

Global Autotransfusion Devices Market: Analysis By Type (Products and Accessories), By Application (Cardiac Surgeries, Orthopedic Surgeries, Trauma Procedure and Others), By End User (Hospitals, Ambulatory Surgeries Centers, and Specialty Clinics), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2027

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Abstracts

The global autotransfusion devices market in 2021 was valued at US\$1.04 billion. The market is anticipated to reach US\$1.44 billion by 2027. Autotransfusion devices are used in medical procedures where the patient's receives his or her own blood back into the body after the due filtration process. To put it another way, the patient becomes his or her own blood donor. The device is simple to use and filters out the infection before transfusing it back into the patient's body.

These devices are widely used in surgical procedures involving cardiac, organ transplantation, and other invasive procedures where there is an excessive blood loss. An increase in accidents, the less availability of rare blood group patients, and high bleeding surgeries are the significant factors boosting to the market growth. The autotransfusion device market is expected to thrive in the near-term years, at a CAGR of 5.53% during the forecast period of 2022-2027.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the autotransfusion devices market into two segments based on types: Product and Accessories. The products are further segmented into intraoperative, postoperative and dual mode. In 2021, the intraoperative

segment lead the autotransfusion product market, accounted for more than 70% share. Intraoperative Product is more thriving in the autotransfusion devices market because they usually helped in open heart surgeries, where blood loss is very high and being an important organ, the blood transfusion needs to be quick to restore the patient's blood loss.

By Application: On the basis of application, the report includes the segmentation into four categories namely Cardiac Surgeries, Orthopedic Surgeries, Trauma Procedures, and Others. Cardiac Surgeries held the major share of approximately 40% share in the autotransfusion devices market. The incidence of cardiac surgeries has increased in the past few years due to the increasing aging population and the rise in diabetic patients. Rise in smoking, high blood pressure, stress, etc. all lead to increase in the global cardiac surgeries autotransfusion devices market.

By End User: The global autotransfusion devices market can be divided into three segments based on end user: Hospital, Ambulatory Surgery Center and Speciality Clinics. The hospitals segment held around 65% of global autotransfusion devices market. In hospitals, many patients walk in for diagnostics and a large number of patients are admitted for surgical procedures. As a result, hospitals currently hold a sizeable share in the market of autotransfusion devices, and this trend is anticipated to persist over the forecast period.

By Region: In the report, the global autotransfusion devices market is divided into four regions: North America, Europe, Asia Pacific, and rest of the world. North America dominated the market in 2021 with more than 40% share of the global market. Factors such as the increasing prevalence of cancer in the US and Canada, rising number of patients suffering from cardiovascular, orthopedic diseases, an increase in the geriatric population, and surging cases of organs transplantation are the key factors driving the North America autotransfusion device market growth.

Asia Pacific is anticipated to grow at the highest CAGR of more than 6% during the forecast period. Various government initiatives have helped in building necessary healthcare infrastructure, empowering healthcare providers and patients to opt for surgeries, hence boosting the demand for autotransfusion devices in the region.

Global Autotransfusion Devices Market Dynamics:

Growth Drivers: One of the most important factors impacting autotransfusion device market growth is rise in organ transplantation. The survival and quality of life of patients

with advanced organ disease gets improved by organ transplantation. However, transplant procedures increase the risk of infection and require a significant investment of resources from the healthcare system. But with the autotransfusion devices, the risk of infection during blood transfusion gets reduced and it filters the blood before transfusing back into the patient's body. Therefore, with the rising number of organ transplants, the demand for autotransfusion devices would grow. Furthermore, the market has been growing over the past few years, due to factors such as growing urbanization, a rise in chronic diseases, increasing healthcare spending, high bleeding surgeries, increasing accident cases, etc.

Challenges: However, the market has been disturbed by some challenges like the removal of the beneficial component from blood during a blood transfusion. During the transfusion of blood, the blood gets through the filtration process before transfusing it into the patient's body. But the filtration process removes the beneficial components of blood like platelets, proteins, albumin, etc. When blood loss is substantial, the removal of these components from blood might cause organ failure. High cost involved also serves as a potential challenge for the autotransfusion devices industry.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as technological developments. Autotransfusion devices are typically used during long-term surgeries, such as kidney transplantation, and in emergency situations. These surgeries increase the risk of excessive blood loss, making it difficult to compensate with new blood, especially in the case of rare blood groups. Because of the high demand, the major players in the autotransfusion devices market provide advanced and fully automated autotransfusion devices that reduce the need for human intervention. As a result, such advancements are likely to usher new trends in the market for autotransfusion devices in the coming years. Another key trend of autotransfusion devices market is increasing market consolidation.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 was reported as an infectious disease with a high mortality rate, and which restricts blood donation activities and make it worse for rare blood group patients. Surgeries like renal surgery, cardiovascular surgery, cancer treatment surgery were cancelled or delayed in fear of COVID-19 infection. As a result, COVID-19 had a short-term detrimental impact on the autotransfusion devices market. After the vaccination schedule was established and the rate of transmission was reduced, healthcare systems were restored to normal. Health care sector are increasingly integrating artificial intelligence to solve the post COVID-19 challenges. Growing aesthetics

awareness, increased surgical adoption, and increased affordability of advanced treatments are expected to drive the growth of the autotransfusion devices market in the post-COVID period.

Competitive Landscape:

The global autotransfusion device market is fragmented, with many players holding trivial market share. The key players of the global autotransfusion device market are:

Medtronic PLC

Fresenius SE & Co.KGaA

Braile Biomedica

Haemonetic Corporation

SARSTEDT AG and Co.KG

Becton, Dickinson & Company

LivaNova PLC

Teleflex Incorporated

Zimmer Biomet Holdings Inc.

ProCell Surgical Inc.

Stryker Corporation

Getinge (Atrium Medical Corporation)

Some of the strategies among key players in the autotransfusion devices market are partnerships, mergers, acquisitions, and collaborations. For Instance, Zimmer Biomet acquired A&E Medical Corporation for US\$150 million in cash at closing and US\$100 million in cash payable in 2021. As per the terms of the acquisition, Zimmer Biomet acquired A&E Medical and its complete portfolio of sternal closure devices – including

sternal sutures, cable systems, and rigid fixation. In October 2019, Medtronic Acquired AV Medical Technologies that operates as a medical device company. Similarly, Getinge acquired Applikon Biotechnology, which deals in developing and supplying advanced bioreactor systems from laboratory scale to production scale in December 2019.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

- 2.1 Autotransfusion Devices: An Overview
- 2.2 Autotransfusion Devices Segmentation: An Overview
 - 2.2.1 Autotransfusion Devices Segmentation

3. GLOBAL MARKET ANALYSIS

- 3.1 Global Autotransfusion Devices Market: An Analysis
 - 3.1.1 Global Autotransfusion Devices Market: An Overview
 - 3.1.2 Global Autotransfusion Devices Market by Value
 - 3.1.3 Global Autotransfusion Devices Market by Type (Product and Accessories)
 - 3.1.4 Global Autotransfusion Devices Market by Application (Cardiac Surgeries, Orthopedic Surgeries, Trauma Procedures, and Others)
 - 3.1.5 Global Autotransfusion Devices Market by End User (Hospital, Ambulatory Surgery Center, Specialty Clinics)
 - 3.1.6 Global Autotransfusion Devices Market by Region (North America, Europe, Asia Pacific, and Rest of World)
- 3.2 Global Autotransfusion Devices Market: Type Analysis
 - 3.2.1 Global Autotransfusion Devices Market by Type: An Overview
 - 3.2.2 Global Autotransfusion Product Market by Value
 - 3.2.3 Global Autotransfusion Product Market by Segments (Intraoperative, Postoperative and Dual Mode)
 - 3.2.4 Global Autotransfusion Product Market Segments by Value
 - 3.2.5 Global Autotransfusion Accessories Market by Value
- 3.3 Global Autotransfusion Devices Market: Application Analysis
 - 3.3.1 Global Autotransfusion Devices Market by Application: An Overview
 - 3.3.2 Global Cardiac Surgeries Autotransfusion Devices Market by Value
 - 3.3.3 Global Orthopedic Surgeries Autotransfusion Devices Market by Value
 - 3.3.4 Global Trauma Procedures Autotransfusion Devices Market by Value
 - 3.3.5 Global Others Autotransfusion Devices Market by Value
- 3.4 Global Autotransfusion Devices Market: End User Analysis
 - 3.4.1 Global Autotransfusion Devices Market by End User: An Overview
 - 3.4.2 Global Hospital Autotransfusion Devices Market by Value
 - 3.4.3 Global Ambulatory Surgery Centers Autotransfusion Devices Market by Value

3.4.4 Global Specialty Clinics Autotransfusion Devices Market by Value

4. REGIONAL MARKET ANALYSIS

4.1 North America Autotransfusion Devices Market: An Analysis

4.1.1 North America Autotransfusion Devices Market: An Overview

4.1.2 North America Autotransfusion Devices Market by Value

4.1.3 North America Autotransfusion Devices Market by Region (The US, Canada, and Mexico)

4.1.4 The US Autotransfusion Devices Market by Value

4.1.5 The US Autotransfusion Devices Market by Type (Accessories, Intraoperative, Postoperative and Dual Mode)

4.1.6 The US Autotransfusion Devices Market Type by Value

4.1.7 The US Autotransfusion Devices Market by Application (Cardiac Surgeries, Orthopedic Surgeries, Trauma Procedures, and Others)

4.1.8 The US Autotransfusion Devices Market Application by Value

4.1.9 Canada Autotransfusion Devices Market by Value

4.1.10 Mexico Autotransfusion Devices Market by Value

4.2 Europe Autotransfusion Devices Market: An Analysis

4.2.1 Europe Autotransfusion Devices Market: An Overview

4.2.2 Europe Autotransfusion Devices Market by Value

4.2.3 Europe Autotransfusion Devices Market by Region (Germany, France, UK, Italy, Spain, and Rest of the Europe)

4.2.4 Germany Autotransfusion Devices Market by Value

4.2.5 France Autotransfusion Devices Market by Value

4.2.6 UK Autotransfusion Devices Market by Value

4.2.7 Italy Autotransfusion Devices Market by Value

4.2.8 Spain Autotransfusion Devices Market by Value

4.2.9 Rest of the Europe Autotransfusion Devices Market by Value

4.3 Asia Pacific Autotransfusion Devices Market: An Analysis

4.3.1 Asia Pacific Autotransfusion Devices Market: An Overview

4.3.2 Asia Pacific Autotransfusion Devices Market by Value

4.3.3 Asia Pacific Autotransfusion Devices Market by Region (Japan, China, India, South Korea, Australia and Rest of Asia Pacific)

4.3.4 Japan Autotransfusion Devices Market by Value

4.3.5 China Autotransfusion Devices Market by Value

4.3.6 India Autotransfusion Devices Market by Value

4.3.7 South Korea Autotransfusion devices Market by Value

4.3.8 Australia Autotransfusion Devices Market by Value

- 4.3.9 Rest of Asia Pacific Autotransfusion Devices Market by Value
- 4.4 Rest of World Autotransfusion devices Market: An Analysis
 - 4.4.1 Rest of World Autotransfusion Devices Market: An Overview
 - 4.4.2 Rest of World Autotransfusion Devices Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19 On Autotransfusion Devices Market
- 5.2 Cancellation of Surgeries during COVID-19
- 5.3 Post COVID-19 Impact on Autotransfusion Device Market

6. MARKET DYNAMICS

- 6.1 Growth Driver
 - 6.1.1 Increasing Healthcare Spending
 - 6.1.2 High Bleeding Surgeries
 - 6.1.3 Increasing Accident Cases
 - 6.1.4 Less Availability of Rare Blood Group
 - 6.1.5 Increasing Prevalence of Chronic Diseases
 - 6.1.6 Rising Number of Transplants
 - 6.1.7 Rapid Urbanization
- 6.2 Challenges
 - 6.2.1 High Cost Involved
 - 6.2.2 Removal of Beneficial Components from Blood
- 6.3 Market Trends
 - 6.3.1 Increasing Market Consolidation
 - 6.3.2 Technological Developments

7. COMPETITIVE LANDSCAPE

- 7.1 Global Autotransfusion Device Market Players by Product Comparison

8. COMPANY PROFILES

- 8.1 Medtronic PLC
 - 8.1.1 Business Overview
 - 8.1.2 Operating Segments
 - 8.1.3 Business Strategy
- 8.2 Fresenius SE & Co. KGaA

- 8.2.1 Business Overview
- 8.2.2 Operating Segments
- 8.2.3 Business Strategy
- 8.3 Braile Biomedica
 - 8.3.1 Business Overview
 - 8.3.2 Business Strategy
- 8.4 Haemonetics Corporation
 - 8.4.1 Business Overview
 - 8.4.2 Operating Segments
 - 8.4.3 Business Strategy
- 8.5 SARSTEDT AG & Co. KG
 - 8.5.1 Business Overview
 - 8.5.2 Business Strategy
- 8.6 Teleflex Incorporated
 - 8.6.1 Business Overview
 - 8.6.2 Operating Segments
 - 8.6.3 Business Strategy
- 8.7 Becton, Dickinson & Company
 - 8.7.1 Business Overview
 - 8.7.2 Operating Segments
 - 8.7.3 Business Strategy
- 8.8 LivaNova, PLC
 - 8.8.1 Business Overview
 - 8.8.2 Operating Segments
 - 8.8.3 Business Strategy
- 8.9 ProCell Surgical Inc.
 - 8.9.1 Business Overview
 - 8.9.2 Business Strategy
- 8.10 Getinge (Atrium Medical Corporation)
 - 8.10.1 Business Overview
 - 8.10.2 Operating Segments
 - 8.10.3 Business Strategy
- 8.11 Stryker Corporation
 - 8.11.1 Business Overview
 - 8.11.2 Operating Segment
 - 8.11.3 Business Strategy
- 8.12 Zimmer Biomet Holdings, Inc.
 - 8.12.1 Business Overview
 - 8.12.2 Operating Segments

8.12.3 Business Strategy

List Of Figures

LIST OF FIGURES

Figure 1: Features of Autotransfusion Devices

Figure 2: Auto Transfusion Segmentation

Figure 3: Global Autotransfusion Devices Market by Value; 2017-2021 (US\$ Billion)

Figure 4: Global Autotransfusion Devices Market by Value; 2022-2027 (US\$ Billion)

Figure 5: Global Autotransfusion Devices Market by Type; 2021 (Percentage, %)

Figure 6: Global Autotransfusion Devices Market by Application; 2021 (Percentage, %)

Figure 7: Global Autotransfusion Devices Market by End User; 2021 (Percentage, %)

Figure 8: Global Autotransfusion Devices Market by Region; 2021 (Percentage, %)

Figure 9: Global Autotransfusion Product Market by Value; 2017-2021 (US\$ Million)

Figure 10: Global Autotransfusion Product Market by Value; 2022-2027 (US\$ Million)

Figure 11: Global Autotransfusion Product Market by Segments; 2021 (Percentage, %)

Figure 12: Global Autotransfusion Product Market Segments by Value; 2021-2027 (US\$ Million)

Figure 13: Global Autotransfusion Accessories Market by Value; 2017-2021 (US\$ Million)

Figure 14: Global Autotransfusion Accessories Market by Value; 2022-2027 (US\$ Million)

Figure 15: Global Cardiac surgeries Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 16: Global Cardiac surgeries Autotransfusion Devices Market by Value; 2022-2027 (US\$ Million)

Figure 17: Global Orthopedic Surgeries Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 18: Global Orthopedic Surgeries Autotransfusion Devices Market by Value; 2022-2027 (US\$ Million)

Figure 19: Global Trauma Procedures Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 20: Global Trauma Procedures Autotransfusion Devices Market by Value; 2022-2027 (US\$ Million)

Figure 21: Global Others Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 22: Global Others Autotransfusion Devices Market by Value; 2022-2027 (US\$ Million)

Figure 23: Global Hospital Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 24: Global Hospital Autotransfusion Devices Market by Value; 2022-2027 (US\$ Million)

Figure 25: Global Ambulatory Surgeries Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 26: Global Ambulatory Surgeries Autotransfusion devices Market by Value; 2022-2027 (US\$ Million)

Figure 27: Global Specialty Clinics Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 28: Global Specialty Clinics Autotransfusion Devices Market by Value; 2022-2027 (US\$ Million)

Figure 29: North America Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 30: North America Autotransfusion Devices Market by Value; 2022-2027 (US\$ Million)

Figure 31: North America Autotransfusion Devices Market by Region; 2021 (Percentage, %)

Figure 32: The US Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 33: The US Autotransfusion Devices Market by Type; 2021 (Percentage, %)

Figure 34: The US Autotransfusion Devices Market Type by Value; 2021-2027 (US\$ Million)

Figure 35: The US Autotransfusion Devices Market by Application; 2021 (Percentage, %)

Figure 36: The US Autotransfusion Devices Market Application by Value; 2021-2027 (US\$ Million)

Figure 37: Canada Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 38: Mexico Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 39: Europe Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 40: Europe Autotransfusion Devices Market by Value; 2022-2027 (US\$ Million)

Figure 41: Europe Autotransfusion Devices Market by Region; 2021 (Percentage, %)

Figure 42: Germany Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 43: France Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 44: UK Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 45: Italy Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 46: Spain Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 47: Rest of the Europe Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 48: Asia Pacific Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 49: Asia Pacific Autotransfusion Devices Market by Value; 2022-2027 (US\$

Million)

Figure 50: Asia Pacific Autotransfusion Devices Market by Region; 2021 (Percentage, %)

Figure 51: Japan Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 52: China Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 53: India Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 54: South Korea Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 55: Australia Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 56: Rest of Asia Pacific Autotransfusion Devices Market by Value; 2021-2027 (US\$ Million)

Figure 57: Rest of World Autotransfusion Devices Market by Value; 2017-2021 (US\$ Million)

Figure 58: Rest of World Autotransfusion Devices Market by Value; 2022-2027 (US\$ Million)

Figure 59: Global Total Cancelled Operations over a 12-week Period of Peak Disruption, by Specialty and Region; 2020 (Thousand)

Figure 60: Global Healthcare Spending Per Head by Region; 2018-2022 (US\$)

Figure 61: Global Number of Transplants by Region; 2020-2021

Figure 62: Global Urban Population; 2015, 2020 & 2050 (Million)

Figure 63: Medtronic PLC Revenue by Segment; 2021 (Percentage, %)

Figure 64: Fresenius SE & Co. KGaA Sales by Segment; 2021 (Percentage, %)

Figure 65: Haemonetics Revenues by Segment; 2022 (Percentage, %)

Figure 66: Teleflex Incorporated Net Revenues by Segments; 2021 (Percentage, %)

Figure 67: Becton, Dickinson & Company Revenues by Segment; 2021 (Percentage, %)

Figure 68: LivaNova PLC Net Sales by Segment: 2021 (Percentage, %)

Figure 69: Getinge Net Sales by Segment; 2021 (Percentage, %)

Figure 70: Stryker Corporation Net Sales by Segment; 2021 (Percentage, %)

Figure 71: Zimmer Biomet Holdings, Inc. Sales by Segment; 2021 (Percentage, %)

Table 1: Global Autotransfusion Device Market Players by Product Comparison

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Product name: Global Autotransfusion Devices Market: Analysis By Type (Products and Accessories), By Application (Cardiac Surgeries, Orthopedic Surgeries, Trauma Procedure and Others), By End User (Hospitals, Ambulatory Surgeries Centers, and Specialty Clinics), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2027

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