

Vein Illuminator - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Vein Illuminator Market Analysis

The Vein Illuminator Market size is estimated at USD 0.3 billion in 2025, and is expected to reach USD 1.04 billion by 2030, at a CAGR of 27.80% during the forecast period (2025-2030). Robust growth reflects health systems' focus on first-attempt venipuncture success, an outcome now tied to U.S. Medicare's value-based purchasing scores. Demand is amplified by aging and obese populations that make traditional vein palpation unreliable, while rising chronic-disease monitoring requires more frequent blood draws. Technology improvements in near-infrared (NIR) imaging, falling component costs, and portable form factors further accelerate adoption. Asia-Pacific's push to localize medical-device manufacturing and China's hospital modernization are tilting future revenue toward cost-optimized systems. Competitive pressure is intensifying as local firms introduce low-price NIR devices that undercut established brands while premium models layer on AI guidance and multi-modal imaging.

Global Vein Illuminator Market Trends and Insights

Rising First-Attempt Success Rates Drive Quality Metrics

Clinical trials in pediatric units showed first-stick success climbing to 74.1% with AccuVein AV400 compared with 40.7% using palpation, trimming procedure time from 169 seconds to 44 seconds. Health-system executives translate these gains directly into higher HCAHPS patient-experience scores, which shape Medicare reimbursements, elevating device purchases to strategic priorities. Patient surveys reveal 93% of respondents rate hospitals higher when staff employ visualization tools.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Growth in Chronic-Disease Blood Draws

More frequent HbA1c, lipid, and renal tests among diabetic and cardiovascular cohorts raise annual venipuncture volumes, stressing phlebotomy capacity. Aging vasculature and drug-induced vein fragility heighten failure risk, prompting facilities to equip labs with portable NIR finders that cut repeat sticks and consumable waste.

High Capital and Per-Unit Device Costs

Premium NIR systems list between USD 4,000 and USD 27,000, squeezing budgets of small hospitals. Experimental open-source models built from recycled optics have demonstrated comparable vein contrast for USD 25, hinting at future price erosion.

Other drivers and restraints analyzed in the detailed report include:

Ageing and Obese Populations Challenge Traditional Methods / Hospital Push for Patient-Experience KPIs / Lack of Reimbursement Codes /

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

Segment Analysis

Near-Infrared Illumination controlled 50.3% revenue in 2024, underpinning the vein illuminator market with a mature, cost-efficient platform. Ultrasound-Augmented units, posting 31.8% CAGR to 2030, carve share in difficult-access patients via deeper imaging and synergy with existing ultrasound carts. Transillumination remains a pediatric niche due to softer light, while multispectral hybrids gain research traction. Patent filings such as the dual-mode VeinCAP system illustrate convergence trends toward single devices offering NIR plus diffuse hyperspectral views. As feature sets widen, vendors differentiate on AI algorithms that auto-grade vein quality and log success metrics to electronic health records.

Hand-held and Portable devices occupied 61.2% of 2024 revenue because nurses favor pocketable tools that shift easily between wards. Wearable and Clip-On Modules, climbing at 34.1% CAGR, free clinicians' hands during complex cannulations, and feed video to smart glasses for teaching. Table-top carts persist in blood banks where mounted cameras stay calibrated for long draws. IoT connectivity is redefining design priorities: next-generation wearables integrate Wi-Fi and cloud dashboards that benchmark first-stick rates, transforming basic lights into quality-management nodes.

Vein Illuminator Market is Segmented by Technology (Near-Infrared (NIR) Illumination, Transillumination, and More), Product Type (Hand-Held and Portable, Table-Top/Cart-Mounted, and Wearable and Clip-On Modules), Application (Intravenous (IV) Access, Blood Draw/Venipuncture Assistance, and More), End-User (Hospitals and Clinics, Blood Donation Camps and Blood Banks, and More), and Geography.

Geography Analysis

North America retained 37.2% 2024 revenue leadership on the back of sophisticated infrastructure and reimbursement programs that pay for patient-experience outcomes. U.S. hospitals embed first-stick statistics into quality dashboards, ensuring repeat device orders. Canada's single-payer system favors province-wide contracts that lower per-unit costs, while Mexico's private medical-tourism clinics install finders as patient-comfort differentiators.

Europe's multi-payer environment produces steady uptake; Germany's university hospitals pilot multi-modal units, and the United

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Kingdom's NHS negotiates bulk pricing to support vascular-access safety goals. CE Mark harmonization smooths cross-border sales and encourages newer entrants from Scandinavia and Eastern Europe.

The vein illuminator market size in Asia-Pacific is expanding at a 33.2% CAGR, making it the global growth engine. India's Production-Linked Incentive scheme subsidizes domestic device plants, reducing import reliance. China's hospital-upgrade program requires equipment that boosts nursing efficiency; local brands undercut imports by bundling visualization with IV kits. Japan's super-aged population and high device standards favor premium dual-mode systems, while South Korea's start-ups test AI-enabled smartphone adapters for home infusion services.

List of Companies Covered in this Report:

AccuVein Inc. / Christie Medical Holdings Inc. / TransLite LLC (Veinlite) / VueTek Scientific LLC / Venoscope LLC / Near Infrared Imaging Inc. / ZD Medical Inc. / VeinSight (Surmount Electronic) / Shenzhen Vivolight Medical Device and Technology Co. / Veincas Medical Ltd. / SIFSOF LLC / NextVein LLC / Infinium Medical Inc. / B. Braun Medical Inc. / Koninklijke Philips N.V. / Siemens Healthineers AG / Baxter International Inc. / GE Healthcare Technologies Inc. / Osang Healthcare Co., Ltd. / Kingmaker Biomedical Inc. / Dhanika Instrument Co. / Zhongke Micro-Light Medical Equipment Co. / YSENMED Medical Equipment Co. / Xavant Medical (Pty) Ltd. / ALEH Medical Laser and Systems / FY Medical Devices Co. /

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Rising first-attempt success rates for IV and phlebotomy
 - 4.2.2 Growth in chronic-disease related blood draws
 - 4.2.3 Ageing and obese populations with difficult venous access
 - 4.2.4 Hospital push for patient-experience KPIs
 - 4.2.5 AI-integrated mobile vein-finder apps
 - 4.2.6 Adoption in cosmetic/aesthetic injections
- 4.3 Market Restraints
 - 4.3.1 High capital and per-unit device costs
 - 4.3.2 Lack of reimbursement codes
 - 4.3.3 Training gaps in low-resource settings
 - 4.3.4 Regulatory ambiguity for aesthetic-only devices
- 4.4 Industry Value Chain Analysis

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 4.5 Regulatory Landscape
- 4.6 Technological Outlook
- 4.7 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.7.1 Bargaining Power of Suppliers
 - 4.7.2 Bargaining Power of Buyers
 - 4.7.3 Threat of New Entrants
 - 4.7.4 Threat of Substitutes
 - 4.7.5 Intensity of Competitive Rivalry
- 4.8 Impact of Macroeconomic Factors on the Market

5 MARKET SIZE AND GROWTH FORECASTS (VALUES)

- 5.1 By Technology
 - 5.1.1 Near-Infrared (NIR) Illumination
 - 5.1.2 Transillumination
 - 5.1.3 Ultrasound-Augmented
 - 5.1.4 Multispectral/Hybrid
 - 5.1.5 Others
- 5.2 By Product Type
 - 5.2.1 Hand-held and Portable
 - 5.2.2 Table-Top/Cart-Mounted
 - 5.2.3 Wearable and Clip-On Modules
- 5.3 By Application
 - 5.3.1 Intravenous (IV) Access
 - 5.3.2 Blood Draw/Venipuncture Assistance
 - 5.3.3 Sclerotherapy and Varicose Vein Treatment
 - 5.3.4 Emergency and Critical Care
 - 5.3.5 Cosmetic/Aesthetic Injections
- 5.4 By End-user
 - 5.4.1 Hospitals and Clinics
 - 5.4.2 Blood Donation Camps and Blood Banks
 - 5.4.3 Ambulatory Surgical Centers
 - 5.4.4 Rehabilitation and Nursing Homes
 - 5.4.5 Academic and Research Institutions
- 5.5 By Geography
 - 5.5.1 North America
 - 5.5.1.1 United States
 - 5.5.1.2 Canada
 - 5.5.1.3 Mexico
 - 5.5.2 South America
 - 5.5.2.1 Brazil
 - 5.5.2.2 Argentina
 - 5.5.2.3 Chile
 - 5.5.2.4 Rest of South America
 - 5.5.3 Europe
 - 5.5.3.1 Germany
 - 5.5.3.2 United Kingdom
 - 5.5.3.3 France

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 5.5.3.4 Italy
- 5.5.3.5 Spain
- 5.5.3.6 Russia
- 5.5.3.7 Rest of Europe
- 5.5.4 Asia-Pacific
 - 5.5.4.1 China
 - 5.5.4.2 India
 - 5.5.4.3 Japan
 - 5.5.4.4 South Korea
 - 5.5.4.5 Malaysia
 - 5.5.4.6 Singapore
 - 5.5.4.7 Australia
 - 5.5.4.8 Rest of Asia-Pacific
- 5.5.5 Middle East and Africa
 - 5.5.5.1 Middle East
 - 5.5.5.1.1 United Arab Emirates
 - 5.5.5.1.2 Saudi Arabia
 - 5.5.5.1.3 Turkey
 - 5.5.5.1.4 Rest of Middle East
 - 5.5.5.2 Africa
 - 5.5.5.2.1 South Africa
 - 5.5.5.2.2 Nigeria
 - 5.5.5.2.3 Rest of Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)
 - 6.4.1 AccuVein Inc.
 - 6.4.2 Christie Medical Holdings Inc.
 - 6.4.3 TransLite LLC (Veinlite)
 - 6.4.4 VueTek Scientific LLC
 - 6.4.5 Venoscope LLC
 - 6.4.6 Near Infrared Imaging Inc.
 - 6.4.7 ZD Medical Inc.
 - 6.4.8 VeinSight (Surmount Electronic)
 - 6.4.9 Shenzhen Vivolight Medical Device and Technology Co.
 - 6.4.10 Veincas Medical Ltd.
 - 6.4.11 SIFSOF LLC
 - 6.4.12 NextVein LLC
 - 6.4.13 Infinium Medical Inc.
 - 6.4.14 B. Braun Medical Inc.
 - 6.4.15 Koninklijke Philips N.V.
 - 6.4.16 Siemens Healthineers AG
 - 6.4.17 Baxter International Inc.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 6.4.18 GE Healthcare Technologies Inc.
- 6.4.19 Osang Healthcare Co., Ltd.
- 6.4.20 Kingmaker Biomedical Inc.
- 6.4.21 Dhanika Instrument Co.
- 6.4.22 Zhongke Micro-Light Medical Equipment Co.
- 6.4.23 YSENMED Medical Equipment Co.
- 6.4.24 Xavant Medical (Pty) Ltd.
- 6.4.25 ALEH Medical Laser and Systems
- 6.4.26 FY Medical Devices Co.

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

7.1 White-Space and Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Vein Illuminator - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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 License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		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"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-03"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scott's-international.com

