

Non-Invasive Vein Visualization Device Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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Abstracts

Non-Invasive Vein Visualization Device Market Summary

Introduction

Non-invasive vein visualization devices use advanced imaging technologies, such as near-infrared or laser systems, to locate veins beneath the skin without invasive procedures, improving venipuncture success rates. The industry is characterized by its focus on patient comfort, procedural efficiency, and safety, reducing complications like failed IV insertions. These devices are critical in emergency care, pediatrics, and chronic disease management, driven by rising healthcare demands, an aging population, and technological advancements in imaging. Their portability and ease of use enhance clinical workflows, making them essential in modern medical practice.

Market Size and Growth Forecast

The global non-invasive vein visualization device market was valued at USD 650 million to USD 930 million in 2024, with a projected CAGR of 7.0% to 9.0% from 2025 to 2030. This growth reflects increasing adoption across healthcare settings and ongoing innovations.

Regional Analysis

North America grows at 6-8%, led by the United States' high healthcare adoption, with

Canada advancing in pediatric care; trends focus on portable imaging solutions.

Europe experiences a growth rate of 7-9%, with Germany and the UK driving demand through advanced medical systems, while France emphasizes precision; trends favor integration with digital health.

Asia Pacific sees a growth rate of 8-10%, with China and Japan expanding healthcare access, while India targets affordability; trends highlight scalable, low-cost devices.

The Rest of the World grows at 6-8%, with Brazil and Australia improving emergency care; trends prioritize user-friendly technologies.

Application Analysis

Emergency Department grows at 8-10%, driven by urgent venipuncture needs; trends focus on rapid, accurate vein detection.

Pediatrics grows at 7-9%, fueled by delicate vein access requirements; trends emphasize gentle, non-invasive solutions.

Blood Center and Dialysis Unit grows at 6-8%, supporting chronic care; trends target efficiency in repeated procedures.

Intensive Care Unit grows at 7-9%, aiding critical patients; trends focus on real-time imaging integration.

Others, such as surgery, grow at 5-7%, with niche applications; trends explore broader procedural uses.

Product Type Analysis

Near Infrared Type grows at 7-9%, offering reliable vein mapping; trends favor cost-effective, portable designs.

Laser Type grows at 8-10%, providing high precision; trends emphasize advanced imaging capabilities.

Others, such as ultrasound, grow at 6-8%, with specialized uses; trends target versatility and integration.

Key Market Players

AccuVein, Inc., based in Cold Spring Harbor, New York, USA, leads in vein visualization, offering portable devices that enhance venipuncture accuracy in diverse clinical settings.

B. Braun, from Melsungen, Germany, integrates vein visualization into its medical solutions, focusing on safety and efficiency for European healthcare providers.

BD, headquartered in Franklin Lakes, New Jersey, USA, provides vein visualization tools, enhancing procedural success in hospitals and clinics globally.

Christie Medical, based in Lake Mary, Florida, USA, specializes in near-infrared imaging, delivering devices that improve vein access in emergency and pediatric care.

Koninklijke Philips, from Amsterdam, Netherlands, offers advanced vein visualization systems, integrating them into its healthcare technology portfolio for clinical precision.

Near Infrared Imaging, headquartered in Wrentham, Massachusetts, USA, focuses on imaging innovation, producing devices for accurate vein detection in medical settings.

Teleflex Incorporated, based in Wayne, Pennsylvania, USA, enhances vascular access with vein visualization tools, supporting critical care and procedural efficiency.

Venoscope, from Lafayette, Louisiana, USA, provides practical vein visualization solutions, catering to North American markets with straightforward designs.

VINO Optics, headquartered in Boulder, Colorado, USA, innovates in optical imaging, offering vein visualization devices for specialized medical applications.

Porter's Five Forces Analysis

The threat of new entrants is moderate, with high R&D costs, though niche markets ease entry.

The threat of substitutes is low to moderate, as traditional methods compete, but imaging precision sustains demand.

Buyer power is moderate, with hospitals seeking cost-effective solutions, though clinical needs limit options.

Supplier power is moderate, with imaging components controlled by key firms, balanced by global supply chains.

Competitive rivalry is high, with firms differentiating through imaging quality, portability, and integration, driving innovation.

Market Opportunities and Challenges

Opportunities

Rising chronic disease prevalence increases venipuncture demand.

Technological advancements enhance device accuracy.

Aging population expands critical care needs.

Challenges

High device costs limit adoption in low-resource areas.

Training requirements hinder widespread use.

Regulatory delays impact market entry.

Merger and Acquisition News

Stryker to Acquire Inari Medical for \$4.9 Billion (Date: November 20, 2024): This acquisition enhances Stryker's vascular portfolio, potentially integrating Inari's technologies into vein visualization devices, improving accuracy and expanding market reach in critical care applications.

Growth Trend Analysis

GE HealthCare and MediView's OmnifyXR launch highlights augmented reality's role in enhancing vein visualization. CDC data showing 40.3% adult obesity and 9.4% severe obesity from 2021-2023 underscores rising chronic conditions, increasing venipuncture needs and driving market growth at 7-9% CAGR.

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