

Global Digital Thoracic Drainage Devices Market: Analysis By Type (Single Chamber, and Multiple Chamber), By Application (Thoracic & Pulmonary Surgery, Infectious Diseases, Oncology & Trauma, Cardiac Surgery, and Other Applications), By End User (Hospitals, Ambulatory Surgical Centers, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

The global digital thoracic drainage devices market refers to the market for medical devices used in thoracic surgery and critical care medicine, especially focusing on advanced digital chest drainage systems, and a variety of digital thoracic drainage devices, including standalone units & integrated systems that are used in hospitals, surgical centers, and other healthcare setting. The digital thoracic drainage devices market value stood at US\$167.94 million in 2023, and is expected to reach by US\$238.15 million by 2029.

Digital thoracic drainage systems is a safe, comfortable, and well-tolerated by patients. Global digital thoracic drainage devices market demonstrated a consistent growth, primarily driven by increased thoracic surgery volume, growing demand for minimally invasive surgeries, rising acceptability of digital thoracic drainage systems (DTDS), rise in prevalence of cardiovascular disease globally, and surge in burden of spontaneous pneumothorax. Moreover, DTDS helps reduce or eliminate the cost of hospital stay. In addition, emerging economies, including China, India, South Korea, Brazil, Russia, South Africa, and Turkey, provide significant opportunities for prominent companies in the thoracic drainage devices market owing to their massive population, specifically in

China and India. The market is expected to grow at a CAGR of 6.07% over the projected period of 2024-2029.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the global digital thoracic drainage systems market into two segments on the basis of type: single chamber, and multiple chamber. Single chamber is the largest segment of global digital thoracic drainage devices market owing to frequently use in postoperative care, rising demand for drainage systems in developing countries, increasing consumer focus on minimally invasive procedures, higher prevalence of lung diseases, device's simpler design & ease of use, growing focus of hospitals & healthcare systems on cost reduction, rising healthcare expenditure across globe, limited need for multi-chamber features in certain cases, and ongoing advancements in improving functionality in terms of precise control of suction pressure, real-time monitoring of drainage, and automatic collection and recording of data. Multiple chamber is the fastest growing segment of global digital thoracic drainage devices market as a result of increasing complexity of thoracic surgeries, greater awareness and training among healthcare professionals regarding the benefits and proper use of multiple chamber digital thoracic drainage devices, rising incidence of severe thoracic conditions, and ongoing development of multiple chamber devices with advanced features such as digital readouts, remote monitoring, and automated alerts, making them highly attractive to healthcare providers.

By Application: The report has segmented the global digital thoracic drainage systems market into five applications, namely, thoracic and pulmonary surgery, infectious diseases, oncology and trauma, cardiac surgery, and other applications. Thoracic & pulmonary surgery is the largest and fastest growing segment of global digital thoracic drainage devices market owing to increasing prevalence of lung diseases, rising lifestyle-related cardiovascular disorders, positive shift towards minimally invasive thoracic surgeries such as video-assisted thoracoscopic surgery (VATS) and robotic-assisted procedures, rising need for precise & reliable post-operative management in thoracic surgeries, and reduced risk of complications associated with the use of digital thoracic drainage devices.

By End User: The report provides the bifurcation of the global digital thoracic drainage systems market into three segments on the basis of end user: hospitals, ambulatory surgical centers, and others. Hospitals is the largest and fastest growing segment of global digital thoracic drainage devices owing to high patient population, presence of advanced infrastructure and skilled medical professionals, improved patient outcome of

cardiothoracic surgeries performed in hospitals, enhanced capability of hospitals to handle complex surgeries, provision of around-the-clock care, and extensive use of thoracic drainage devices for various procedures, including surgeries, trauma care, and treatment of thoracic diseases.

By Region: The report provides insight into the global digital thoracic drainage devices market based on regions namely, North America, Europe, Asia Pacific, and rest of the world. North America is the largest region of global digital thoracic drainage devices market as a result of high prevalence of respiratory diseases such as chronic obstructive pulmonary disease (COPD), asthma, and lung cancer, increase in R&D expenditure, early availability of advanced technologies, significant presence of highly structured healthcare industry, availability of well-defined reimbursement policies from private and public health insurance firms, aging population, and the presence of sophisticated healthcare infrastructure and key market participants in the US and Canada. Teleflex Incorporated, Medela, Centese, Inc., and Cardinal Health, Inc., have a strong presence in the US, which is contributing to market growth in North America.

Asia Pacific is the fastest growing region of global digital thoracic drainage devices as a result of high prevalence of chronic respiratory diseases, rapidly expanding medical equipment industry, rising sales of novel devices, burgeoning middle class in populous countries such as China and India, increase in the number of surgical procedures, evolving healthcare reforms, rising penetration of healthcare firms and increasing investments in medical technologies. Also, Asia Pacific is likely to gain market share during the forecast period due to larger cardiovascular disease patient population, increase in the geriatric population, high frequency of infectious diseases, developing healthcare infrastructure, and surge in medical tourism.

Market Dynamics:

Growth Drivers: The global digital thoracic drainage devices market has been rapidly growing over the past few years, due to factors such as aging population, rising prevalence of respiratory and thoracic diseases, growing use of digital medical devices in healthcare sector, positive shift from traditional analog thoracic devices to digital thoracic drainage systems, increased need for digital thoracic drainage post-thoracic surgery, etc. Many respiratory and thoracic conditions, like pleural effusions (fluid buildup around the lungs), pneumothorax (collapsed lung), and empyema (pus collection in the pleural space), require chest drainage to remove excess fluid or air, augmenting the demand for digital thoracic drainage systems acting as an effective means of managing thoracic conditions, thereby addressing a critical unmet need in

respiratory medicine. Moreover, digital systems provide continuous monitoring and automated alerts, reducing the need for manual interventions and decreasing the likelihood of human errors, enhancing patient safety and comfort, and making digital systems a highly preferred choice for healthcare providers. Therefore, increasing use of digital medical devices will continue to revolutionize and boost the growth of the global digital thoracic drainage devices market in the forecasted period.

Challenges: However, the global digital thoracic drainage devices market growth would be negatively impacted by various challenges such as, lack of skilled personnel, high initial cost of digital devices, etc. Digital thoracic drainage devices are more expensive than traditional analog systems, acting as a major barrier for hospitals and healthcare institutions as healthcare facilities, especially those in developing countries or smaller institutions, often operate under tight budget constraints. Allocating funds for expensive medical devices such as digital thoracic drainage systems can be difficult, incentivizing these facilities to prioritize more urgent needs or essential equipment, and hence reduce investment on the newer technology despite its potential benefits.

Trends: The global digital thoracic drainage devices market is projected to grow at a fast pace during the forecasted period, due to increasing integration of AI technologies, rapid evolution of minimally invasive surgical techniques, rising demand for IoT powered thoracic devices, positive shift towards telemedicine and home healthcare, etc. Rising number of minimally invasive surgeries & ongoing advancements in minimally invasive surgical techniques is expected to positively influence the adoption of digital thoracic drainage systems, as there is a positive shift in patient preferences towards less invasive procedures with quicker recovery times. Moreover, continuous monitoring and immediate feedback from digital thoracic drainage devices lead to better patient outcomes. Early detection of complications and timely adjustments in treatment can be made, which is facilitated by the integration of these devices into telemedicine platforms. Therefore, a positive shift towards telemedicine and home healthcare is expected to boost the growth of the global digital thoracic drainage devices market in the forecasted period.

Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. The growth of global digital thoracic drainage devices market was positively impacted during the period 2019-2020, as hospitals witnessed a surge in patients with respiratory issues due to COVID-19, with respiratory complications like

pneumothorax (collapsed lung) and pleural effusion (fluid build-up around the lungs), both requiring chest drainage procedures, increasing the demand for digital chest drainage devices, including digital thoracic drainage devices. In addition, digital thoracic drainage systems offered added advantages in infection control compared to traditional water seal chest drains, as the filtration systems of these systems could potentially block virus-containing aerosols generated during drainage, reducing the risk of healthcare workers contracting COVID-19.

Competitive Landscape:

The global digital thoracic drainage devices market is moderately consolidated, with few players accounting for the majority of market revenue, and competing to offer superior products in the business space. Large market players are focusing on developments such as new product launches, approvals, mergers & acquisitions, partnerships, expansion, and collaborations to stay competitive in the market. The key players of the market are:

Teleflex Incorporated

Getinge AB

Cardinal Health, Inc.

Medtronic PLC

Medela; Centese, Inc.

Rocket Medical plc

Sinapi Biomedical

Redax S.p.A.

ATMOS MedizinTechnik GmbH & Co. KG

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Product name: Global Digital Thoracic Drainage Devices Market: Analysis By Type (Single Chamber, and Multiple Chamber), By Application (Thoracic & Pulmonary Surgery, Infectious Diseases, Oncology & Trauma, Cardiac Surgery, and Other Applications), By End User (Hospitals, Ambulatory Surgical Centers, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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