

Medical Device Outsourced Manufacturing Market by Device Type (IVD (Equipment, Consumable), Diabetes, Respiratory, Cardiovascular, Personal Care, Endoscopy, Dental, Ophthalmology, Devices) Class of Device, Services, Procedure - APAC forecast to 2026

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Abstracts

The Asia Pacific medical device outsourced manufacturing market is projected to reach USD 56.2 billion by 2026 from USD 29.3 billion in 2021 and is expected to grow at a CAGR of 13.9% during the forecast period. The Asia Pacific medical device outsourced manufacturing market is mainly driven by the overall growth of the medical devices market, mainly due to the rising disease prevalence, life expectancy, and geriatric population. Technological advancements have prompted end users to overhaul or update their manufacturing systems. As this is a costly process, they look to outsource contract manufacturing.

However, market growth is impeded by the growing consolidation in the medical devices market. To develop their own manufacturing capabilities and save costs, larger players are focusing on acquiring smaller players and CMOs themselves. This may affect the overall market growth to a certain extent.

“Cardiovascular segment is expected to witness fastest growth in the forecast period.”

Based on device type, the Asia Pacific medical device outsourced manufacturing market is broadly segmented into IVD devices, diagnostic imaging devices, cardiovascular devices, drug delivery devices, orthopedic devices, respiratory care devices, ophthalmology devices, surgical devices, diabetes care devices, dental devices, endoscopy devices, gynecology/urology devices, personal care devices, neurology devices, and other devices. Cardiovascular segment is expected to witness

fastest growth in the forecast period. With the prevalence of cardiovascular diseases on the rise, the demand for medical devices that can treat conditions of the heart and blood vessels will continue to grow. At the same time, the complexity of the devices will follow a similar trend. They will become smaller, incorporate more components made from various materials, require stringent tolerance analyses, and demand innovative packaging and sterilization solutions. Subsequently, not all OEMs possess innovative and sophisticated product manufacturing capabilities, thereby driving the demand for medical device outsourced manufacturing.

“Device development and manufacturing services segment accounted for the largest share of APAC medical device outsourced manufacturing market in 2020”

Based on service, the Asia Pacific medical device outsourced manufacturing market is segmented into device development and manufacturing services, quality management services, packaging and assembly services and other services. In 2020, the device development and manufacturing services segment dominated this market. The increasing adoption of contract manufacturing services in the medical device industry, growth in the medical devices market (especially in the single-use disposable medical devices market), and improving device development and manufacturing capabilities are the major factors responsible for the large share of this segment.

“Class III segment is expected to witness fastest growth in the forecast period.”

Based on the class of device, the APAC medical device outsourced manufacturing market is segmented into Class I, Class II, and Class III medical devices. The manufacturing of Class III devices requires sophisticated and advanced technologies owing to the risks these devices pose to patients if not utilized in the intended way. The primary difference is that in addition to the general controls of Class I devices and special controls of Class II devices, all Class III devices require premarket approval, including a comprehensive scientific review to ensure their safety and effectiveness. The high growth rate of this market segment is fueled by the increasing adoption of innovative technologies by medical device outsourced manufacturing companies to manufacture high-end Class III medical devices.

“Production segment accounted for the largest share of Asia Pacific medical device outsourced manufacturing market in 2020”

Based on process, the medical device outsourced manufacturing market is broadly segmented into production, prototyping, pilot production, design for manufacturing,

process evaluation, validation, project management, packaging, and assembly. In 2020, the production segment accounted for the largest share of the medical device outsourced manufacturing market. The large share of this segment can be attributed to the growing number of medical device companies outsourcing their production tasks to minimize manufacturing costs.

“China accounted for the largest share of the APAC medical device outsourced manufacturing market in 2020.”

Geographically, the Asia Pacific medical device outsourced manufacturing market has been segmented into China, Japan, India, South Korea, Malaysia & Singapore, Australia & New Zealand, and the Rest of Asia Pacific. In 2020, China accounted for the largest market share of the Asia Pacific medical device outsourced manufacturing market, followed by Japan. China's dominant share is mainly driven by the lower cost of raw material and labor than other Asia Pacific countries, increasing demand for medical devices due to the improving healthcare infrastructure, the adoption of technologically advanced products, and the less stringent regulatory scenario compared to most developed countries.

By Company: Tier 1: 40%, Tier 2: 35%, and Tier 3: 25%

By Designation: C-level Executives: 25%, Directors: 55%, and Others: 20%

By Country: India: 25%, China: 20%, Japan: 15%, Singapore: 10% and Rest of the World: 30%

Some of the key players in the medical device outsourced manufacturing market are Jabil Inc. (US), Nipro Corporation (Japan), Flex, Ltd. (Singapore), Sanmina Corporation (US), Nordson Corporation (US), Plexus Corp. (US), TE Connectivity (Switzerland), Kimball Electronics, Inc. (US), Benchmark Electronics Inc. (US), West Pharmaceutical Services Inc. (US), Aptar, Inc. (US), Carclo plc (UK), Nolato GW, Inc. (Sweden), Gerresheimer AG (Germany), Celestica Inc. (Canada), Integer Holdings Corporation (US), Nortech Systems, Inc. (US), Consort Medical plc (Sweden), Nemera Development SA (France), Tessy Plastics Corporation (US), Viant Medical (US), MeHow (China), Phillips-Medisize Corporation (US), Tekni-Plex (US), and Peter's Technology (Taiwan). The study includes an in-depth competitive analysis of these key players in the medical device outsourced manufacturing market, along with their company profiles, recent developments, and key market strategies.

Research Coverage:

The market study covers the Asia Pacific medical device outsourced manufacturing market across various segments. It aims at estimating the market size and the growth potential of this market across different segments by device type, services, class, process and country. The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants in this market and provide information regarding the closest approximations of the medical device outsourced manufacturing market and its segments. This report will help stakeholders understand the competitive landscape, gain insights to position their businesses better, and plan suitable go-to-market strategies. The report will also help stakeholders understand the pulse of the market and provide information on key market drivers, restraints, opportunities and challenges.

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