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Intravenous (IV) Solutions Market Analysis by Type [Total Parenteral Nutrition (TPN), Peripheral Parenteral Nutrition (PPN)], Nutrients (Carbohydrates, Parenteral Lipid Emulsion, Single Dose Amino Acid Solution, Vitamins & Minerals (Salt and electrolyte)) And Segment Forecasts to 2024

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Abstracts

The global IV solutions market was valued at USD 6.9 billion in 2015 and is expected to reach a value of USD 13.79 billion by 2024. Key factors driving market expansion include the rapidly increasing natality rate including a high percentage of premature births and malnutrition.

Growing incidence rate of chronic diseases, such as cancer, is also fueling the demand for Total Parenteral Nutrition (TPN), which forms a vital part of the treatment. Intravenous nutrition helps sustain strength, maintains hydration levels in patients, and facilitates faster recovery. Cancer prevalence is forecasted to grow by 70% over the next few decades. This poses a colossal growth prospect for the market.

The regulatory bodies are approving high-quality products complying with faster patient recovery. In May 2016, Amanta Healthcare received approval for NaCl injection BP and Sterile water injection BP products. These products obtained Therapeutic Goods Administration approval granted by the Australian government.

The reimbursement scenario for IV nutrition is promising. In the U.S., Medicare covers up to 80% of the expenses of parenteral and enteral nutrition including physician services, medical equipment, and other related medical services. In the developing countries, increasing purchasing power compensates for the absence of reimbursement

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coverage thus sustaining the growth of this vertical.

Further Key Findings From the Study Suggest:

TPN dominated the market in 2015. TPN is administered to patients who are ‘nil by mouth’ or are afflicted with dysfunctional digestive systems. Around 2000 elderly deaths occur per annum due to malnutrition. With rising geriatric population and chronic, but manageable diseases, the demand for TPN is projected to grow over the forecast period.

In 2015, North America dominated the market with a revenue share of around 40%. The region has a large geriatric population base comprising 45% long-term care residents and 40% hospitalized, elderly patients suffering from malnutrition. Moreover, in 2014, the region experienced a sharp shortage of IV fluids due to increased hospitalization of influenza patients. In response to the deficit, FDA initiatives were directed toward expediting the application review process and identifying potential new manufacturers.

Asia Pacific is expected to emerge as the fastest growing region. The rising geriatric population in Japan and China, increasing tendencies of unhealthy food consumption, and low level of awareness is expected to promote the emergence of IV solutions market in this region.

Fresenius Kabi AG, Baxter, B. Braun Melsungen AG, and Hospira are few players operating in the market. Mergers and acquisitions are certain strategic initiatives undertaken by the companies. For instance, Claris-Otsuka is a joint venture between Claris Lifesciences Ltd., Otsuka Pharmaceutical Co., Ltd., and Mitsui & Co., Ltd., Japan established in 2012. This joint venture focused on the manufacturing and marketing activities for IV nutrition products and offers products in various IV delivery systems.

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Contents

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CHAPTER 5 MARKET CATEGORIZATION 2: NUTRIENT ESTIMATES & TREND ANALYSIS

CHAPTER 6 MARKET CATEGORIZATION 3: REGIONAL ESTIMATES & TREND ANALYSIS, BY TYPE & NUTRIENT

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List Of Tables

LIST OF TABLES

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TABLE 38 South Africa IV solutions market estimates and forecasts, by nutrient, 2013 - 2024 (USD Million)

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List Of Figures

LIST OF FIGURES

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