

Automated Compounding Device (Oncology) Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Technology (Gravimetric Compounding System, Volumetric Compounding System), By End User (Hospitals, Chemotherapy Centers, Others), By Region, By Competition

<https://marketpublishers.com/r/AC2AC710387CEN.html>

Date: November 2023

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: AC2AC710387CEN

Abstracts

Global Automated Compounding Device (Oncology) Market has valued at USD 300.19 Million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 7.56% through 2028. The Global Automated Compounding Device (Oncology) Market is experiencing robust growth, primarily driven by technological advancements and increasing demand for precise and personalized medication in oncology. The integration of automation in compounding processes enhances accuracy, reduces errors, and ensures the safety of chemotherapy preparations, thereby boosting the market. Rising cancer incidence rates worldwide contribute to the escalating demand for oncology medications, further propelling the adoption of automated compounding devices. Additionally, the emphasis on stringent regulatory compliance and adherence to quality standards in pharmaceutical compounding drives market growth. The need for streamlined compounding workflows, coupled with the benefits of time and resource efficiency, accelerates the acceptance of automated compounding devices in oncology settings. Overall, these factors collectively fuel the expansion of the Global Automated Compounding Device (Oncology) Market.

Key Market Drivers

Rising Incidence of Cancer

The escalating incidence of cancer globally is poised to catalyze substantial growth in the Global Automated Compounding Device (Oncology) Market. As cancer cases surge, there is an inherent demand for precise and efficient medication compounding in oncology treatments. Automated compounding devices offer a streamlined and error-reducing solution, ensuring the accurate preparation of complex oncology drugs. These devices not only enhance patient safety by minimizing dosage errors but also contribute to operational efficiency in healthcare facilities. The need for personalized and timely cancer therapies further underscores the significance of automated compounding devices, as they enable healthcare providers to tailor treatments to individual patient requirements. Moreover, the increasing prevalence of stringent regulations and standards for medication preparation in oncology settings amplifies the adoption of automated compounding devices, as they ensure compliance and adherence to established protocols. Consequently, the Global Automated Compounding Device (Oncology) Market is set to experience robust growth, driven by the imperative for precise and reliable drug compounding in the face of rising cancer cases worldwide.

Demand for Precision Medicine

The burgeoning demand for precision medicine is poised to propel significant growth in the Global Automated Compounding Device (Oncology) Market. Precision medicine, which tailors medical treatments to the specific characteristics of each patient, requires a meticulous and individualized approach to drug compounding. Automated compounding devices play a pivotal role in ensuring the accuracy and reproducibility of intricate drug formulations crucial for precision medicine applications in oncology. As the adoption of precision medicine continues to rise, driven by advancements in genomics and targeted therapies, there is an escalating need for sophisticated compounding solutions that can handle the intricacies of personalized treatments. Automated compounding devices not only mitigate the risk of human error but also enhance the efficiency of preparing patient-specific medications, aligning seamlessly with the core tenets of precision medicine. Furthermore, regulatory agencies are emphasizing the importance of precise medication preparation in the context of precision medicine, further fueling the demand for automated compounding technologies. In essence, the intersection of precision medicine and automated compounding devices is anticipated to drive substantial growth in the oncology market, meeting the evolving requirements of personalized cancer care.

Patient Safety and Medication Accuracy

The growth of the Global Automated Compounding Device (Oncology) Market is intricately tied to the imperatives of patient safety and medication accuracy. In the realm of oncology, where precise drug formulations are paramount, automated compounding devices emerge as pivotal instruments in safeguarding patient well-being. These devices significantly reduce the risk of human errors associated with manual compounding, ensuring the accuracy and consistency of complex oncology medications. Patient safety is a cornerstone in healthcare, and any lapses in medication preparation can have profound consequences. Automated compounding devices not only enhance the reliability of drug compounding but also contribute to mitigating adverse events, thereby bolstering overall patient safety. The stringent regulatory landscape governing medication practices further accentuates the demand for automated solutions, as they align with industry standards and guidelines. As healthcare providers increasingly prioritize patient safety and seek to minimize the margin of error in oncology treatments, the adoption of automated compounding devices becomes a strategic imperative. This synergy between patient safety, medication accuracy, and automated compounding technologies positions the market for robust growth, addressing critical needs in the delivery of precise and safe oncological care.

Key Market Challenges

Initial Capital Investment

The growth of the Global Automated Compounding Device (Oncology) Market may encounter hindrances due to the substantial initial capital investment required for adopting automated compounding technologies. The deployment of sophisticated and technologically advanced compounding devices involves a significant upfront financial commitment, which can be a deterrent for healthcare facilities, particularly smaller ones with constrained budgets. The initial capital investment encompasses the costs associated with acquiring the automated compounding devices, implementing necessary infrastructure changes, and providing comprehensive training for healthcare staff. This financial burden may pose a challenge for some healthcare institutions, limiting their ability to embrace these innovative technologies, despite their potential long-term benefits. Moreover, uncertainties surrounding return on investment and the time required to recoup initial expenditures can further impede adoption. Healthcare organizations may exhibit reluctance to commit substantial resources upfront, especially if they perceive potential financial risks or if they prioritize short-term financial goals over long-term efficiency gains. To address these challenges and facilitate market growth, stakeholders in the automated compounding device industry may need to explore

flexible financing options, incentivize adoption through cost-effectiveness studies, and provide comprehensive support to mitigate the perceived financial barriers hindering the widespread integration of these technologies in oncology settings.

Training and Workforce Education

The growth of the Global Automated Compounding Device (Oncology) Market may face impediments due to challenges associated with training and workforce education. The successful implementation of automated compounding devices requires healthcare professionals to acquire specialized skills and knowledge in operating and maintaining these sophisticated technologies. Inadequate training programs and a shortage of skilled personnel can hinder the seamless integration of automated compounding devices into oncology settings. Healthcare institutions need to invest time and resources in comprehensive training programs to ensure that their workforce is proficient in utilizing these advanced technologies. The learning curve associated with automated compounding devices, coupled with potential resistance to change, may slow down the adoption process. Moreover, the dynamic nature of healthcare technology requires continuous education and updates for healthcare professionals to stay abreast of the latest advancements. A lack of ongoing workforce education initiatives may result in suboptimal utilization of automated compounding devices, impacting their overall effectiveness in improving patient outcomes and safety. To mitigate these challenges, industry stakeholders must prioritize robust training programs, offer continuous education opportunities, and collaborate with educational institutions to bridge the knowledge gap. Addressing the workforce's educational needs is crucial for unlocking the full potential of automated compounding devices in oncology and fostering their widespread acceptance in the market.

Key Market Trends

Adoption of Robotics and Artificial Intelligence (AI)

The growth of the Global Automated Compounding Device (Oncology) Market is poised to be catalyzed by the increasing adoption of Robotics and Artificial Intelligence (AI). The integration of robotics and AI technologies into compounding devices in oncology offers a paradigm shift, enhancing precision, efficiency, and safety in medication preparation. Robotic systems equipped with AI algorithms can precisely measure and mix complex drug formulations, minimizing errors associated with manual compounding. AI-driven algorithms also contribute to adaptive learning, enabling the system to continuously improve accuracy based on real-time data and evolving medical

knowledge.

Furthermore, the use of robotics in handling hazardous substances in oncology medications enhances safety for healthcare professionals, reducing exposure risks. The automation of repetitive tasks through robotics not only accelerates the compounding process but also allows healthcare personnel to focus on more complex aspects of patient care. As the healthcare industry increasingly embraces digital transformation, the incorporation of robotics and AI in automated compounding devices becomes a strategic imperative. The synergy between advanced technologies and medication compounding in oncology positions the market for significant growth, offering a forward-looking solution that aligns with the industry's pursuit of precision and efficiency.

Increased Connectivity and Interoperability

The growth of the Global Automated Compounding Device (Oncology) Market is poised to accelerate with the advent of increased connectivity and interoperability. Enhanced connectivity allows seamless integration of automated compounding devices into broader healthcare ecosystems, facilitating data exchange and interoperability with other critical systems such as Electronic Health Records (EHRs) and pharmacy management systems. This integration streamlines communication and data sharing, promoting a more cohesive and efficient workflow within healthcare facilities. The ability of automated compounding devices to interact seamlessly with other technologies fosters a synchronized approach to patient care in oncology settings, reducing the likelihood of errors and improving overall operational efficiency.

Moreover, increased connectivity enables real-time monitoring and remote management of automated compounding devices, enhancing responsiveness to changing patient needs and ensuring timely adjustments in drug formulations. This connectivity-driven synergy aligns with the industry's broader push towards digitalization and data-driven healthcare solutions. As healthcare systems strive for comprehensive, interconnected solutions, the compatibility and interoperability of automated compounding devices become key factors driving market growth. The seamless integration of these devices into the evolving healthcare landscape not only enhances patient safety but also positions them as integral components in the pursuit of more efficient and interconnected healthcare delivery.

Segmental Insights

Technology Insights

Based on the Technology, the Volumetric Compounding System segment is anticipated to witness substantial market growth throughout the forecast period. The Global Automated Compounding Device (Oncology) Market is poised for significant growth, propelled by the adoption of Volumetric Compounding Systems. This advanced technology represents a critical evolution in drug compounding, particularly in the realm of oncology, where precision is paramount. Volumetric Compounding Systems offer a highly accurate and efficient method for preparing complex oncology medications, ensuring precise volume measurements and minimizing the margin of error associated with manual compounding. The inherent capabilities of these systems to handle a diverse range of drug formulations with meticulous precision contribute to improved patient safety and treatment outcomes. Their versatility in accommodating varying medication volumes aligns seamlessly with the demand for personalized and patient-specific oncology therapies.

Furthermore, Volumetric Compounding Systems often feature automation and integration capabilities, streamlining workflows in healthcare settings. The automation of compounding processes not only enhances efficiency but also allows healthcare professionals to allocate more time to patient care and clinical decision-making. As the healthcare industry continues to prioritize accuracy, safety, and operational efficiency, the adoption of Volumetric Compounding Systems emerges as a strategic imperative, driving the growth of the Global Automated Compounding Device (Oncology) Market and revolutionizing the landscape of medication preparation in oncology.

End User Insights

Based on the End User segment, the Hospitals segments has been the dominant force in the market. The growth of the Global Automated Compounding Device (Oncology) Market is poised to be significantly driven by the hospitals segment. Hospitals, as pivotal components of the healthcare ecosystem, are increasingly recognizing the critical role of automated compounding devices in elevating patient care standards, particularly in the field of oncology. The inherent precision and efficiency offered by these devices align with the stringent medication requirements in cancer treatments, fostering a paradigm shift in medication preparation. In hospital settings, where patient safety and workflow optimization are paramount, automated compounding devices contribute to reducing the risk of errors associated with manual compounding. The demand for streamlined and error-free medication preparation processes, especially for complex oncology therapies, positions automated compounding devices as indispensable tools within hospital pharmacies and oncology departments. Furthermore,

the ability of these devices to handle the high volume and diverse formulations required for various oncology treatments enhances operational efficiency in hospitals. As healthcare providers strive for enhanced treatment outcomes and regulatory compliance, the adoption of automated compounding devices within hospitals is expected to be a key driver in the sustained growth of the Global Automated Compounding Device (Oncology) Market.

Regional Insights

North America, specifically the Automated Compounding Device (Oncology) Market, dominated the market in 2022, primarily due to North America is poised to be a major driver of growth in the Global Automated Compounding Device (Oncology) Market. The region exhibits a robust healthcare infrastructure, characterized by technologically advanced healthcare facilities and a strong emphasis on patient safety and treatment precision. As the prevalence of cancer continues to rise, the demand for efficient and accurate medication compounding in oncology becomes increasingly critical, positioning automated compounding devices as essential tools in the region's healthcare landscape. Furthermore, North America has a well-established regulatory framework that emphasizes the importance of medication safety and adherence to standards. Automated compounding devices, designed to meet stringent regulatory requirements, are well-suited to address these standards, further fostering their adoption in the region. The region's proactive approach toward the integration of cutting-edge healthcare technologies, coupled with a high level of awareness regarding the benefits of automation in medication compounding, creates a conducive environment for market growth. Additionally, the presence of key market players and ongoing research and development activities contribute to North America's pivotal role in driving the expansion of the Global Automated Compounding Device (Oncology) Market.

Key Market Players

Baxter International Inc.

B. Braun SE.

COMECER S.p.A.

ARXIUM Inc.

Omnicell Inc.

Grifols, S.A.

Weibond Technology

Equashield LLC.

ICU Medical, Inc

NewIcon Oy

Report Scope:

In this report, the Global Automated Compounding Device (Oncology) Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automated Compounding Device (Oncology) Market, By Technology:

Gravimetric Compounding System

Volumetric Compounding System

Automated Compounding Device (Oncology) Market, By End User:

Hospitals

Chemotherapy Centers

Others

Automated Compounding Device (Oncology) Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automated Compounding Device (Oncology) Market.

Available Customizations:

Global Automated Compounding Device (Oncology) market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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