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U.S. Vascular Device Market

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Abstracts

The vascular access device market report includes units sold, market value, forecasts, as well as detailed competitive market shares and analyses of major players' success strategies in each market and segment. Scope 2010 - 2020. The market is segmented into the following main markets: implantable ports, port or Huber needles, central venous catheters (CVCs), dialysis catheters, peripherally inserted central catheters (PICCs) and peripheral intravenous catheters (PIVCs). The market also includes hand-carried and portable ultrasound systems, ultrasound guidance systems used for vascular access, catheter securement devices, and syringes & needles.

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Peripherally Inserted Central Catheter Market

Peripheral Intravenous Catheter Market

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Syringe and Needle Market

Research Methodology

This report analyzes and evaluates the current state of the market including existing and potential markets, product average selling prices, and unit volumes. The report also highlights the opportunities and potential hazards involved, and presents strategies for successfully navigating the market landscape. Furthermore, it seeks to identify the trends and technologies that will affect the future of each market segment and prepares an unbiased critical assessment of such market drivers and limiters based on our “ground up” approach, which includes primary and secondary research methods.

Abstract

The vascular access device market in the U.S. includes implantable ports, port or Huber needles, central venous catheters (CVCs), dialysis catheters, peripherally inserted central catheters (PICCs) and peripheral intravenous catheters (PIVCs). The market also includes hand-carried and portable ultrasound systems, ultrasound guidance systems used for vascular access, catheter securement devices, and syringes & needles.

The market will grow due to a combination of increasing patient population and the shift

towards technologically advanced devices that will continue to gain market share at the expense of older, less expensive devices.

The increasing affordability of power-injectable implantable ports is leading to a shift towards the exclusive use of power-injectable devices.

Power-injectable implantable ports are gaining market share at the expense of conventional implantable ports. While power-injectable implantable ports are more expensive than conventional implantable ports, physicians are erring on the side of caution and choosing to place a power-injectable port. In the event that a CT scan is required, it is more convenient and cost-effective to place a power-injectable implantable port.

Since implantable ports are placed for a longer time than PICCs and CVCs, the likelihood of requiring a CT scan is significant. Moreover, having to insert only one implantable port lessens the chances of a patient developing a bloodstream infection, a needlestick injury occurrence, and also frees up more time for nurses and physicians to complete other tasks.

The demand for antimicrobial and multi-lumen CVCs in the acute setting will lead to overall growth in the CVC market. The use of central venous catheters (CVCs) in the U.S. varies greatly from setting to setting. In the neonatal intensive care unit (NICU), if arterial and venous umbilical catheters are also considered, 100% of NICU patients will have a CVC placed at some point during their stay. In intensive care units (ICUs) or critical care units (CCUs), approximately 50% of patients will receive a central venous catheter.

While overall unit sales of PICCs have flattened over the last several years, the overall PICC market continued to benefit from the shift towards power-injectable PICCs. Moreover, companies that develop new products are able to garner a premium on the market. Historically, power-injectable PICCs were used with patients who had a high probability of receiving a CT scan. However, clinicians are now utilizing power-injectable PICCs for patients who may require imaging in the future. Power-injectable PICCs are rapidly becoming the standard of care for U.S. patients.

The continuing shift towards safety devices will cause the peripheral intravenous catheter market to grow over the forecast period. Moreover, midlines are set to re-emerge as a suitable alternative to short PIVCs. The midline catheter market will cannibalize a portion of existing PIVC sales in addition to the sales of PICCs.

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Highlights

Provides market information and competitive analysis on re-emerging midline catheter market.

Shows changes in the prices and penetration rate for power-injectable and safety devices.

Descriptive and qualitative information for the market drivers and limiters for each segment

Full competitive analysis of leading competitors

Contain appendix with global glass and plastic prefilled syringe markets.

Provides segmentation on several levels, including by setting, lumen count, power/non-power, operator, patient.

Companies

Becton Dickinson
C. R. Bard
Covidien
Teleflex Medical
Smiths Medical
SonoSite
GE Healthcare
AngioDynamics
Medcomp
B. Braun
Centurion
Terumo Medical

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