asia and Pacific will be over 60 years old thus contributing to the market growth across the forecast period. Asia Pacific region includes Japan, China, India, Australia, South Korea and Rest of Asia Pacific. Among these, China accounts for the largest market share in vascular access device market in 2023. This is due to increasing aging population and rising number of cancer cases and hospital expansions contribute to the growing market. For instance, as per CEIC data, number of hospitals in China increased from 36,976 in 2022 to 38400 in 2023. As the number of hospitals increases, the demand for vascular access devices continues to grow, to support patients.

A breakdown of the primary participants referred to for this report is provided below:

-□By Company Type: Tier 1-40%, Tier 2-30%, and Tier 3- 30%

-□By Designation: C-level-50%, Director-level-30% and Others-20%

-□By Region: North America-30%, Europe-25%, Asia Pacific-20%, Latin America- 15%, and Middle east and Africa - 10%

Note 1: Note: Companies are classified into tiers based on their total revenue. As of 2023, Tier 1 = >USD 10.00 billion, Tier 2 = USD 1.00 billion to USD 10.00 billion, and Tier 3 = <USD 1.00 billion.

Note 2: C-level primaries include CEOs, CFOs, COOs, and VPs.

Note 3: Others include sales managers, marketing managers, business development managers, product managers, distributors, and suppliers.

The major players operating in the vascular access device market are Becton, Dickinson and Company (US), Teleflex Incorporated (US), ICU Medical, Inc. (US), B. Braun SE (Germany), AngioDynamics, Inc. (US), Medtronic, Plc (Ireland), Merit Medical Systems Inc. (US), Terumo Corporation (Japan), Nipro (Japan), Vygon (France), AMECATH (Egypt), Medical Components, Inc. (US), Healthline Medical Products (US), Cook (US), and Access Vascular, Inc. (US)

Research Coverage

This report studies the vascular access device market based on product, type, end user and region. The report also studies factors (such as drivers, restraints, opportunities, and challenges) affecting market growth and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micro markets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to five major regions (and the respective countries in these regions).

Reasons to Buy the Report

The report will enable established firms as well as entrants/smaller firms to gauge the pulse of the market, which, in turn, would

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

help them to garner a larger market share. Firms purchasing the report could use one or a combination of the below-mentioned strategies for strengthening their market presence.

This report provides insights on the following pointers:

- Analysis of Key drivers (Growing prevalence of lifestyle diseases, increasing number of chemotherapy procedures, growing use of vascular access devices in pediatric patients), restraints (High cost associated with placement and maintenance of vascular access device, product recalls and failures), Challenge (Shortage of skilled professionals, risks associated with vascular access devices), opportunity (Technological Advancements, growth in number of hospitals)
- Market Penetration: Comprehensive information on the product portfolios offered by the top players in the vascular access device market
- Product Development/Innovation: Detailed insights on the upcoming trends, R&D activities, and product launches in the vascular access device market
- Market Development: Comprehensive information on lucrative emerging regions
- Market Diversification: Exhaustive information about new products, growing geographies, and recent developments in the pain management devices market
- Competitive Assessment: In-depth assessment of market segments, growth strategies, revenue analysis, and products of the leading market players.

## **Table of Contents:**

|         |   |    |
|---------|---|----|
| 1       | INTRODUCTION                                  | 41 |
| 1.1     | STUDY OBJECTIVES                              | 41 |
| 1.2     | MARKET DEFINITION                             | 41 |
| 1.3     | STUDY SCOPE                                   | 42 |
| 1.3.1   | SEGMENTS CONSIDERED & GEOGRAPHICAL SPREAD     | 42 |
| 1.3.2   | INCLUSIONS & EXCLUSIONS                       | 43 |
| 1.3.3   | YEARS CONSIDERED                              | 44 |
| 1.3.4   | CURRENCY CONSIDERED                           | 44 |
| 1.4     | STAKEHOLDERS                                  | 45 |
| 1.5     | SUMMARY OF CHANGES                            | 45 |
| 2       | RESEARCH METHODOLOGY                          | 46 |
| 2.1     | RESEARCH DATA                                 | 46 |
| 2.1.1   | SECONDARY DATA                                | 46 |
| 2.1.1.1 | Objectives of secondary research              | 47 |
| 2.1.1.2 | Key secondary sources                         | 47 |
| 2.1.1.3 | Key data from secondary sources               | 48 |
| 2.1.2   | PRIMARY DATA                                  | 48 |
| 2.1.2.1 | Key primary sources                           | 49 |
| 2.1.2.2 | Key objectives of primary research            | 49 |
| 2.1.2.3 | Key data from primary sources                 | 50 |
| 2.1.2.4 | Key industry insights                         | 51 |
| 2.2     | MARKET SIZE ESTIMATION                        | 52 |
| 2.2.1   | SUPPLY-SIDE ANALYSIS (REVENUE SHARE ANALYSIS) | 52 |
| 2.2.2   | TOP-DOWN APPROACH                             | 53 |
| 2.2.3   | COMPANY PRESENTATIONS AND PRIMARY INTERVIEWS  | 53 |
| 2.2.4   | DEMAND-SIDE ANALYSIS                          | 53 |
| 2.3     | GROWTH FORECAST                               | 54 |
| 2.4     | DATA TRIANGULATION                            | 57 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

|         |   |    |
|---------|---|----|
| 2.5     | MARKET RANKING ANALYSIS   | 58 |
| 2.6     | STUDY ASSUMPTIONS   | 58 |
| 2.7     | RESEARCH LIMITATIONS  | 58 |
| 2.7.1   | METHODOLOGY-RELATED LIMITATIONS   | 58 |
| 2.7.2   | SCOPE-RELATED LIMITATIONS   | 59 |
| 2.8     | RISK ANALYSIS   | 59 |
| 3       | EXECUTIVE SUMMARY   | 60 |
| ?       |   |    |
| 4       | PREMIUM INSIGHTS  | 68 |
| 4.1     | VASCULAR ACCESS DEVICES MARKET OVERVIEW   | 68 |
| 4.2     | NORTH AMERICA: VASCULAR ACCESS DEVICES MARKET, BY END USER AND COUNTRY, 2023                | 69 |
| 4.3     | GEOGRAPHIC SNAPSHOT OF VASCULAR ACCESS DEVICES MARKET, 2023                                 | 70 |
| 4.4     | REGIONAL MIX: VASCULAR ACCESS DEVICES MARKET, 2024-2030 (USD MILLION)                       | 71 |
| 4.5     | VASCULAR ACCESS DEVICES MARKET: EMERGING VS. DEVELOPED MARKETS, 2024 VS. 2030 (USD MILLION) | 71 |
| 5       | MARKET OVERVIEW   | 72 |
| 5.1     | INTRODUCTION  | 72 |
| 5.2     | MARKET DYNAMICS   | 72 |
| 5.2.1   | DRIVERS   | 73 |
| 5.2.1.1 | Growing prevalence of lifestyle diseases  | 73 |
| 5.2.1.2 | Increasing popularity of chemotherapy procedures among cancer patients                      | 73 |
| 5.2.1.3 | Rising use of vascular access devices among pediatric patients                              | 73 |
| 5.2.2   | RESTRAINTS  | 74 |
| 5.2.2.1 | High cost of installation and maintenance of vascular access devices                        | 74 |
| 5.2.2.2 | Rising product recalls and failures   | 74 |
| 5.2.3   | OPPORTUNITIES   | 75 |
| 5.2.3.1 | Technological advancements  | 75 |
| 5.2.3.2 | Increasing number of hospitals and expanding patient pool                                   | 75 |
| 5.2.4   | CHALLENGES  | 76 |
| 5.2.4.1 | Shortage of skilled healthcare professionals  | 76 |
| 5.2.4.2 | Risks associated with use of vascular access devices  | 76 |
| 5.3     | TECHNOLOGY ANALYSIS   | 77 |
| 5.3.1   | KEY TECHNOLOGIES  | 77 |
| 5.3.1.1 | Imaging and navigation technologies   | 77 |
| 5.3.1.2 | Catheter securement and stabilization technologies  | 77 |
| 5.3.2   | COMPLEMENTARY TECHNOLOGIES  | 77 |
| 5.3.2.1 | AI and ML   | 77 |
| 5.3.3   | ADJACENT TECHNOLOGIES   | 78 |
| 5.3.3.1 | Infection control technologies  | 78 |
| 5.4     | INDUSTRY TRENDS   | 78 |
| 5.4.1   | MINIMALLY INVASIVE VASCULAR ACCESS PROCEDURES   | 78 |
| 5.4.2   | INNOVATIONS IN CATHETER MATERIALS AND COATINGS  | 78 |
| 5.5     | VALUE CHAIN ANALYSIS  | 79 |
| 5.6     | ECOSYSTEM ANALYSIS  | 80 |
| 5.6.1   | ROLE IN ECOSYSTEM   | 81 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.7 □ SUPPLY CHAIN ANALYSIS □ 82
- ?
- 5.8 □ TRADE ANALYSIS □ 83
- 5.8.1 □ IMPORT DATA FOR HS CODE 901839 □ 83
- 5.8.2 □ EXPORT DATA FOR HS CODE 901839 □ 84
- 5.9 □ PORTER'S FIVE FORCES ANALYSIS □ 85
- 5.9.1 □ THREAT OF NEW ENTRANTS □ 87
- 5.9.2 □ THREAT OF SUBSTITUTES □ 87
- 5.9.3 □ BARGAINING POWER OF BUYERS □ 87
- 5.9.4 □ BARGAINING POWER OF SUPPLIERS □ 87
- 5.9.5 □ INTENSITY OF COMPETITIVE RIVALRY □ 87
- 5.10 □ KEY STAKEHOLDERS & BUYING CRITERIA □ 88
- 5.10.1 □ KEY STAKEHOLDERS IN BUYING PROCESS □ 88
- 5.10.2 □ KEY BUYING CRITERIA □ 89
- 5.11 □ REGULATORY ANALYSIS □ 89
- 5.11.1 □ REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS □ 90
- 5.11.2 □ REGULATORY FRAMEWORK □ 92
- 5.11.2.1 □ North America □ 92
- 5.11.2.1.1 □ US □ 92
- 5.11.2.1.2 □ Canada □ 92
- 5.11.2.2 □ Europe □ 93
- 5.11.2.3 □ Asia Pacific □ 93
- 5.11.2.4 □ Latin America □ 93
- 5.11.2.5 □ Middle East & Africa □ 94
- 5.12 □ PATENT ANALYSIS □ 94
- 5.12.1 □ INSIGHTS: JURISDICTION AND TOP APPLICANT ANALYSIS □ 94
- 5.13 □ PRICING ANALYSIS □ 96
- 5.13.1 □ INDICATIVE PRICING TREND OF VASCULAR ACCESS DEVICES, BY KEY PLAYER, 2021-2023 □ 96
- 5.13.2 □ INDICATIVE PRICING TREND OF VASCULAR ACCESS DEVICES, BY REGION, 2021-2023 □ 97
- 5.14 □ KEY CONFERENCES & EVENTS, 2025-2026 □ 98
- 5.15 □ ADJACENT MARKET ANALYSIS □ 99
- 5.15.1 □ VASCULAR CLOSURE DEVICES MARKET □ 99
- 5.16 □ UNMET NEEDS/END-USER EXPECTATIONS □ 100
- 5.17 □ TRENDS/DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS □ 101
- 5.18 □ INVESTMENT & FUNDING SCENARIO □ 101
- 5.19 □ IMPACT OF AI/GEN AI ON VASCULAR ACCESS DEVICES MARKET □ 102
- 6 □ VASCULAR ACCESS DEVICES MARKET, BY TYPE □ 104
- 6.1 □ INTRODUCTION □ 105
- 6.2 □ CENTRAL VENOUS ACCESS DEVICES □ 105
- 6.2.1 □ PERIPHERALLY INSERTED CENTRAL CATHETERS □ 108
- 6.2.1.1 □ Better durability and increased clinical utility for extended treatment plans to drive segment □ 108
- 6.2.2 □ TUNNELED CATHETERS □ 110
- 6.2.2.1 □ Lower risk of infection and superior longevity to support segment growth □ 110

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.2.3 NON-TUNNELED CATHETERS 112
  - 6.2.3.1 Non-tunneled catheters to be used in critical cases with limited peripheral access 112
- 6.2.4 IMPLANTABLE PORTS 114
  - 6.2.4.1 Implantable conventional ports 117
    - 6.2.4.1.1 Ability to provide reliable venous access with minimal maintenance to spur adoption 117
  - 6.2.4.2 Implantable power injectable ports 119
    - 6.2.4.2.1 Ability to accommodate high-flow fluids and increased demand for chemotherapy to propel market growth 119
- 6.3 PERIPHERAL VASCULAR ACCESS DEVICES 121
  - 6.3.1 PERIPHERAL VENOUS ACCESS DEVICES 124
    - 6.3.1.1 Peripheral intravenous catheters 127
      - 6.3.1.1.1 Cost-effectiveness, ease of placement, and compatibility with different treatments to augment segment growth 127
    - 6.3.1.2 Midline catheters 129
      - 6.3.1.2.1 Ability to provide reliable medium-term intravenous access from one to four weeks to aid segment growth 129
    - 6.3.1.3 Butterfly/Winged steel needles 131
      - 6.3.1.3.1 Precision and comfort in short-term venous access procedures to drive segment 131
  - 6.3.2 PERIPHERAL ARTERIAL ACCESS DEVICES 133
    - 6.3.2.1 Critical role in continuous hemodynamic monitoring and blood sampling in acute care settings to propel segment growth 133
- 6.4 ACCESSORIES 135
  - 6.4.1 NEED FOR ENHANCED FUNCTIONALITY, PATIENT SAFETY, AND PROCEDURAL EFFICIENCY TO DRIVE MARKET 135
- 6.5 INTRAOSSEOUS VASCULAR ACCESS DEVICES 137
  - 6.5.1 CRITICAL ROLE IN EMERGENCY SITUATIONS TO FUEL UPTAKE IN HIGH-STRESS HEALTHCARE FACILITIES 137
- 7 VASCULAR ACCESS DEVICES MARKET, BY ROUTE OF INSERTION 140
  - 7.1 INTRODUCTION 141
    - 7.2 INTRAVENOUS ROUTE OF INSERTION 141
      - 7.2.1 RISING NEED FOR ADMINISTERING ESSENTIAL TREATMENTS DURING ACUTE CARE TO AID MARKET GROWTH 141
    - 7.3 SUBCUTANEOUS ROUTE OF INSERTION 143
      - 7.3.1 REDUCED INFECTION RISK, BETTER PATIENT COMFORT, AND MINIMAL MAINTENANCE TO AUGMENT MARKET GROWTH 143
    - 7.4 INTRAOSSEOUS ROUTE OF INSERTION 145
      - 7.4.1 NEED FOR RAPID AND RELIABLE ACCESS IN CRITICAL EMERGENCIES TO FUEL UPTAKE 145
  - 8 VASCULAR ACCESS DEVICES MARKET, BY APPLICATION 148
    - 8.1 INTRODUCTION 149
      - 8.2 DRUG ADMINISTRATION 150
        - 8.2.1 CHEMOTHERAPY 152
          - 8.2.1.1 Increased incidence of cancer and advancements in oncology care to drive segment 152
        - 8.2.2 OTHER DRUG ADMINISTRATION 154
      - 8.3 FLUID & NUTRITION ADMINISTRATION 156
        - 8.3.1 INCREASING NEED FOR INTRAVENOUS THERAPY IN CHRONIC DISEASES TO SPUR MARKET GROWTH 156
      - 8.4 BLOOD TRANSFUSION 158
        - 8.4.1 FREQUENT NEED FOR BLOOD TRANSFUSION FOR THALASSEMIA AND LYMPHOMA TO BOOST MARKET GROWTH 158
    - 8.5 DIAGNOSTICS & TESTING 160
      - 8.5.1 INCREASING RELIANCE ON ACCURATE DIAGNOSTIC IMAGING, FLUID TESTING, AND PATIENT MONITORING TO AID MARKET GROWTH 160
  - 9 VASCULAR ACCESS DEVICES MARKET, BY END USER 163
    - 9.1 INTRODUCTION 164

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

|          |  |     |
|----------|--|-----|
| 9.2      | HOSPITALS  | 164 |
| 9.2.1    | PUBLIC HOSPITALS   | 165 |
| 9.2.1.1  | Increasing demand for affordable healthcare services in emerging economies to drive segment                  | 165 |
| 9.2.2    | PRIVATE HOSPITALS  | 167 |
| 9.2.2.1  | Rising demand for advanced healthcare services and high-quality treatment options to drive market            | 167 |
| 9.3      | CLINICS & AMBULATORY CARE CENTERS  | 169 |
| 9.3.1    | INCREASING DEMAND FOR OUTPATIENT PROCEDURES AND COST-EFFECTIVE TREATMENTS TO BOOST SEGMENT GROWTH            | 169 |
| 9.4      | OTHER END USERS  | 171 |
| 10       | VASCULAR ACCESS DEVICES MARKET, BY REGION  | 174 |
| 10.1     | INTRODUCTION   | 175 |
| 10.2     | NORTH AMERICA  | 178 |
| 10.2.1   | MACROECONOMIC OUTLOOK FOR NORTH AMERICA  | 178 |
| 10.2.2   | US   | 187 |
| 10.2.2.1 | US to dominate North American vascular access devices market during forecast period                          | 187 |
| 10.2.3   | CANADA   | 194 |
| 10.2.3.1 | Rising cancer prevalence and advanced research initiatives to propel market growth                           | 194 |
| 10.3     | EUROPE   | 202 |
| 10.3.1   | MACROECONOMIC OUTLOOK FOR EUROPE   | 202 |
| 10.3.2   | GERMANY  | 210 |
| 10.3.2.1 | Rising obesity rates and growing geriatric population to augment market growth                               | 210 |
| 10.3.3   | UK   | 217 |
| 10.3.3.1 | Increased disease burden to fuel uptake for advanced vascular access devices for better treatment procedures | 217 |
| 10.3.4   | FRANCE   | 224 |
| 10.3.4.1 | Presence of vascular access device manufacturers and technological advancements to fuel market growth        | 224 |
| 10.3.5   | ITALY  | 231 |
| 10.3.5.1 | Strong government healthcare policies to boost market growth   | 231 |
| 10.3.6   | SPAIN  | 238 |
| 10.3.6.1 | Growing geriatric population and rising incidence of chronic diseases to fuel market growth                  | 238 |
| 10.3.7   | REST OF EUROPE   | 244 |
| 10.4     | ASIA PACIFIC   | 252 |
| 10.4.1   | MACROECONOMIC OUTLOOK FOR ASIA PACIFIC   | 252 |
| 10.4.2   | CHINA  | 261 |
| 10.4.2.1 | Advanced healthcare infrastructure and high geriatric population to support market growth                    | 261 |
| 10.4.3   | INDIA  | 269 |
| 10.4.3.1 | Rising governmental health expenditure and increasing incidence of chronic diseases to fuel market growth    | 269 |
| 10.4.4   | JAPAN  | 276 |
| 10.4.4.1 | Increased geriatric population and high prevalence of cancer to drive market                                 | 276 |
| 10.4.5   | AUSTRALIA  | 283 |
| 10.4.5.1 | Increased demand for hemodialysis and advancements in healthcare infrastructure to propel market growth      | 283 |
| 10.4.6   | SOUTH KOREA  | 290 |
| 10.4.6.1 | Rising burden of chronic diseases and increasing aged population to boost market growth                      | 290 |
| 10.4.7   | REST OF ASIA PACIFIC   | 298 |
| 10.5     | LATIN AMERICA  | 305 |
| 10.5.1   | MACROECONOMIC OUTLOOK FOR LATIN AMERICA  | 305 |
| 10.5.2   | BRAZIL   | 313 |
| 10.5.2.1 | Growing cancer burden and rising need for long-term treatment for chronic patients to drive market           | 313 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

|          |  |     |
|----------|--|-----|
| 10.5.3   | MEXICO   | 320 |
| 10.5.3.1 | Increasing focus on dialysis for patients with chronic kidney diseases to drive adoption of advanced vascular access devices | 320 |
| 10.5.4   | REST OF LATIN AMERICA  | 327 |
|          | ?  |     |
| 10.6     | MIDDLE EAST & AFRICA   | 334 |
| 10.6.1   | MACROECONOMIC OUTLOOK FOR MIDDLE EAST & AFRICA   | 334 |
| 10.6.2   | GCC COUNTRIES  | 342 |
| 10.6.2.1 | Increasing healthcare investments and rising prevalence of chronic diseases to propel market growth                          | 342 |
| 10.6.3   | REST OF MIDDLE EAST & AFRICA   | 349 |
| 11       | COMPETITIVE LANDSCAPE  | 357 |
| 11.1     | INTRODUCTION   | 357 |
| 11.2     | KEY PLAYER STRATEGIES/RIGHT TO WIN   | 357 |
| 11.2.1   | OVERVIEW OF STRATEGIES ADOPTED BY KEY PLAYERS IN VASCULAR ACCESS DEVICES MARKET  | 357 |
| 11.3     | REVENUE ANALYSIS, 2019-2023  | 359 |
| 11.4     | MARKET SHARE ANALYSIS, 2023  | 360 |
| 11.5     | COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023   | 362 |
| 11.5.1   | STARS  | 362 |
| 11.5.2   | EMERGING LEADERS   | 362 |
| 11.5.3   | PERVASIVE PLAYERS  | 362 |
| 11.5.4   | PARTICIPANTS   | 363 |
| 11.5.5   | COMPANY FOOTPRINT: KEY PLAYERS, 2023   | 364 |
| 11.5.5.1 | Company footprint  | 364 |
| 11.5.5.2 | Region footprint   | 365 |
| 11.5.5.3 | Type footprint   | 366 |
| 11.5.5.4 | Route of insertion footprint   | 367 |
| 11.5.5.5 | Application footprint  | 368 |
| 11.5.5.6 | End-user footprint   | 369 |
| 11.6     | COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023   | 370 |
| 11.6.1   | PROGRESSIVE COMPANIES  | 370 |
| 11.6.2   | RESPONSIVE COMPANIES   | 370 |
| 11.6.3   | DYNAMIC COMPANIES  | 370 |
| 11.6.4   | STARTING BLOCKS  | 370 |
| 11.6.5   | COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2023  | 372 |
| 11.6.5.1 | Detailed list of key startup/SME players   | 372 |
| 11.6.5.2 | Competitive benchmarking of key emerging players/startups  | 373 |
| 11.7     | COMPANY VALUATION & FINANCIAL METRICS  | 373 |
| 11.7.1   | FINANCIAL METRICS  | 373 |
| 11.7.2   | COMPANY VALUATION  | 374 |
| 11.8     | BRAND/PRODUCT COMPARISON   | 375 |
| 11.9     | COMPETITIVE SCENARIO   | 376 |
| 11.9.1   | PRODUCT LAUNCHES & APPROVALS   | 376 |
| 11.9.2   | DEALS  | 377 |
| 11.9.3   | OTHER DEVELOPMENTS   | 377 |
| 12       | COMPANY PROFILES   | 378 |
| 12.1     | KEY PLAYERS  | 378 |
| 12.1.1   | BECTON, DICKINSON AND COMPANY  | 378 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

|            |                                  |     |
|------------|----------------------------------|-----|
| 12.1.1.1   | Business overview                | 378 |
| 12.1.1.2   | Products offered                 | 379 |
| 12.1.1.3   | Recent developments              | 384 |
| 12.1.1.3.1 | Deals                            | 384 |
| 12.1.1.4   | MnM view                         | 385 |
| 12.1.1.4.1 | Key strengths                    | 385 |
| 12.1.1.4.2 | Strategic choices                | 385 |
| 12.1.1.4.3 | Weaknesses & competitive threats | 385 |
| 12.1.2     | TELEFLEX INCORPORATED            | 386 |
| 12.1.2.1   | Business overview                | 386 |
| 12.1.2.2   | Products offered                 | 387 |
| 12.1.2.3   | Recent developments              | 390 |
| 12.1.2.3.1 | Product launches                 | 390 |
| 12.1.2.3.2 | Other developments               | 391 |
| 12.1.2.4   | MnM view                         | 391 |
| 12.1.2.4.1 | Key strengths                    | 391 |
| 12.1.2.4.2 | Strategic choices                | 391 |
| 12.1.2.4.3 | Weaknesses & competitive threats | 391 |
| 12.1.3     | ICU MEDICAL                      | 392 |
| 12.1.3.1   | Business overview                | 392 |
| 12.1.3.2   | Products offered                 | 393 |
| 12.1.3.3   | Recent developments              | 396 |
| 12.1.3.3.1 | Deals                            | 396 |
| 12.1.3.4   | MnM view                         | 396 |
| 12.1.3.4.1 | Key strengths                    | 396 |
| 12.1.3.4.2 | Strategic choices                | 396 |
| 12.1.3.4.3 | Weaknesses & competitive threats | 396 |
| 12.1.4     | NIPRO                            | 397 |
| 12.1.4.1   | Business overview                | 397 |
| 12.1.4.2   | Products offered                 | 398 |
| 12.1.4.3   | MnM view                         | 399 |
| 12.1.4.3.1 | Key strengths                    | 399 |
| 12.1.4.3.2 | Strategic choices                | 399 |
| 12.1.4.3.3 | Weaknesses & competitive threats | 399 |
| 12.1.5     | ANGIODYNAMICS, INC.              | 400 |
| 12.1.5.1   | Business overview                | 400 |
| 12.1.5.2   | Products offered                 | 401 |
| 12.1.5.3   | Recent developments              | 402 |
| 12.1.5.3.1 | Product approvals                | 402 |
| 12.1.5.3.2 | Deals                            | 402 |
| 12.1.5.4   | MnM view                         | 403 |
| 12.1.5.4.1 | Key strengths                    | 403 |
| 12.1.5.4.2 | Strategic choices                | 403 |
| 12.1.5.4.3 | Weaknesses & competitive threats | 403 |
| 12.1.6     | VYGON                            | 404 |
| 12.1.6.1   | Business overview                | 404 |
| 12.1.6.2   | Products offered                 | 404 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

|             |  |     |
|-------------|--|-----|
| 12.1.7      | TERUMO CORPORATION                                     | 411 |
| 12.1.7.1    | Business overview                                      | 411 |
| 12.1.7.2    | Products offered                                       | 413 |
| 12.1.8      | MEDTRONIC PLC  | 414 |
| 12.1.8.1    | Business overview                                      | 414 |
| 12.1.8.2    | Products offered                                       | 415 |
| 12.1.9      | COOK   | 417 |
| 12.1.9.1    | Business overview                                      | 417 |
| 12.1.9.2    | Products offered                                       | 417 |
| 12.1.10     | B. BRAUN SE  | 419 |
| 12.1.10.1   | Business overview                                      | 419 |
| 12.1.10.2   | Products offered                                       | 420 |
| 12.1.10.3   | Recent developments                                    | 425 |
| 12.1.10.3.1 | Product launches & approvals                           | 425 |
| 12.1.10.3.2 | Deals  | 426 |
| 12.1.11     | MERIT MEDICAL SYSTEMS, INC.                            | 427 |
| 12.1.11.1   | Business overview                                      | 427 |
| 12.1.11.2   | Products offered                                       | 428 |
| 12.1.11.3   | Recent developments                                    | 429 |
| 12.1.11.3.1 | Deals  | 429 |
| 12.1.12     | AMECATH  | 430 |
| 12.1.12.1   | Business overview                                      | 430 |
| 12.1.12.2   | Products offered                                       | 430 |
| 12.1.13     | MEDICAL COMPONENTS, INC.                               | 433 |
| 12.1.13.1   | Business overview                                      | 433 |
| 12.1.13.2   | Products offered                                       | 433 |
| 12.1.14     | HEALTHLINE MEDICAL PRODUCTS                            | 436 |
| 12.1.14.1   | Business overview                                      | 436 |
| 12.1.14.2   | Products offered                                       | 436 |
| 12.1.15     | ACCESS VASCULAR, INC.                                  | 438 |
| 12.1.15.1   | Business overview                                      | 438 |
| 12.1.15.2   | Products offered                                       | 438 |
|             | ?  |     |
| 12.2        | OTHER PLAYERS  | 439 |
| 12.2.1      | ARGON MEDICAL DEVICES                                  | 439 |
| 12.2.2      | PAKUMEDMEDICAL PRODUCTS GMBH                           | 440 |
| 12.2.3      | GUANGDONG BAIHE MEDICAL TECHNOLOGY CO., LTD.           | 441 |
| 12.2.4      | PFM MEDICAL GMBH                                       | 442 |
| 12.2.5      | MEDI-TECH DEVICES PVT. LTD.                            | 443 |
| 12.2.6      | KIMAL  | 444 |
| 12.2.7      | POLYMEDICURE   | 445 |
| 12.2.8      | DELTAMED   | 446 |
| 12.2.9      | NEWTECH MEDICAL DEVICES PVT. LTD.                      | 447 |
| 12.2.10     | SHANGHAI PUYI MEDICAL INSTRUMENTS CO., LTD.            | 448 |
| 13          | APPENDIX   | 449 |
| 13.1        | DISCUSSION GUIDE                                       | 449 |
| 13.2        | KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL | 457 |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

13.3 CUSTOMIZATION OPTIONS 459  
13.4 RELATED REPORTS 459  
13.5 AUTHOR DETAILS 460

**Vascular Access Devices Market by Type (Central (PICC, Tunneled, Non-Tunneled, Port (Conventional, Power)), Peripheral (Venous (PIVC, Midline), Arterial) Intraosseous Device), Route of Insertion (IV, SC, IO), Application, End User - Global Forecast to 2030**

Market Report | 2025-02-21 | 461 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

**ORDER FORM:**

| Select license | License                 | Price      |
|----------------|-------------------------|------------|
|                | Single User             | \$4950.00  |
|                | Multi User              | \$6650.00  |
|                | Corporate License       | \$8150.00  |
|                | Enterprise Site License | \$10000.00 |
|                |                         | VAT        |
|                |                         | Total      |

\*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

|               |                      |                               |                      |
|---------------|----------------------|-------------------------------|----------------------|
| Email*        | <input type="text"/> | Phone*                        | <input type="text"/> |
| First Name*   | <input type="text"/> | Last Name*                    | <input type="text"/> |
| Job title*    | <input type="text"/> |                               |                      |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address*      | <input type="text"/> | City*                         | <input type="text"/> |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

Zip Code\*

Country\*

Date

2026-03-16

Signature

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)