

Brazil Drug Delivery Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 78 pages | Mordor Intelligence

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Report description:

Brazil Drug Delivery Devices Market Analysis

The Brazil drug delivery devices market size will reach USD 6.08 billion in 2025 and is forecast to attain USD 8.66 billion by 2030, reflecting a steady 7.32% CAGR. Expansion is underpinned by a large chronic-disease population, rapid adoption of connected care technologies, and a supportive industrial policy that targets 70% domestic supply of medical devices by 2033. Demand is strongest for injectable formats used in diabetes and biosimilar therapies, while implantable systems are gaining traction thanks to oncology advances and sustained-release convenience. A parallel boom in home-care and telehealth services is widening access to self-administered devices, even as tariffs and approval timelines lengthen time-to-market for sophisticated electronics. Multinationals still dominate innovation, yet local firms are scaling up under the Nova Industria Brasil program, improving cost competitiveness and resilience

Brazil Drug Delivery Devices Market Trends and Insights

Government Programs Popularizing Adoption of Biosimilar Self-Injection Therapies

National Biosimilar Drug Day, instituted for 16 December 2024, spotlights lower-cost biologics and boosts confidence among prescribers and payers. Sales jumped 43% in 2023 to 892,000 units, reinforcing patient familiarity with pen-style injectors. The Brazilian Society of Rheumatology's interchangeability consensus further validates switching, encouraging procurement bodies to specify self-injectable formats that facilitate out-of-hospital care and improve adherence.

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Government Support for Domestic Manufacturing

Nova Industria Brasil channels BRL 300 billion in soft financing to help local firms meet 70% of national device demand by 2033. Medical-device exports surpassed USD 1 billion in early 2024, confirming capacity gains. ANVISA's June 2024 Reliance Programme fast-tracks registration of devices already cleared abroad, shrinking approval lags for innovators who assemble or finish products on Brazilian soil, and lowering currency risk for hospital buyers.

High Tariffs on Advanced Electronic Delivery Devices Elevating End-User Prices

The post-pandemic restoration of an 11.2% import duty raises landed costs for smart insulin pumps and IoT-enabled adherence tools, with industry association Abimo warning that tariff disputes threaten sector inflation. While domestic assembly offers relief, key electronic sub-components still cross borders, dampening immediate price reductions for patients.

Other drivers and restraints analyzed in the detailed report include:

Rapid Expansion of Health-Insurance Coverage / High Burden of Chronic Disease and Ageing Population / Complex Regulatory Environment and Barriers in Import /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Injectable devices command 44.78% of the Brazil drug delivery devices market, propelled by widespread diabetes self-management programs and fast adoption of biosimilar pens. Government-backed education and free-at-point-of-care distribution inside SUS keep volumes high. However, persistent price gaps between branded pens and potential generics limit uptake in lower-income municipalities. Implantables, though smaller, are accelerating at a 9.47% CAGR as oncologists and ophthalmologists adopt biodegradable reservoirs that maintain therapeutic levels for months, cutting clinic load and boosting patient satisfaction. Optical-segment breakthroughs such as the DDS-25G insert validated safety in Phase I, positioning ocular implants as credible treatment options. Transdermal patches and infusion pumps appeal to elderly cohorts wary of needles, while nasal devices gain niche traction for rescue therapies.

Brazil drug delivery devices market size for implantables is on course to widen its revenue share as hospital formularies recognise long-acting value, and domestic startups exploit policy incentives to scale polymer extrusion lines. Conversely, syringes and conventional pens face commoditisation pressure as local assemblers enter tenders with lower bids.

Injectables remain dominant with 54.56% share due to entrenched physician habits and fast systemic absorption. The Brazil drug delivery devices market share for injectables benefits from 52 approved biosimilars and 30 more under ANVISA review, keeping pipeline richness visible to investors. Novo Nordisk's GLP-1 franchise, supplied via pens and weekly autoinjectors, continues to set therapy benchmarks.

Oral-mucosal routes, projected at an 8.78% CAGR, circumvent hepatic first-pass metabolism and suit paediatric and geriatric populations who struggle with swallowing. Buccal films that release antihypertensive or migraine drugs in minutes attract formulators seeking differentiation. Transdermal patches carry anti-anginal or hormone molecules steadily, while intranasal sprays appeal for seizure clusters. Ocular routes, though niche, gain credibility from domestic R&D alliances that pair biodegradable polymers with anti-VEGF agents for macular diseases.

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The Brazil Drug Delivery Devices Market Report is Segmented by Device Type (Injectable Delivery Devices, Inhalation Delivery Devices, Infusion Pumps and More), Route of Administration (Injectable, Inhalational, Transdermal Patches and More), Application (Cancer, Cardiovascular, Diabetes and More), End User (Hospitals, Ambulatory Surgical Centers, and More). The Market and Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Beckton Dickinson / Pfizer / Novartis / Johnson & Johnson / Sanofi / GlaxoSmithKline / Teva Pharmaceutical Industries / Eurofarma Laboratorios S.A. / Eli Lilly and Company / Roche / AstraZeneca / Bayer / B. Braun / Gerresheimer / West Pharmaceutical Services / Medtronic / Insulet / Ypsomed / Baxter / Cipla / Fresenius /

Additional Benefits:

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

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