

# **Infusion Sets and Accessories Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type**

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## **Abstracts**

### **Infusion Sets and Accessories Market Summary**

#### **Introduction**

Infusion Sets and Accessories encompass devices like infusion sets, pumps, IV cannulas, and needleless connectors used to deliver fluids, medications, or nutrients intravenously. These products are vital for managing chronic conditions requiring long-term therapy, such as diabetes, cancer, and autoimmune diseases. The market is characterized by its essential role in healthcare delivery, driven by rising chronic disease prevalence, advancements in wearable pumps, and patient safety innovations. Trends include smart infusion systems with connectivity, biocompatible materials, and expanded access in home care settings.

#### **Market Size and Growth Forecast**

The global Infusion Sets and Accessories market was valued at USD 0.9 billion to USD 1.7 billion in 2024, with an estimated CAGR of 5.0% to 7.0% from 2025 to 2030, fueled by chronic disease management needs.

#### **Regional Analysis**

North America grows at 4.5% to 6.5%, with the United States leading due to advanced healthcare; trends focus on smart pumps and home care.

Europe achieves a growth rate of 5.0% to 7.0%, driven by Germany and France; trends emphasize patient safety innovations.

Asia Pacific sees a growth rate of 5.5% to 7.5%, led by China and India; trends highlight affordable devices and hospital growth.

The Rest of the World records a growth rate of 4.5% to 6.5%, with Brazil emerging; trends center on chronic disease care investments.

### Application Analysis

Hospital expands at 5.0% to 7.0%; it relies on infusion sets for acute care, with trends favoring automated systems.

Clinic grows at 4.5% to 6.5%; it uses infusion sets for outpatient therapy, with trends emphasizing portability.

Others rise at 4.5% to 6.5%; this includes home care, with trends exploring patient self-administration.

### Type Analysis

Infusion Sets expand at 5.0% to 7.0%; they ensure reliable delivery, with trends focusing on comfort and safety.

Infusion Pumps grow at 5.5% to 7.5%; they offer precise dosing, with trends emphasizing connectivity and wearability.

IV Cannulas rise at 4.5% to 6.5%; they provide vascular access, with trends favoring biocompatible materials.

Needleless Connectors grow at 5.0% to 7.0%; they enhance safety, with trends focusing on infection prevention.

Others rise at 4.5% to 6.5%; this includes tubing, with trends exploring durability and flexibility.

### Key Market Players

B. Braun, based in Melsungen, Germany, designs infusion sets with safety features, serving global hospitals.

BD, headquartered in Franklin Lakes, New Jersey, USA, offers infusion accessories for precise therapy delivery.

Medtronic, from Dublin, Ireland, crafts smart infusion pumps for diabetes and chronic care.

Terumo Corporation, based in Tokyo, Japan, provides infusion sets with patient-centric designs.

Nipro Corporation, headquartered in Osaka, Japan, offers cost-effective infusion accessories for Asia.

ICU Medical, from San Clemente, California, USA, specializes in infusion safety solutions for hospitals.

Fresenius Kabi, based in Bad Homburg, Germany, supplies infusion sets for critical care settings.

Moog Medical, headquartered in Salt Lake City, Utah, USA, designs infusion pumps for specialized therapies.

Baxter International, from Deerfield, Illinois, USA, offers infusion systems for acute and home care.

Roche Diagnostics, based in Basel, Switzerland, integrates infusion sets into diabetes management.

Insulet Corporation, headquartered in Acton, Massachusetts, USA, crafts wearable infusion pumps.

Ypsomed Holding AG, from Burgdorf, Switzerland, focuses on infusion devices for self-administration.

Kangaroo Medical, based in Shanghai, China, provides affordable infusion sets for regional markets.

Zyno Medical, headquartered in Natick, Massachusetts, USA, offers infusion pumps for outpatient care.

Vygon Group, from Ecouen, France, designs infusion accessories with safety-focused innovations.

Mindray Medical International Limited, based in Shenzhen, China, supplies infusion systems for hospitals.

Animas Corporation, headquartered in West Chester, Pennsylvania, USA, focuses on diabetes infusion devices.

SOOIL Development, from Seoul, South Korea, crafts infusion pumps for insulin delivery.

Cardinal Health, based in Dublin, Ohio, USA, provides infusion accessories with broad distribution.

Micrel Medical Devices, headquartered in Athens, Greece, designs compact infusion pumps.

Merit Medical, from South Jordan, Utah, USA, offers infusion components for vascular access.

Zhejiang Fert Medical Device Co., based in Shaoxing, China, supplies cost-effective infusion sets.

PW Medtech Group, from Beijing, China, focuses on infusion accessories for regional healthcare.

Haiou Medical, headquartered in Weihai, China, provides infusion sets for cost-sensitive markets.

Nanjing Cellgene, based in Nanjing, China, crafts infusion devices for clinical applications.

Sichuan Prius, from Chengdu, China, offers infusion sets for domestic hospitals.

Shandong Weigao Group, headquartered in Weihai, China, supplies infusion accessories for Asia.

Shinva Ande, based in Zibo, China, provides infusion sets for regional healthcare needs.

### Porter's Five Forces Analysis

The threat of new entrants is moderate; regulatory barriers and R&D costs deter entry, but demand attracts innovators.

The threat of substitutes is low; oral therapies cannot replace intravenous delivery for many conditions.

Buyer power is moderate; hospitals demand reliability, but large networks influence pricing.

Supplier power is moderate; specialized materials create dependency, with suppliers holding some leverage.

Competitive rivalry is high; firms differentiate through connectivity, safety, and affordability.

### Market Opportunities and Challenges

#### Opportunities

Rising chronic disease prevalence drives infusion therapy demand.

Smart infusion systems enhance patient monitoring and outcomes.

Home care trends expand market reach in developed regions.

#### Challenges

High costs of advanced pumps limit adoption in emerging markets.

Regulatory compliance increases production expenses.

Infection risks push for costly safety innovations.

### Merger and Acquisition News

In 2024, Boston Scientific announced an agreement to acquire Intera Oncology Inc., enhancing its infusion technology portfolio. This acquisition strengthens infusion set offerings by integrating advanced delivery systems, improving precision and patient outcomes.

On May 28, 2024, Nordson Corporation announced an agreement to acquire Atrion Corporation, a leader in medical infusion technologies. This acquisition bolsters infusion pump and accessory innovation, driving market growth through enhanced manufacturing capabilities.

### Growth Trend Analysis

The Infusion Sets and Accessories market is growing steadily, driven by chronic disease prevalence. Over 3.2 million Americans receive infusion therapy annually, with spending exceeding USD 110 billion, growing at 5% to 7% yearly due to complex therapies and chronic conditions. This aligns with a projected CAGR of 5.0% to 7.0% through 2030, supported by technological advancements and healthcare infrastructure expansion.

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