

# **Autotransfusion Device Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type**

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## **Abstracts**

### **Autotransfusion Devices Market Summary**

#### **Introduction**

Autotransfusion devices, including intraoperative, post-operative, dual-mode systems, and consumables, are vital for high-blood-loss surgeries like cardiac (17.9 million CVD deaths) and orthopedic procedures (3.2 million U.S. joint replacements). Driven by blood shortages (10% U.S. donation decline) and chronic diseases, these devices reduce reliance on donor blood. Innovations in automation, filtration, and portable designs enhance safety and efficiency. Aging populations (23% global by 2030) boost demand. The global market is projected to reach between USD 280 million and USD 500 million in 2025, with a CAGR of 4.6% to 8.4% through 2030.

#### **Regional Analysis**

**North America:** The U.S. leads with high surgical volumes, while Canada focuses on cardiac care.

**Europe:** Germany, France, and the UK drive demand due to CVD prevalence.

**Asia Pacific:** China sees growth from orthopedic surgeries, while Japan emphasizes infection control.

**Rest of the World:** Brazil expands surgical infrastructure, and India boosts cardiac care.

## Application Analysis

Hospitals: Expected growth of 4.7%-8.5%, driven by complex surgeries. Trends focus on automation.

Ambulatory Surgical Centers: Projected growth of 4.6%-8.4%, linked to outpatient procedures. Developments emphasize portability.

Cardiac Research Centers: Anticipated growth of 4.5%-8.3%, suited for innovation. Advances prioritize precision.

## Type Analysis

Intraoperative Autotransfusion Systems: Expected growth of 4.7%-8.5%, driven by cardiac surgeries. Trends highlight automation.

Post-operative Autotransfusion Systems: Projected growth of 4.6%-8.4%, key for orthopedics. Advances focus on filtration.

Dual-mode Autotransfusion Systems: Anticipated growth of 4.8%-8.6%, suited for versatility. Innovations prioritize integration.

Consumables & Accessories: Expected growth of 4.5%-8.3%, driven by recurring use. Trends emphasize safety.

## Key Market Players

Leading companies include Haemonetics Corporation, specializing in blood management solutions; Medtronic, offering advanced intraoperative systems; Fresenius, focusing on continuous flow technologies; LivaNova, known for high-efficiency autotransfusion systems; BD, providing consumables and accessories; Teleflex Incorporated, emphasizing surgical safety; Braile Biomedica, targeting Latin American markets; Atrium Orthopedic Surgeries Corporation, focusing on orthopedic applications; Beijing ZKSK Technology, innovating in cost-effective devices; and Redax, specializing in trauma surgery solutions.

## Porter's Five Forces Analysis

? Threat of New Entrants: Low, due to high R&D and regulatory barriers.

? Threat of Substitutes: Moderate, as donor blood competes, but autotransfusion offers safety.

? Bargaining Power of Buyers: Moderate, with hospitals seeking reliable, cost-effective systems, though clinical needs limit options.

? Bargaining Power of Suppliers: Moderate, with specialized component providers holding influence.

? Competitive Rivalry: High, with competition on automation, safety, and cost.

## Market Opportunities and Challenges

### Opportunities:

? Blood shortages (1 billion units globally) and chronic diseases drive demand.

? Automation and dual-mode systems boost adoption, while Asia's surgical growth enhances usage.

### Challenges:

? High costs limit access in low-income regions.

? Regulatory delays slow innovation.

? Skilled technician shortages restrict expansion.

## Market News

? In June 2023, idsMED Indonesia and LivaNova launched the ATS XTRA system.

? In September 2022, i-SEP received CE-marking for its Same autotransfusion technology.

? In June 2022, Haemonetics launched a manufacturing center in Pennsylvania.

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