

Global Total Fluid Management Market: Market Segments: By Product Type [Infusion Therapy Products (Infusion Devices, IV Access devices, IV Solutions and Products), Renal Products (In-Center Hemodialysis Products, Home Hemodialysis (HHD) Products, Peritoneal dialysis Products, Acute Dialysis Products), Endoscopy Fluid Management Products]; By Application (Urology, Cardiology, Orthopedic/Osteology, Neurology, Oncology, Gastroenterology, Others); By End-user (Hospitals, Clinics, Dialysis Centers, Home Care Settings); and Region – Analysis of Market Size, Share & Trends for 2014 – 2019 and Forecasts to 2030

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Abstracts

Product Overview

In order to avoid any problems caused by unwanted amounts of fluid in the body, health and medical facilities use fluid control devices to maintain the right amount of body fluid. It is often used beforehand in the detection of vital medical circumstances to prevent any emergency. The system can perform various functions, such as control of fluid deficits, irrigation of fluids, filtration of fluids, fluid warming, and others. Fluid management systems offer straightforward visualization and are simple to set up and maintain, resulting in decreased downtime between operations.

Market Highlights

Global Total Fluid Management Market is expected to project a notable CAGR of 5.21% in 2030.

Global Total Fluid Management Market to surpass USD 47.2 billion by 2030 from USD 9.49 Billion in 2018 at a CAGR of 5.21% throughout the forecast period, i.e., 2019-30. The demand is driven by factors such as the growing number of minimally invasive operations, technical developments in the fluid management system, and increased government funding and worldwide grants for endosurgical procedures. The increase in End-Stage Renal Disease (ESRD) incidences has driven up demand for dialysis products, thereby growing the global market for fluid management, as well as the increase in the number of surgical procedures, both accessible and minimally invasive, due to improved healthcare facilities, leading to increased demand for fluid management devices. Another sector that attracts leading manufacturers to invent and create new treatment solutions in the field of neurology is cerebrospinal fluid control.

Global Total Fluid Management Market: Segments

Renal products segment to grow with the highest CAGR of 5.51% during 2019-30

Global Total Fluid Management Market is segmented by product type as Infusion Therapy Products (Infusion Devices, IV Access devices, IV Solutions, and Products), Renal Products (In-Center Hemodialysis Products, Home Hemodialysis (HHD) Products, Peritoneal dialysis Products, Acute Dialysis Products, Endoscopy Fluid Management Products. The greater market share in 2018 was accounted for by the infusion therapy segment and is also expected to witness high growth during the forecast period. The standard requirements for infusion therapy are projected to capture a big chunk of the global demand for fluid management, amounting to more than half. The market for infusion therapy is expected to be leveraged by the demand for intravenous administration of fluids and medications to chronically sick and dehydrated patients who do not respond to oral therapy. During the forecast period, forecasts suggest a moderate CAGR of 5.3 percent. However, the renal products segment is catching up, expanding over the forecast period at a CAGR of 5.5 percent. The growing pool of patients undergoing dialysis would lead to the increased use of renal products. This is because, through dialysis procedures such as hemodialysis and peritoneal dialysis, kidney patients need fluid management. Manufacturers of renal goods innovate in renal disposables and ancillaries, saline solutions & concentrates, and dialysis accessories.

Cardiology segment to grow with the highest CAGR of 5.91% during 2019-30

Global Total Fluid Management Market is segmented by applications into urology, gastroenterology, laparoscopy, gynecology/obstetrics, bronchoscopy, arthroscopy, cardiology, neurology, otoscopy, dentistry, and anesthesiology. The greater market

share in 2018 was accounted for by the Cardiology, neurology, and dental applications of fluid management systems segment and is expected to remain dominant over the forecast period. This is due to growing incidences of chronic diseases of the kidneys. This growing number of dialysis procedures is poised to leverage the segment of urology fluid management. Nearly two-fifths of the global fluid management market is projected to be captured, rising at a CAGR of 5.3 percent. The cardiology segment, poised to capture almost a quarter of the global demand for fluid control, is trailing behind. A major growth factor for the cardiology segment is growing morbidities due to cardiac complications.

Global Total Fluid Management Market: Market Dynamics

Drivers

Rising Investments for R&D Activities

In emerging economies such as India and China, this growth of the regional segment can be mainly attributed to the rapidly developing healthcare sector. The government is working towards the construction of a top-notch healthcare system in these countries and is therefore open to foreign investment. This gave the leading players in the global fluid management market a huge business opportunity to build their bases in the region. Besides, increasing investment in accelerating research and development activities in the area is also helping to further fuel the development of the market for fluid management. Heavy investment in medical services, healthcare infrastructure advancement, and the advent of emerging technologies are drivers of global market growth.

Increase in incidence and prevalence of infectious and lifestyle diseases

The demand for dialysis care is motivated by an increase in the incidence and prevalence of infectious and lifestyle diseases, an increase in the number of patients with end-stage renal disease (ESRD), and an increase in the prevalence of diabetes and hypertension. Besides, the rise in medical waste generation is due to the advent of new-generation sensors, single-chip systems, and new-generation components supporting the design and architecture of dialysis machines; an increasingly ageing population with an increase in co-morbidities; an increase in health care expenditure; and the introduction of innovative disease management technologies. These factors are estimated to increase the demand for fluid control in the near future.

Restrain

High cost of treatments

Strict regulatory standards for medical device approval and high costs for procedures such as minimally invasive endoscopic surgeries are likely to narrow the demand for

fluid management globally.

Global Total Fluid Management Market: Key Players

Baxter

Company Overview

Business Strategy

Key Product Offerings

Financial Performance

Key Performance Indicators

Risk Analysis

Recent Development

Regional Presence

SWOT Analysis

C.R. Bard, Inc.

BD Company

Smith & Nephew

B. Braun Holding GmbH & Co. KG

Fresenius SE & Co. KGaA

Cardinal Health Inc.

Stryker

Global Total Fluid Management Market: Regions

Global Total Fluid Management Market is segmented based on regional analysis into five major regions. These include North America, Latin America, Europe, APAC, and MENA.

Global Total Fluid Management Market in North America held the largest market share of XX.X% in the year 2018. It is also predicted that the region will continue to dominate over the given forecast period. The growth of the North American fluid management market is mainly due to the region's high prevalence of chronic kidney disorders. In addition, the increasing acceptance of dialysis treatment procedures, the rise in the number of new product launches, and the increasing per capita income of the population in the area are also some of the other main factors contributing to driving the overall growth of the North American region's fluid management industry. Asia Pacific's geographic segment is projected to be the most exciting business landscape for the development of the global market for fluid management. During the projection era, the Asia Pacific region is expected to display the most promising development.

Competitive Landscape:

Global Total Fluid Management market, which is highly competitive, consists of several

major players such as Fresenius Medical Care AG & Co. KGaA, Baxter International Inc. hold a substantial market share in the Global Total Fluid Management market. Other players analyzed in this report are B. Braun Melsungen AG, Stryker Corporation, Ecolab Inc., Angiodynamics, Inc., Cardinal Health, Inc., Olympus Corporation, Smiths Group PLC, Zimmer Biomet Holdings, Inc., Karl Storz GmbH & Co. Kg, among others.

Global Total Fluid Management Market is further segmented by region into:

North America Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – United States and Canada

Latin America Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – Mexico, Argentina, Brazil, and Rest of Latin America

Europe Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – United Kingdom, France, Germany, Italy, Spain, Belgium, Hungary, Luxembourg, Netherlands, Poland, NORDIC, Russia, Turkey, and Rest of Europe

APAC Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – India, China, South Korea, Japan, Malaysia, Indonesia, New Zealand, Australia, and Rest of APAC

MENA Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – North Africa, Israel, GCC, South Africa, and Rest of MENA

Global Total Fluid Management Market report also contains analysis on:

Global Total Fluid Management Market Segments:

By Product Type:

Infusion Therapy Products

Infusion Devices

IV Access devices

IV Solutions and Products

Renal Products

In-Center Hemodialysis Products

Home Hemodialysis (HHD) Products

Peritoneal dialysis Products

Acute Dialysis Products

Endoscopy Fluid Management Products

By Application:

Urology

Cardiology

Orthopedic/Osteology

Neurology

Oncology

Gastroenterology

Others
By End-user
Hospitals
Clinics
Dialysis Centers
Home Care Settings
Global Total Fluid Management Market Dynamics
Global Total Fluid Management Market Size
Supply & Demand
Current Trends/Issues/Challenges
Competition & Companies Involved in the Market
Value Chain of the Market
Market Drivers and Restraints

Contents

1. EXECUTIVE SUMMARY

2. GLOBAL TOTAL FLUID MANAGEMENT MARKET

- 2.1. Product Overview
- 2.2. Market Definition
- 2.3. Segmentation
- 2.4. Assumptions and Acronyms

3. RESEARCH METHODOLOGY

- 3.1. Research Objectives
- 3.2. Primary Research
- 3.3. Secondary Research
- 3.4. Forecast Model
- 3.5. Market Size Estimation

4. AVERAGE PRICING ANALYSIS

5. MACRO-ECONOMIC INDICATORS

6. MARKET DYNAMICS

- 6.1. Growth Drivers
- 6.2. Restraints
- 6.3. Opportunity
- 6.4. Trends

7. CORRELATION & REGRESSION ANALYSIS

- 7.1. Correlation Matrix
- 7.2. Regression Matrix

8. RECENT DEVELOPMENT, POLICIES & REGULATORY LANDSCAPE

9. RISK ANALYSIS

9.1. Demand Risk Analysis

9.2. Supply Risk Analysis

10. GLOBAL TOTAL FLUID MANAGEMENT ANALYSIS

10.1. Porters Five Forces

10.1.1. Threat of New Entrants

10.1.2. Bargaining Power of Suppliers

10.1.3. Threat of Substitutes

10.1.4. Rivalry

10.2. PEST Analysis

10.2.1. Political

10.2.2. Economic

10.2.3. Social

10.2.4. Technological

11. GLOBAL TOTAL FLUID MANAGEMENT MARKET

11.1. Market Size & forecast, 2019A-2030F

11.1.1. By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

11.1.2. By Volume (Million Units) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12. GLOBAL TOTAL FLUID MANAGEMENT: MARKET SEGMENTATION

12.1. By Regions

12.1.1. North America: By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.1.2. Europe: By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.1.3. Asia-Pacific: By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.1.4. MEA: By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.1.5. Latin America: By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.2. By Product Type: Market Share (2020-2030F)

12.2.1. Infusion Therapy Products, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.2.2. Renal Products, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.2.3. Endoscopy Fluid Management Products, By Value (USD Million) 2019-2030F;
Y-o-Y Growth (%) 2020-2030F

12.3. By Application: Market Share (2020-2030F)

12.3.1. Urology, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.3.2. Cardiology, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%)
2020-2030F

12.3.3. Orthopedic/Osteology, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%)
2020-2030F

12.3.4. Neurology, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.3.5. Oncology, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F

12.3.6. Gastroenterology, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%)
2020-2030F

12.3.7. Others, By Value (USD Million) 2019-2030F; Y-o-Y Growth (%) 2020-2030F
Company Profile

1. FUCHS LUBRICANTS CO.

1. COMPANY OVERVIEW

2. COMPANY TOTAL REVENUE (FINANCIALS)

3. MARKET POTENTIAL

4. GLOBAL PRESENCE

5. KEY PERFORMANCE INDICATORS

6. SWOT ANALYSIS

7. PRODUCT LAUNCH

2. QUAKER HOUGHTON

3. PALL CORPORATION

4. BOCCARD

5. HALLIBURTON

6. FLUID SERVICE PLUS GMBH

7. LOZIER OIL COMPANY

8. TECHENOMICS

9. SLOVNAFT SK

10. OELHELD GMBH

Consultant Recommendation

****The above-given segmentations and companies could be subjected to further modification based on in-depth feasibility studies conducted for the final deliverable.**

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