

ASEAN Infusion Pump - Company Evaluation Report, 2025

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Abstracts

The ASEAN Infusion Pump Companies Quadrant is a comprehensive industry analysis that provides valuable insights into the global market for ASEAN Infusion Pump. This quadrant offers a detailed evaluation of key market players, technological advancements, product innovations, and emerging trends shaping the industry. MarketsandMarkets 360 Quadrants evaluated over 140 companies, of which the Top 15 ASEAN Infusion Pump Companies were categorized and recognized as quadrant leaders.

The ASEAN infusion pumps market is experiencing significant growth, driven by the rising burden of chronic diseases, expanding healthcare infrastructure, and increasing demand for advanced drug delivery systems. As conditions such as cancer, diabetes, and renal failure become more prevalent across Southeast Asia, hospitals and clinics are increasingly adopting infusion pumps to ensure precise and controlled medication delivery. Countries like Indonesia, Vietnam, Thailand, and the Philippines are rapidly modernizing their healthcare systems, with substantial investments in hospital equipment and critical care technologies further supporting market expansion.

A major growth factor is the region's aging population, which is more susceptible to chronic illnesses requiring long-term intravenous therapies. This demographic shift is fueling consistent demand for infusion pumps in both hospital and homecare settings. In parallel, governments across the ASEAN region are prioritizing healthcare system improvements, leading to increased public and private investments in medical technologies, including infusion systems. Additionally, the availability of cost-effective, locally manufactured infusion devices is making advanced care more affordable and accessible in price-sensitive markets, promoting broader adoption in both urban and rural healthcare facilities.

The 360 Quadrant maps the ASEAN Infusion Pump companies based on criteria such as revenue, geographic presence, growth strategies, investments, and sales strategies for the market presence of the ASEAN Infusion Pump quadrant. The top criteria for product footprint evaluation included By Product (Accessories and Consumables, Devices), By Application (Chemotherapy/Oncology, Diabetes Management, Gastroenterology, Analgesia/Pain Management, Analgesia/Pain Management, Hematology, Other Applications), and By End User (Hospitals, Home Care Settings, Ambulatory Care Settings, Academic & Research Institutes).

Key Players

Key players in the ASEAN Infusion Pump market include major global corporations and specialized innovators such as Becton, Dickinson and Company (US), B. Braun Melsungen AG (Germany), Baxter International (US), Fresenius Kabi (Germany), Terumo Corporation (Japan), ICU Medical, Inc. (US), Roche Diagnostics (Switzerland), Nipro (Japan), Cardinal Health, Inc. (US), Abbott Laboratories (US), Danaher Corporation (US), Medtronic plc (Ireland), Ypsomed Holding AG (Switzerland), JMS Co., Ltd. (Japan), and Avanos Medical, Inc. (US). These companies are actively investing in research and development, forming strategic partnerships, and engaging in collaborative initiatives to drive innovation, expand their global footprint, and maintain a competitive edge in this rapidly evolving market.

Top 3 Companies

Becton, Dickinson and Company

Becton, Dickinson and Company—commonly known as BD—is a global medical technology company that develops, manufactures, and sells medical devices, instrument systems, and reagents for healthcare institutions, life science researchers, clinical laboratories, and the pharmaceutical industry. The company operates through three main business segments: BD Medical, BD Life Sciences, and BD Interventional. The BD Medical segment, operations are further divided into four business units: Medication Delivery Solutions, Medication Management Solutions, Pharmaceutical Systems, and Diabetes Care.

Fresenius Kabi

Fresenius Kabi, a wholly owned subsidiary of Fresenius SE & Co. KGaA, is a global

healthcare company specializing in products and services for dialysis, hospital care, and outpatient medical treatment. The company operates through four primary business segments: Medtech, Nutrition, Biopharmaceuticals, and Pharma Business. Through its Medtech segment, Fresenius Kabi offers a comprehensive range of infusion pumps and related accessories, supporting safe and efficient drug delivery in clinical settings.

Terumo Corporation

Terumo Corporation develops and manufactures a wide range of medical products and equipment, including pharmaceuticals, nutritional supplements, blood bags, disposable medical devices, cardiovascular systems, vascular grafts, peritoneal dialysis solutions, blood glucose monitoring systems, and digital thermometers. The company operates through three main business segments: Cardiac and Vascular, General Hospital Company, and Blood & Cell Technologies.

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