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Temperature Management Systems Market by Product (Warming Systems (Surface, Intravascular), Cooling Systems, Application (Perioperative, Acute, Newborn Care), Medical Speciality (Cardiology, Neurology, Pediatrics, Orthopedics) - Global Forecast to 2028

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Abstracts

The global temperature management systems market is projected to reach USD 3.9 Billion by 2028 from USD 3.0 Billion in 2023, at a CAGR of 4.9% during the forecast period. Growth of patient warming systems and patient cooling systems is mainly driven by the, the rising number of surgical procedures, and the increasing number of hypothermia cases. The increased use of surgical procedure is expected to drive the adoption patient warming systems and patient cooling systems by the more number of hospitals.

“The Perioperative Care segment accounted for the highest market share in the application segment market, by application, during the forecast period.”

Based on the application of the segment, the temperature management systems market is categorized as Perioperative care, acute care, newborn care, and other applications. Perioperative care is expected to have the highest growth in the market, which is attributed to the rising prevalence of various chronic diseases like cancer where temperature management systems are used to maintain hypothermia during the operative treatment and. Increasing growth opportunities in emerging economies will drive the Perioperative care.

“The North America segment accounted for the highest market share in temperature management systems market, by region, during the forecast period.”

Based on the region, the global temperature management systems market is categorized into North America, Europe, Asia Pacific, and Rest of the world. North America is expected to witness a high market share during the forecast period due to growth development and awareness of the use of patient warming and cooling systems order to maintain the temperature the patient while any operative or surgical procedure. For instance, In 2022, over 1.87 million surgical procedures were performed in the US. Hypothermia is a common condition observed in surgical procedures due to the usage of anesthesia. Mild hypothermia is extremely common during anesthesia and surgery. Mild, treatable cases of hypothermia are more common, especially among groups of people who are at risk. In the United States, between 700 and 1,500 people die every year from hypothermia. This necessitates the use of surface and intravascular warming devices; as a result, the increasing volume of surgical procedures is expected to impact the temperature management systems market in the North America region.

Breakdown of supply-side primary interviews by company type, designation, and region:

By Company Type: Tier 1 (30%), Tier 2 (44%), and Tier 3 (26%)

By Designation: C-level (30%), Director-level (33%), and Others (37%)

By Region: North America (40%), Europe (28%), Asia-Pacific (18%), RoW- (14%),

Prominent companies include 3M Company (US), GE Healthcare (US), Dragerwerk AG & Co. KGAA (Germany), Ecolab (US), Asahi-Kasei Corporation (Japan), Becton, Dickinson and Company (US), ICU Medical (US), Gentherm Incorporated (US), Inspiration Healthcare Group PLC (UK), Medtronic PLC (Ireland), Stryker Corporation (US), The Surgical Company (Netherlands), Adroit Medical Systems (US), Attune Medical (US), Augustine Surgical, Inc (US), Belmont Medical Technologies (US), Biegler GMBH (Austria), Encompass Group, llc (US), Enthermics, INC (US), Hirtz & Co. KG (Germany), Istanbul Medikal ltd. (Istanbul), Life Recovery Systems (US), Medcare Visions (Germany), TahatAksi (Belarus) and Beijing Eternal Medical Technology Co., Ltd (China).

Research Coverage

This research report categorizes the temperature management systems market which is segmented into product used for temperature management and the applications of

those products along with the medical speciality segment use in the hospital. The product used for the temperature management is divided into three types Patient Warming Systems i.e. Surface Warming Systems and Intravascular Warming Systems, Patient Cooling Systems i.e. Surface Cooling Systems and Intravascular Cooling Systems and Accessories and Patient warming/cooling systems. The Application segment the classised as the Perioperative Care, Acute Care, Newborn Care and Other applications. Medical specialty segment is classified as General Surgery, Cardiology, Neurology, Pediatrics, Thoracic Surgery, Orthopedic Surgery and Other Medical Specialities, and regional segment is divided as the North America, Europe, Asia Pacific and Rest of world. The scope of the report covers detailed information regarding the major factors like market dynamics such as drivers, restraints, challenges, and opportunities which is influencing the growth of the temperature management systems market. A detailed analysis of the key industry players has been also the companies new launches, developments, mergers and acquisitions associated with the temperature management systems market has been covered. Competitive analysis of upcoming startups in the temperature management systems market ecosystem is covered in this report.

Key Benefits of Buying the Report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall temperature management systems market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

> Analysis of key drivers (Increasing prevalence of chronic and infectious diseases, rising number of surgical procedures and Increasing number of hypothermia cases), restraints (High cost of intravascular temperature management systems, Lack of awareness regarding temperature management systems in developing countries and Lack of proper supply chain management) opportunities (Increasing growth opportunities in emerging markets, Growing number of contracts and agreements between market players and Developing healthcare infrastructure) and Challenges (Product recalls and Lack of skilled healthcare professionals) are influencing the growth of the temperature

management systems market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the temperature management systems market.

Market Development: Comprehensive information about lucrative markets – the report analyses the temperature management systems market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the temperature management systems market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players, among others, in the temperature management systems market strategies.

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Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats) might not be captured in case of unlisted companies.

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About

The healthcare expenditure of a country includes spending by both public and private sources on medical services and goods, public health and prevention programs, and administration. Increase in healthcare expenditure is a direct indicator of a country‘s growth in the healthcare market. In addition, it also reflects the improvements in diverse financing and organizational structures of the healthcare system in a particular country.

Increasing government expenditure is poised to support the development of hospitals and clinics, which in turn will increase the demand of temperature management devices in various countries accordingly. For instance, the U.S. spends $8,508 per person on healthcare; this figure is almost two-and-a-half times that of countries in the Organization for Economic Co-operation and Development (OECD), and 50% higher than the next-highest spending countries, namely, Norway and Switzerland. Owing to this, the adoption of temperature management systems is highest in the U.S. among the key developing economies (outside of the OECD countries). In 2011, the per capita spending on health in China and India was 13% and 4% of the OECD average, respectively. Mexico and Turkey were the lowest per capita spenders on health among the OECD countries, with levels of less than a third of the OECD average. These countries showcase low adoption of temperature management devices. Thus, the total healthcare expenditure of a nation indirectly impacts the overall demand for temperature management devices in that country.

Rising aging population results in an increasing demand for surgical procedures such as cardiovascular, central nervous system, and orthopedic surgeries, which in turn drives the demand for patient temperature management systems. The impact of the aging population was determined using multiple sources such as World Health Organization (WHO), the Agency for Healthcare Research and Quality, the Organization for Economic Co-operation and Development (OECD), and the UN Population Division.

To study the impact of the aging population on the temperature management market, we selected major countries from every region [North America, Europe, Asia-Pacific, and the Rest of the World (RoW)]. The extent of aging population in various countries directly impacts the adoption of patient temperature management products in these countries.

The rapidly increasing aging population has considerably fuelled the growth of the temperature management market. There were 880 million people worldwide aged 60

years and above in 2011 and this number is expected to reach 2 billion by 2050, representing 22% of the world's population (Source: UN Population Division). Moreover, the risk of diseases increases with age, which ultimately increases the demand for surgical procedures in patients with cardiovascular diseases, neurological disorders, and orthopedic-related ailments, among others.

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