

Global Medical Suction Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Global Medical Suction Devices Market size is estimated at USD 1.43 billion in 2024, and is expected to reach USD 1.93 billion by 2029, growing at a CAGR of 5.96% during the forecast period (2024-2029).

Medical suction devices are primarily used for removing obstructions like saliva, mucus, blood, or secretions from the patient's body. Suction devices are commonly used in emergency and clinical settings, such as ambulances, hospitals, and home care settings, to help clear the airway of patients who cannot clear secretions on their own.

The growth of the market is attributed to the increasing prevalence of chronic respiratory disorders such as Chronic Obstructive Pulmonary Disease (COPD), acute lower respiratory tract infections, and asthma, as well as the increasing number of surgical procedures where suction devices are used.

Medical suction devices are used in cancer for surgical interventions and also during chemotherapy and radiation for the management of blood loss and removal of fluids to provide comfort and support overall treatment efficacy. According to the Globocan 2024 updated statistics, the incidence of cancer across the world was estimated at 19.97 million in 2022, and this number is expected to reach 30.97 million by 2045. Such a high rise in the incidence of cancer cases will create the need for medical suction devices, driving the growth of the market.

The increasing number of surgical procedures in different countries across the world is propelling the growth of the market. For instance, according to the Australian Institute of Health and Welfare's June 2023 update, 735,500 patients in Australia underwent

elective surgery in public hospitals in 2022-2023, an increase of about 18% compared to 622,988 in 2021-2022. Such an increase in the number of elective surgeries in the country also contributes to the growth of the market. Moreover, the increasing number of cardiac procedures is raising the demand for medical suction devices, driving the growth of the market. According to the article published in the Journal of Thoracic and Cardiovascular Surgeons in May 2023, 162,167 heart procedures were performed in 2022 compared to 161,261 procedures in 2021 in Germany. The increasing number of surgical procedures drives the growth of the market.

The growing need for compact and portable medical suction devices is projected to boost the market's growth in the near future. Several research studies have indicated that portable suction devices offer effective performance, ease of use, and portability, which can be utilized in challenging medical facilities. For instance, the article published in the Prehospital and Disaster Medicine Journal By Cambridge University in March 2022 highlighted the crucial features of a portable airway suction device, including its portability, robust suction, and ease of use for prehospital combat care. It also stated that the mobile battery-operated devices had increased suction capabilities and were easier to use. Such studies highlighting the benefits of the usage of portable and compact medical suction devices in different settings may contribute to a rise in the adoption of such devices, thereby boosting the growth of the medical suction devices market.

The launch of new products by the market players is expected to boost the growth of the market over the forecast period. For instance, in January 2022, Hercuvan Lab Systems launched a new vacuum aspirator series with the TT-VA-8 model and TT-VA-35 model for rapid separation of liquids and solids as well as continuous aspiration of solutions and buffers with an abundance of great features. TT-VA-35 model is an AC-powered vacuum aspirator. Such launches are increasing the adoption of such devices among doctors, which is expected to propel the growth of the market during the forecast period.

Hence, factors such as the rising prevalence of chronic diseases, the increasing number of surgical procedures, and the growing need for compact and portable medical suction devices are expected to boost the growth of the market. However, the limited reimbursement for suction devices is expected to impede market growth.

Medical Suction Devices Market Trends

The Surgical Applications Segment is Expected to Witness Significant Growth Over the Forecast Period

Medical suction pumps are used during and after surgery to remove surgical fluids, gases, tissue (including bones), and bodily fluids. They are used in operating theaters, delivery suites, ENT, and emergency departments. Smaller specialized suction pumps are used in dental departments.

Factors such as the growing burden of respiratory and other chronic diseases and the increasing burden of surgical procedures are expected to boost the growth of the segment. According to the Istituto Nazionale di Statistica's July 2023 update, there were 223,475 injuries in road accidents in Italy in 2022, an increase of 9.2% compared to the previous year. The high number of injuries in different countries increases the need for suction devices and boosts the procurement of the same.

According to estimates from the Global Cancer Observatory updated in February 2024, around 606 new cancer cases were identified in Germany in 2022; the number is expected to reach 656 thousand by 2030. Therefore, the high incidence of cancer is expected to increase surgical procedures in the country, along with the adoption of medical suction devices required during the procedures.

The data updated by Cedars-Sinai in January 2022 showed that coronary artery bypass graft surgery (CABG), also known as coronary artery bypass or bypass surgery, was the most common heart surgery. Each year, more than 300,000 people in the United States have successful bypass surgeries. Such a high number of surgeries increases the use of suction devices, boosting segment growth.

The approval of products for regulatory authorities is also contributing to the growth of the segment. For instance, in January 2022, Smith+Nephew received approval for new indication for its PICO 7 and PICO 14 Single Use Negative Pressure Wound Therapy (sNPWT) Systems. The systems were cleared by the US Food and Drug Administration to be used on closed surgical incisions to reduce the incidence of superficial and deep incisional surgical site infections (SSIs) for high-risk patients in Class I and Class II wounds, post-operative seroma and dehiscence. The systems include suction pumps that may promote wound healing via the removal of low to moderate levels of exudate and infectious materials.

Thus, the growing usage of these devices for various functionalities during surgeries, along with the increasing number of surgeries, is expected to boost segmental growth.

North America is Expected to Hold a Significant Share in the Medical Suction Devices Market During the Forecast Period

North America is projected to hold a significant share of the medical suction devices market owing to factors such as the increasing number of chronic respiratory diseases (such as chronic obstructive pulmonary disorder (COPD) and asthma) and the development of new and innovative devices.

Respiratory diseases such as COPD and asthma are some of the diseases that affect the quality of life for most Americans. COPD and asthma cause an increase in airway secretions that may obstruct the airway. Thus, clearing the airway with an aspirator or suction machine is required, ultimately boosting the demand for medical suction devices in the country. According to the January 2023 update by the American College of Allergy, Asthma and Immunology (ACAAI), the annual hospitalization related to asthma was 439,000, and asthma accounted for nearly 1.3 million emergency room visits annually in the United States. The high prevalence of the diseases is anticipated to increase the demand for medical suctioning devices for patient survival and a better quality of life, driving the market's growth in the country.

As per the January 2023 update by the Lung Canada organization, the rate of prevalence and incidence of asthma was among the highest in Canada, and about 2.7 million Canadians were diagnosed with asthma every year. Also, as per the source above, asthma was the third crucial factor related to school absenteeism, coupled with hospitalization for children. This burden of respiratory diseases is anticipated to create demand for medical suctioning devices and fuel the growth of the market in North America during the forecast period.

Innovative product launches and approvals in the North American market are anticipated to fuel the market growth over the forecast period. For instance, in April 2023, Defibtech introduced an advanced automated chest compression device, the ARM XR, which healthcare professionals can use to treat patients with cardiac arrest. This device features a suction cup piston design, which develops compressions and chest wall expansion and has an appropriate battery life that can be operated for longer hours to maintain compressions. Thus, such developments in the country are expected to fuel market growth.

The rise in investments in hospital infrastructure in Mexico is expected to create numerous opportunities for various medical devices in healthcare settings. For instance, in April 2022, the Jalisco government (Mexico) planned to invest more than USD 301.5 million in healthcare infrastructure over the next three years to build new hospitals and healthcare centers and upgrade existing ones. In addition, the “Mexican Social Security Institute (IMSS)” shared plans to invest USD 677.2 million to build 111 new hospitals by 2024 in Mexico. Thus, these investments are anticipated to create new opportunities for medical devices to be available in healthcare settings and, hence, are expected to drive the market’s growth in the region.

Therefore, owing to the aforementioned factors, such as the high prevalence of diseases, new product approvals, and the rise in investments in hospital infrastructure, the market is expected to grow in North America over the forecast period.

Global Medical Suction Devices Industry Overview

The medical suction device market is moderately competitive, with the presence of many local players. As a result, players focus on cost reduction and innovation to ensure sustainability. The majority of medical suction devices are produced by global market leaders. Market leaders with more funds for research and a better distribution system have established their positions in the market. Some of the key market players are Laerdal Medical, Labconco Corporation, Asahi Kasei Corporation (Zoll Medical Corporation), Precision Medical Inc., Medela AG, Amsino International Inc., Integra Biosciences AG, Olympus Corporation, MG Electric Ltd, and Allied Healthcare Products.

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