

Europe Intravenous Solutions - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Europe Intravenous Solutions Market size is estimated at USD 3.98 billion in 2024, and is expected to reach USD 5.20 billion by 2029, growing at a CAGR of 5.45% during the forecast period (2024-2029).

Factors such as the increasing prevalence of chronic diseases, such as gastrointestinal disorders, neurological diseases, and cancer, as well as advancements and innovations in products for patient convenience, are expected to drive market growth during the forecast period. For instance, according to the data updated by the Spanish Network of Cancer Registries (REDECAN) in January 2023, approximately 279,260 new cases of cancer occurred in Spain by the end of 2023, out of which 42,721 were new cases of colorectal cancer, 31,282 were cases of lung cancer, and 21,694 were cases of urinary bladder cancer. Therefore, the high incidence of cancer is predicted to increase the demand for intravenous solutions and is expected to further contribute to the market's growth.

Additionally, the profound impact on the quality of life of patients afflicted with neurological disorders, alongside the escalating societal burden attributed to the aging demographic of the Western population. For instance, according to data published by University College London in October 2023, by 2040, England and Wales are projected to experience a significant increase in the prevalence of dementia, with 1.7 million individuals affected in England alone, exceeding previous estimates. NHS data released in November 2023 revealed a surge in dementia diagnoses, with 475,573 people identified in September 2023, representing a rise of over 52,000 from the previous year. This surge marked the highest dementia diagnosis rate in the past three years, highlighting an alarming trend. Thus, the increasing number of brain disorders is

increasing the demand for intravenous solutions in the United Kingdom, thereby contributing to the growth of the market studied.

Moreover, various initiatives taken by key players, such as product launches, investments, and partnerships to increase the footprint, are expected to boost the market's growth during the forecast period. For instance, in July 2023, Recce Pharmaceuticals Ltd reported positive results from a Phase I (R327-001) study of RECCE 327 (R327) as an intravenous (IV) infusion formulation in 80 healthy male subjects in Austria. When administered at doses much higher than the expected therapeutic window, R327 IV does not lead to safety or toxicity issues in healthy subjects.

Thus, the abovementioned factors, such as the high burden of chronic diseases and strategic initiatives, are expected to drive the market's growth during the forecast period. However, regulatory and quality requirements are expected to restrain the market's growth.

Europe Intravenous Solutions Market Trends

Total Parenteral Nutrition Segment is Expected to Witness Significant Growth During the Forecast Period

Total parenteral nutrition (TPN) delivers all indispensable nutrients (carbohydrates, proteins, fats, vitamins, and minerals) directly into the bloodstream through intravenous infusion. This method is utilized when a patient's gastrointestinal tract cannot adequately absorb nutrients or oral feeding is impossible. The key factor contributing to the growth of the TPN segment is the increasing prevalence of patients suffering from chronic illnesses or medical conditions that hinder their ability to consume food normally.

Patients with conditions like severe gastrointestinal disorders, certain cancers, or those recovering from significant surgeries often require TPN for nourishment and hydration. For instance, according to the Cancer Research United Kingdom data published in May 2023, the average annual number of new cancer cases in the United Kingdom was estimated to increase from approximately 420,000 during 2023-2025 to approximately 506,000 during 2038-2040, and the combined incidence rate of all cancers in the country was projected to rise by 2% from 2023-2025 to 2038-2040, reaching an average of 625 cases per 100,000 people per year during 2038-2040. Thus, the increasing incidence of chronic conditions such as cancer is driving the demand for parenteral

nutrition, as these patients often require TPN solutions when they are unable to receive adequate nutrition orally.

Moreover, various initiatives taken by key players, such as product launches, mergers, acquisitions, and partnerships to increase the footprint, are expected to boost the market's growth during the forecast period. For instance, in June 2022, Baxter International and Laboratoire Aguettant SAS collaborated on a global licensing and distribution agreement for trace elements and crucial micronutrients for parenteral nutrition therapy. This partnership enabled Baxter to expand its extensive parenteral nutrition product line, reaching over 90 countries, by incorporating essential trace elements.

Thus, the abovementioned factors, such as the growing burden of chronic diseases and strategic activities by the market players, are expected to drive the growth of the segment during the forecast period.

Germany is Expected to Hold a Significant Share in the Market During the Forecast Period

Germany is expected to contribute to the market's growth during the forecast period. The significant factors attributable to this growth are the rising burden of diseases, the rising geriatric population, and the increasing number of surgeries. For instance, according to the data published in the Journal of Health Monitoring in September 2023, in Germany, 1.7 million individuals were diagnosed with dementia in 2022, and it is projected that approximately 3 million people in Germany will be affected by dementia by 2070. The at-risk population includes an estimated 1.65 to 2 million individuals aged 65 or older who may develop dementia. Approximately 38% of dementia cases are attributed to modifiable risk factors. Thus, the high burden of chronic diseases such as dementia requires proper treatment and management with an IV solution, further contributing to the rising demand for TPN solutions.

Moreover, the aging population has led to a rise in the number of patients with chronic diseases and conditions that necessitate intravenous solutions. For instance, according to the Eurostat update in February 2023, more than one-fifth (21.1 %) of the EU population was 65 years and over. Half of the EU population was older than 44.4 years in 2022. The elderly are more prone to malnutrition and other health issues, thereby contributing to the growth of the intravenous solutions market.

Thus, the market studied is expected to grow in Germany during the forecast period due to the abovementioned factors, such as the growing aging population and the high burden of chronic diseases.

Europe Intravenous Solutions Industry Overview

The European intravenous solutions market is moderately competitive and consists of several major players. The market players adopted several strategies, such as the expansion of manufacturing and innovation in IV solutions, to stay competitive in the market. Some of the key players in the market are Baxter International Inc., B. Braun Melsungen AG, Fresenius Kabi AG, Grifols SA, and ICU Medical, Inc.

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