

Intraosseous Infusion Devices Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

<https://marketpublishers.com/r/ID390ECDF0A0EN.html>

Date: June 2025

Pages: 130

Price: US\$ 4,850.00 (Single User License)

ID: ID390ECDF0A0EN

Abstracts

The Global Intraosseous Infusion Devices Market was valued at USD 949.1 million in 2024 and is estimated to grow at a CAGR of 5.8% to reach USD 1.66 billion by 2034. Intraosseous infusion devices are designed for rapid administration of fluids, medications, and blood products directly into the bone marrow, particularly when conventional intravenous access proves to be delayed or ineffective. These devices are essential in critical medical emergencies, offering dependable vascular access when time is limited or peripheral veins are inaccessible due to physiological constraints or patient conditions.

Their rapid action and reliability make them a cornerstone in emergency medical protocols across various healthcare environments. They are widely used in trauma cases, shock management, and dehydration emergencies where quick intervention can significantly impact patient outcomes. Healthcare professionals in emergency departments, ambulance services, and field medical units rely on these devices for efficient resuscitation and drug delivery, especially in time-sensitive scenarios. The expanding use of intraosseous access has also been supported by increasing emphasis on training programs and protocol integration across both civilian and military medical services. Their compact build, portability, and ease of use have further propelled adoption beyond traditional hospital settings, enabling wider deployment in remote and pre-hospital care.

The market is segmented by product type into battery-powered, manual IO needles, or automatic devices, and impact-driven systems. In 2024, the battery-powered/automatic devices segment captured the largest revenue share, reaching USD 457.8 million. These devices have become the go-to solution in emergency care due to their speed

and ease of deployment, often proving more efficient than their manual counterparts. Automatic intraosseous systems offer a reliable alternative when conventional intravenous routes are not an option, especially under high-pressure circumstances. Their design requires minimal training while still delivering high first-attempt success rates, making them a preferred tool in emergency vehicles, air ambulances, and military operations. Their performance in extreme conditions has boosted adoption across healthcare systems worldwide, further reinforced by investments from governments to enhance emergency readiness and combat care systems.

By age group, the market is categorized into adult and pediatric patients. In 2024, pediatric patients accounted for the majority share, commanding 68.2% of the total market. Establishing vascular access in young patients, especially infants and neonates, often presents unique challenges due to small and fragile veins. Intraosseous infusion offers an effective alternative, allowing medical professionals to administer life-saving treatments quickly and reliably. As a result, the demand for pediatric-specific intraosseous devices has grown across intensive care units, ambulatory services, and emergency departments. Global standards for pediatric emergency response increasingly incorporate intraosseous access as a frontline intervention, which has encouraged healthcare facilities to invest in compatible equipment and comprehensive training programs focused on pediatric care.

In terms of end use, the market is segmented into hospitals and clinics, ambulatory surgical centers, and other settings. The hospitals and clinics segment held the leading position in 2024 and is expected to maintain strong growth over the coming years. Rising cases of trauma, cardiac arrest, and critical conditions such as sepsis and hypovolemic shock have intensified the need for swift and reliable vascular access solutions in inpatient and emergency environments. Intraosseous infusion has become a critical option in scenarios where intravenous access is either delayed or unachievable, especially in patients who are critically ill or whose veins are hard to locate. Major healthcare organizations have integrated intraosseous devices into their emergency care protocols, further accelerating their presence across hospitals and trauma centers globally.

North America led the global market in 2024, with a total valuation of USD 424.2 million. This leadership is supported by advanced healthcare infrastructure and a high volume of emergency procedures across the region. In the United States, the market grew from USD 365.5 million in 2023 to USD 382.9 million in 2024. High demand stems from the need to handle a wide range of emergency cases that require immediate vascular

access, especially in patients for whom intravenous methods are not viable. These devices have become a vital component of emergency medical protocols, offering a dependable alternative across a spectrum of clinical use cases.

The global competitive landscape features a mix of well-established players and emerging companies. Key participants such as Pyng Medical, Teleflex, Dickinson and Company, PerSys Medical, Becton, and Cardinal Health collectively accounted for around 70% of global revenue in 2024. These companies are actively expanding through acquisitions, product innovations, and strategic partnerships to reinforce their market share. At the same time, several regional and local manufacturers are penetrating the market by offering cost-effective alternatives. Competitive dynamics are further intensified by a surge in mergers, new product rollouts, and regional expansion initiatives aimed at broadening customer bases and enhancing product accessibility.

Companies Mentioned

Aero Healthcare , Becton, Dickinson and Company , Biopsybell , Bound Tree Medical , Cardinal Health , Cook Medical , Henry Schein , Implox , PAVmed , PerSys Medical , Pyng Medical , SAM Medical , Sarnova , Teleflex , Vidacare

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