

Global Medical Refrigerators Market: Analysis By Product Type (Laboratory Refrigerators & Freezers, Blood Bank Refrigerators & Plasma Freezers, Pharmacy Refrigerators & Freezers, Vaccine Refrigerators/Freezers, Cryogenic Freezers & Storage Systems and Others), By Design Type (Countertop Medical Refrigerators, Undercounter Medical Refrigerators, Explosion-Proof Refrigerators, and Flammable Material Storage Medical Refrigerators), By Temperature Control Range (Between -1 to -50°C, Between 2 to 8°C, Between -51 to -150°C, and Below -151°C), By End User (Hospitals and Pharmacies, Blood Banks, Pharmaceutical Companies, Diagnostic Centers, Research Institutes and Others), By Region Size & Forecast with Impact Analysis of COVID-19 and Forecast up to 2028

<https://marketpublishers.com/r/G1701C8C14B4EN.html>

Date: January 2024

Pages: 177

Price: US\$ 2,450.00 (Single User License)

ID: G1701C8C14B4EN

Abstracts

The global medical refrigerators market in 2022 was valued at US\$4.31 billion. The market is expected to be worth US\$6.05 billion in 2028. Medical refrigerators are devices, designed specifically to meet the temperature requirements for safe storage of drugs. Medical refrigerators are used to preserve biological materials which including blood, blood derivatives, biological reagents, vaccines, pharmaceuticals, flammable

compounds, ribonucleic acid (RNA), and deoxyribonucleic acid (DNA). These specialist refrigerators are built to fulfil severe regulatory criteria while also maintaining perfect temperature control, making them an essential component of hospital infrastructure.

The burgeoning prevalence of chronic diseases such as anemia, cancer, diabetes, and cardiovascular diseases (CVDs), resulting in increased the demand for blood and blood products. Blood must be stored properly to preserve its quality and avoid deterioration. As a result, there is a rising need for medical refrigerators with sophisticated features including temperature, humidity, and alarm controls. Moreover, with increasing prevalence of chronic diseases, the need for individualized treatment is also rising which requires preservation of patient-specific samples, such as blood, tissues, and cells. Medical refrigerators offer necessary humidity and temperature regulation to maintain the quality and viability of these samples. Therefore, the burgeoning prevalence of chronic diseases has led to a greater focus on medical refrigerators, thus, boosting the overall market growth. The market is projected to grow at a CAGR of 5.82% during the forecast period of 2023-2028.

Market Segmentation Analysis:

By Product Type: The global medical refrigerators market demand can be divided into six segments based on the product type: Laboratory Refrigerators & Freezers, Blood Bank Refrigerators & Plasma Freezers, Pharmacy Refrigerators & Freezers, Vaccine Refrigerators/Freezers, Cryogenic Freezers & Storage Systems and Others. The laboratory refrigerators & freezers segment generated the highest revenue in 2022. Laboratory refrigerators and freezers are used for preservation of specimen samples, blood samples, blood plasma, and other products including vaccines, syringes, etc. giving it a broad range of applications. Developing biotechnology and pharmaceutical industry along with the growing demand from large healthcare institution to meet the requirement of storing a large volume of samples and pharmaceutical products are the major reasons attributable to this segment's growth.

By Design Type: The report identifies four segments on the basis of design type: Countertop Medical Refrigerators, Undercounter Medical Refrigerators, Explosion-Proof Refrigerators, and Flammable Material Storage Medical Refrigerators. Among the design types, countertop medical refrigerators segment dominated the market in 2022. This market's dominance is attributed to the increasing prevalence of chronic diseases and the rising demand for personalized medicine are driving the growth of the healthcare industry, creating a need for proper storage and preservation of medical

products. In addition, advancements in medical research and development are leading to the introduction of innovative drugs and vaccines, further fueling market growth.

By Temperature Control Range: Based on the temperature control range, the global medical refrigerators market can be divided into four segments namely, Between -1 to -50°C, Between 2 to 8°C, Between -51 to -150°C, and Below -151°C. In 2022, due to the asing demand for reliable cold storage solutions for vaccines and drugs, growing healthcare expenditure, and the rise in chronic diseases, between -1 to -50°C segment leads the market in 2022.

By End User: The report provides the bifurcation of medical refrigerators market into six segments on the basis of end user: Hospitals and Pharmacies, Blood Banks, Pharmaceutical Companies, Diagnostic Centers, Research Institutes and Others. The hospitals and pharmacies segment in the global medical refrigerators market is witnessing robust growth, driven by factors such as increasing rate of organ donation and rapid expansion of healthcare facilities, including hospitals, clinics, and laboratories.

By Region: In the report, the global medical refrigerators market is divided into five regions: North America (The US, Canada and Mexico), Europe (Germany, France, UK, Italy, and Rest of Europe), Asia Pacific (China, Japan, India, South Korea, and Rest of Asia Pacific), Middle East and Africa, and South & Central America. In 2022, the North America region led the medical refrigerators market, propelled by increased application in hospitals, blood banks, research institutes, and biological pharmaceutical businesses to retain biomedical samples at low temperatures in the region and the replacement of older medical refrigerators with newer and more advanced energy-efficient cold storage device. Looking ahead, Asia Pacific is projected to grow significantly from 2023 to 2028, propelled by increasing demand for specialized refrigeration systems for medical applications, rowing pharmaceutical industries and the need to maintain cold chain integrity for vaccines.

During 2023-2028, the US is forecasted to maintain its lead within North America. This trajectory is largely attributed to the country's expansive healthcare system and massive investments in R&D activities to introduce new drug compounds, which, in turn, is driving the growth of ultra-low temperature refrigerators & freezers market in the country.

Market Dynamics:

Growth Drivers: The market has been growing over the past few years, due to factors

such as rise in organ donation, increasing need for safe blood and blood components, burgeoning prevalence of chronic diseases and growth in demand for laboratory equipment in educational institutions. The development of biological and life science-related labs are becoming a top priority for colleges and schools. As a result, there is an increasing demand for laboratory equipment including medical refrigerators to store dead animals, plants and blood samples for research purposes. This is a major factor driving the growth of the medical refrigerator market.

Challenges: However, some challenges are also impeding the growth of the market such as growing inclination towards refurbished equipment and extremely high cost and long life span, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as upswing in the demand for plasma derived medicines, escalating adoption of biopharmaceuticals, surging focus on vaccine storage and distribution, increasing government initiatives and technological advancements and rapid innovations. The medical refrigerators market is experiencing a significant trend with the growing demand for plasma derived medicines. The sale of immunoglobulins is going up because they facilitate the better supervision of patients who are undergoing infusions and are cost effective. The rising demand for plasma derived medicines such as immunoglobulins and clotting factors has boosted the higher need for dependable and effective storage solutions. Most medical refrigerators can maintain a temperature between 36 and 46 degrees Fahrenheit, and are ideal for storing blood, plasma, platelets, vaccines and other biological materials. Furthermore, the growing prevalence of various types of cancers is expected to have beneficial impact on the market's progression.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic had a positive impact on the medical refrigerators market. The pandemic has led to a significant surge in the demand for medical refrigerators to store vaccines, blood, plasma, and other samples that require precise temperature control. For instance, most available COVID-19 vaccines developed must be refrigerated or kept at ultra-low temperatures, boosting related pharmaceutical refrigeration equipment sales. The demand and adoption have been constant throughout the year, and the trend continued well in the first half of 2021. In the post-COVID-19 scenario, this increase in demand for medical refrigerators, lab freezers and lab refrigerators can be expected to continue for the next 3 to 5 years, as COVID-19 vaccination continues to mitigate new emerging variants of the virus and provide booster doses to the population. Moreover,

the rising focus and investment in vaccine development would boost the growth of the clinical research trials for vaccines in the coming years. This, in turn, is anticipated to boost the demand for medical refrigerators, as most vaccines are required to be stored at low temperatures at the time of development and distribution.

Competitive Landscape:

The global medical refrigerators market is highly competitive and fragmented, with several players operating on a regional and global scale. Prominent players are increasingly emphasizing on research and development activities and are investing significantly in the expansion of manufacturing capacities. For instance, in 2021, Haier Biomedical announced the launch of a new range of low-temperature freezers designed for vaccine storage. These freezers feature a temperature range of -86°C to -60°C and have a storage capacity of up to 576 boxes of 2 ml vials. The new range of freezers is aimed at supporting the global COVID-19 vaccine distribution efforts.

Key players of global medical refrigerators market are:

Thermo Fisher Scientific Inc.
Blue Star Limited
Standex International Corporation
Trane Technologies Plc (Helmer Scientific Inc.)
PHC Holdings Corporation
Eppendorf SE
Terumo Corporation
Haier Group (Haier Biomedical)
Godrej Group (Godrej & Boyce Mfg. Co. Ltd.)
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Table 1: Global Medical Refrigerator Market: Recent Developments

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