

Catheter Introducer Sheaths Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Integrated Introducer Sheaths, Separable Introducer Sheaths), By End user (Hospitals & Clinics, Ambulatory Care Centers, Others), By Region and Competition

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Abstracts

Global Catheter Introducer Sheaths Market was valued at USD 1.32 Billion in 2022 and is anticipated to project steady growth in the forecast period with a CAGR of 4.25% through 2028. The global healthcare industry has witnessed remarkable advancements in recent years, and one of the areas that has seen significant growth is interventional cardiology and radiology. Catheter-based procedures are becoming increasingly common, and catheter introducer sheaths play a pivotal role in these procedures. The Global Catheter Introducer Sheaths Market is a dynamic and thriving sector of the healthcare industry, with numerous factors influencing its growth and trends. Catheter introducer sheaths are medical devices that provide a pathway for other medical instruments, such as catheters, to be introduced into the body. They are typically made of materials like polyethylene, polyurethane, or PTFE and are available in various sizes and shapes to accommodate different clinical applications. These sheaths are essential in a wide range of medical procedures, including angiography, angioplasty, and the placement of pacemakers or other cardiovascular devices.

The global catheter introducer sheaths market has been steadily growing over the past few years. Several factors contribute to this growth, including an aging population, the prevalence of chronic diseases, and the increasing demand for minimally invasive procedures. These sheaths are critical in ensuring the safety and efficiency of catheter-based interventions, which are favoured for their reduced risks, quicker recovery times,

and cost-effectiveness. Cardiovascular diseases are among the leading causes of mortality worldwide. The increasing incidence of conditions like coronary artery disease and heart rhythm disorders has resulted in a growing demand for catheter-based interventions, boosting the market for introducer sheaths. Ongoing developments in catheter introducer sheath materials and design have improved safety, flexibility, and ease of use. These innovations have expanded the range of applications and are attracting healthcare professionals to adopt them.

As the global population continues to age, the demand for catheter-based interventions is on the rise. Elderly individuals are more susceptible to conditions requiring catheterization, such as aortic stenosis or peripheral artery disease. Patients and physicians increasingly prefer minimally invasive procedures over traditional surgeries due to reduced risks, shorter hospital stays, and faster recovery times. Catheter introducer sheaths are essential in facilitating these procedures. Developing countries are investing in their healthcare infrastructure, leading to increased access to advanced medical procedures. This expansion of healthcare facilities is creating new growth opportunities for catheter introducer sheath manufacturers.

Key Market Drivers

Rising Incidence of Cardiovascular Diseases is Driving the Global Catheter Introducer Sheaths Market

Cardiovascular diseases (CVDs) remain a significant global health concern, causing millions of deaths each year. As the incidence of CVDs continues to rise due to various factors such as lifestyle changes and an aging population, the demand for innovative medical devices and procedures is also increasing. One crucial component in cardiovascular interventions is the catheter introducer sheath, a device that allows safe and effective access to blood vessels. The global catheter introducer sheaths market is on the rise, driven by the growing need for cardiovascular interventions. Cardiovascular diseases encompass a wide range of conditions, including coronary artery disease, heart failure, stroke, and peripheral arterial disease. According to the World Health Organization (WHO), CVDs are the leading cause of death worldwide, with an estimated 17.9 million deaths annually.

Modern sedentary lifestyles, characterized by reduced physical activity and unhealthy dietary habits, contribute to obesity and other risk factors for CVDs. As the global population continues to age, the risk of developing cardiovascular diseases increases, with older individuals being more susceptible. Stress, often associated with urban living

and demanding work schedules, has been linked to an increased risk of CVDs. The consumption of high-sugar, high-sodium, and processed foods is associated with a higher risk of hypertension, obesity, and diabetes, all of which contribute to CVD development.

Catheter introducer sheaths are integral components in minimally invasive cardiovascular procedures. These devices facilitate the insertion of various catheters, including angioplasty, stent delivery, and electrophysiology catheters, into blood vessels. They provide a safe entry point into the blood vessel, reducing the risk of complications such as bleeding and vessel damage. Catheter introducer sheaths allow the smooth advancement of guidewires to reach the treatment site. Many sheaths come equipped with hemostatic valves to prevent blood leakage during the procedure. They ensure atraumatic catheter removal post-procedure.

Expanding Geriatric Population is Driving the Global Catheter Introducer Sheaths Market

The global healthcare landscape is undergoing a profound transformation, driven in part by demographic shifts. One of the most significant factors influencing the medical industry is the rapidly expanding geriatric population. As people around the world are living longer, the need for specialized medical devices and procedures is growing. This shift in demographics has had a notable impact on the healthcare sector, particularly in the demand for catheter introducer sheaths. The global population is aging at an unprecedented rate. Factors contributing to this trend include improved healthcare, nutrition, and overall living conditions. This demographic shift has brought about unique healthcare challenges, as older individuals tend to have more complex and chronic medical conditions, many of which require cardiovascular procedures.

Minimally invasive procedures have gained prominence in the medical field due to their reduced recovery times, lower risk of complications, and patient preference. As the elderly population seeks less invasive treatment options, there is a surge in the demand for catheter-based interventions. Catheter introducer sheaths play a vital role in making these procedures safe and effective for older patients, as they provide a means to navigate complex vascular systems. Advancements in material science and medical technology have led to the development of catheter introducer sheaths that are better suited for the elderly population. These innovations focus on improving device flexibility, reducing the risk of complications, and enhancing patient comfort during procedures. These advancements have further fueled the growth of the catheter introducer sheaths market. The global catheter introducer sheaths market is witnessing robust growth as a

result of the increased demand. Geographically, this expansion is not limited to a single region but is observed worldwide. As healthcare systems grapple with the challenges posed by an aging population, the market for these devices is projected to grow steadily in developed and developing economies.

Key Market Challenges

Regulatory Hurdles

One of the most significant challenges in the catheter introducer sheaths market is navigating the complex and ever-evolving regulatory landscape. Stringent regulations are in place to ensure the safety and efficacy of medical devices, but they often lead to delays in product approvals and increased compliance costs. Manufacturers must invest substantial time and resources to adhere to changing standards and demonstrate the safety of their products.

Technological Advancements

The medical device industry is experiencing rapid technological advancements, which can be both a blessing and a curse for catheter introducer sheath manufacturers. On one hand, these advancements present opportunities to develop more advanced and safer products. On the other hand, keeping up with these innovations is challenging, as manufacturers must invest in research and development to stay competitive and meet the evolving demands of healthcare providers.

Competition and Pricing Pressure

The catheter introducer sheaths market is highly competitive, with numerous players vying for market share. This competition often leads to price wars, putting pressure on manufacturers to reduce costs. Lower prices can negatively impact product quality and profit margins, posing a significant challenge for companies looking to maintain profitability while delivering high-quality products.

Healthcare Cost Constraints

In an era where healthcare costs are continually under scrutiny, hospitals and healthcare providers are looking for cost-effective solutions. This has led to a demand for value-based care and cost-effective medical devices, putting further pressure on catheter introducer sheath manufacturers to offer products that balance quality and

affordability.

Supply Chain Disruptions

The COVID-19 pandemic exposed vulnerabilities in the global supply chain, affecting the availability of critical medical devices, including catheter introducer sheaths. Manufacturers must now develop robust supply chain strategies to ensure a consistent supply of these products in the face of future disruptions.

Patient Safety Concerns

The safety of patients is paramount in the healthcare industry. Catheter introducer sheaths must adhere to strict safety standards to prevent complications such as infections, bleeding, or vessel damage. Manufacturers must continually improve the safety features of their products and educate healthcare professionals on their proper use.

Environmental Impact

Increasing awareness of environmental issues has prompted a shift towards more sustainable practices in the healthcare industry. Manufacturers of catheter introducer sheaths must consider the environmental impact of their products, which may necessitate changes in materials and manufacturing processes.

Training and Education

Proper use of catheter introducer sheaths is essential to reduce complications and ensure positive patient outcomes. Manufacturers face the challenge of providing adequate training and education to healthcare professionals to promote safe and effective usage of their products.

Key Market Trends

Technological Advancements

The global healthcare industry has been witnessing a rapid transformation in recent years, with technological advancements playing a pivotal role in enhancing patient care, diagnosis, and treatment. One significant area where these advancements are making a substantial impact is in the realm of interventional cardiology and vascular procedures.

One of the primary factors contributing to the growth of the catheter introducer sheaths market is the development of safer and more precise devices. Technological advancements have led to the creation of sheaths with better visibility, control, and navigation. For instance, manufacturers have introduced sheaths with improved tip designs, allowing for smoother access to vessels, reducing the risk of vessel injury, and ensuring more precise placement of catheters. Additionally, advancements in materials and manufacturing processes have led to the creation of sheaths that are more durable and kink-resistant, further enhancing patient safety and procedure success rates. These improvements are making it possible for healthcare providers to perform a wider range of procedures with a lower risk of complications.

Modern catheter introducer sheaths are increasingly being designed with integrated imaging technologies. These advancements allow real-time visualization of the catheter's position within the patient's vascular system. Some sheaths are equipped with fluoroscopic or ultrasound guidance systems, which enable interventional cardiologists and radiologists to perform procedures with greater accuracy and efficiency. The integration of imaging technologies not only reduces radiation exposure for both patients and healthcare professionals but also enables the precise placement of devices such as stents and embolic agents. This has opened up new avenues for complex, minimally invasive procedures that were once considered high-risk.

Advancements in technology are not limited to the clinical aspects of catheter introducer sheaths; they also focus on improving the overall patient experience. Recent innovations have led to the development of sheaths that minimize patient discomfort and promote faster recovery times. Newer sheaths are often designed with tapered tips and a smoother surface finish, making vessel access less traumatic and painful for patients. In addition, there is a growing trend toward reducing the size of sheath entry sites, resulting in smaller incisions and less bleeding, which leads to quicker healing and shorter hospital stays.

Another exciting trend in the catheter introducer sheaths market is the move toward customization and personalization. Technology is enabling healthcare professionals to select sheaths that best suit their patients' unique needs. Manufacturers are offering a wide variety of sheath sizes, shapes, and materials, ensuring that each procedure is tailored to the individual patient. Moreover, 3D printing and other advanced manufacturing techniques are allowing for the creation of patient-specific sheaths that perfectly match the anatomical structure of the target vessel. This level of customization not only enhances patient outcomes but also contributes to the growth of the market as more healthcare providers seek tailored solutions. In an era where telemedicine is

becoming increasingly prevalent, technology is also driving growth in the catheter introducer sheaths market by facilitating remote procedures. With the aid of robotic-assisted systems, skilled physicians can guide catheters and sheaths through patients' vascular systems from a distant location. This not only enhances access to specialized care in underserved areas but also minimizes the risk of disease transmission and improves patient safety.

Segmental Insights

Product Insights

Based on the category of product, Integrated Introducer Sheaths emerged as the dominant player in the global market for Catheter Introducer Sheaths in 2022. Integrated introducer sheaths are designed with all the necessary components in one piece. This streamlined design reduces the number of connections, decreasing the risk of leaks, and making the procedure more efficient. This is in stark contrast to traditional introducer sheaths, which require assembly, adding complexity to the process. Safety is paramount in healthcare, and integrated introducer sheaths prioritize this aspect. Their design reduces the risk of air embolisms, kinks, and disconnections that can occur with traditional sheaths. This improvement in safety is a game-changer for both patients and healthcare providers. The one-piece design of integrated introducer sheaths simplifies the insertion process, making it more user-friendly for medical professionals. This reduces the learning curve, ensuring that more healthcare providers can effectively use these devices. While integrated introducer sheaths may have a slightly higher upfront cost, they often prove more cost-effective in the long run. The reduced need for additional components, decreased risk of complications, and shorter procedure times can result in significant cost savings for healthcare facilities. Integrated introducer sheaths offer a smoother transition for catheter insertion, minimizing discomfort for patients. This contributes to a better overall patient experience and can potentially lead to quicker recovery times.

End user Insights

The Hospitals & Clinics segment is projected to experience rapid growth during the forecast period. Hospitals, especially those equipped with cardiac catheterization labs and interventional radiology departments, conduct a high volume of diagnostic and interventional procedures. These facilities require a steady supply of catheter introducer sheaths to meet the growing demand for minimally invasive treatments. Hospitals and clinics house highly skilled medical professionals, including interventional cardiologists,

vascular surgeons, and radiologists, who are well-versed in the use of catheter introducer sheaths. Their expertise in performing complex procedures necessitates the use of these devices. Leading hospitals and clinics invest in state-of-the-art equipment, including advanced catheter introducer sheaths, to ensure precision and safety during medical procedures. They are more likely to adopt the latest technological advancements in the field.

Regional Insights

North America emerged as the dominant player in the global Catheter Introducer Sheaths market in 2022, holding the largest market share in terms of value. One of the primary drivers of North America's dominance in the catheter introducer sheaths market is its commitment to technological advancements and innovations. The region boasts a robust medical device industry that continually invests in research and development. This emphasis on innovation has resulted in the production of state-of-the-art catheter introducer sheaths that offer superior performance, safety, and patient comfort. North American manufacturers consistently introduce new materials, designs, and features to enhance the efficiency of catheter introducer sheaths. These innovations attract healthcare professionals and facilities worldwide, increasing the region's market share. North America is home to some of the world's leading healthcare facilities and hospitals. The strong healthcare infrastructure in the region contributes to the high demand for advanced medical devices, including catheter introducer sheaths. These medical institutions are early adopters of cutting-edge technologies and often prefer high-quality products for their patients. This preference further boosts the adoption of catheter introducer sheaths in North America.

Key Market Players

Terumo Corporation

Merit Medical Systems, Inc.

Medtronic plc

Galt Medical Corporation

Cordis Corporation

Oscor Inc

Abbott Laboratories

Stryker Corporation

Becton, Dickinson and Company

B. Braun Interventional Systems Inc.

Report Scope:

In this report, the Global Catheter Introducer Sheaths Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Catheter Introducer Sheaths Market, By Product:

Integrated Introducer Sheaths

Separable Introducer Sheaths

Catheter Introducer Sheaths Market, By End user:

Hospitals & Clinics

Ambulatory Care Centers

Others

Catheter Introducer Sheaths 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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Catheter Introducer Sheaths Market.

Available Customizations:

Global Catheter Introducer Sheaths 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).

Contents

1.PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. GLOBAL CATHETER INTRODUCER SHEATHS MARKET OUTLOOK

- 4.1. Market Size & Forecast
 - 4.1.1. By Value
- 4.2. Market Share & Forecast
 - 4.2.1. By Product (Integrated Introducer Sheaths, Separable Introducer Sheaths)
 - 4.2.2. By End user (Hospitals & Clinics, Ambulatory Care Centers, Others)
 - 4.2.3. By Region
 - 4.2.4. By Company (2022)
- 4.3. Market Map
 - 4.3.1. By Product

4.3.2. By End user

4.3.3. By Region

5. ASIA PACIFIC CATHETER INTRODUCER SHEATHS MARKET OUTLOOK

5.1. Market Size & Forecast

5.1.1. By Value

5.2. Market Share & Forecast

5.2.1. By Product

5.2.2. By End user

5.2.3. By Country

5.3. Asia Pacific: Country Analysis

5.3.1. China Catheter Introducer Sheaths Market Outlook

5.3.1.1. Market Size & Forecast

5.3.1.1.1. By Value

5.3.1.2. Market Share & Forecast

5.3.1.2.1. By Product

5.3.1.2.2. By End user

5.3.2. India Catheter Introducer Sheaths Market Outlook

5.3.2.1. Market Size & Forecast

5.3.2.1.1. By Value

5.3.2.2. Market Share & Forecast

5.3.2.2.1. By Product

5.3.2.2.2. By End user

5.3.3. Australia Catheter Introducer Sheaths Market Outlook

5.3.3.1. Market Size & Forecast

5.3.3.1.1. By Value

5.3.3.2. Market Share & Forecast

5.3.3.2.1. By Product

5.3.3.2.2. By End user

5.3.4. Japan Catheter Introducer Sheaths Market Outlook

5.3.4.1. Market Size & Forecast

5.3.4.1.1. By Value

5.3.4.2. Market Share & Forecast

5.3.4.2.1. By Product

5.3.4.2.2. By End user

5.3.5. South Korea Catheter Introducer Sheaths Market Outlook

5.3.5.1. Market Size & Forecast

5.3.5.1.1. By Value

5.3.5.2. Market Share & Forecast

5.3.5.2.1. By Product

5.3.5.2.2. By End user

6. EUROPE CATHETER INTRODUCER SHEATHS MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product

6.2.2. By End user

6.2.3. By Country

6.3. Europe: Country Analysis

6.3.1. France Catheter Introducer Sheaths Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Product

6.3.1.2.2. By End user

6.3.2. Germany Catheter Introducer Sheaths Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Product

6.3.2.2.2. By End user

6.3.3. Spain Catheter Introducer Sheaths Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Product

6.3.3.2.2. By End user

6.3.4. Italy Catheter Introducer Sheaths Market Outlook

6.3.4.1. Market Size & Forecast

6.3.4.1.1. By Value

6.3.4.2. Market Share & Forecast

6.3.4.2.1. By Product

6.3.4.2.2. By End user

6.3.5. United Kingdom Catheter Introducer Sheaths Market Outlook

6.3.5.1. Market Size & Forecast

6.3.5.1.1. By Value

6.3.5.2. Market Share & Forecast

6.3.5.2.1. By Product

6.3.5.2.2. By End user

7. NORTH AMERICA CATHETER INTRODUCER SHEATHS MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product

7.2.2. By End user

7.2.3. By Country

7.3. North America: Country Analysis

7.3.1. United States Catheter Introducer Sheaths Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Product

7.3.1.2.2. By End user

7.3.2. Mexico Catheter Introducer Sheaths Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Product

7.3.2.2.2. By End user

7.3.3. Canada Catheter Introducer Sheaths Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Product

7.3.3.2.2. By End user

8. SOUTH AMERICA CATHETER INTRODUCER SHEATHS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Product

- 8.2.2. By End user
- 8.2.3. By Country
- 8.3. South America: Country Analysis
 - 8.3.1. Brazil Catheter Introducer Sheaths Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product
 - 8.3.1.2.2. By End user
 - 8.3.2. Argentina Catheter Introducer Sheaths Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product
 - 8.3.2.2.2. By End user
 - 8.3.3. Colombia Catheter Introducer Sheaths Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product
 - 8.3.3.2.2. By End user

9. MIDDLE EAST AND AFRICA CATHETER INTRODUCER SHEATHS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product
 - 9.2.2. By End user
 - 9.2.3. By Country
- 9.3. MEA: Country Analysis
 - 9.3.1. South Africa Catheter Introducer Sheaths Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product
 - 9.3.1.2.2. By End user
 - 9.3.2. Saudi Arabia Catheter Introducer Sheaths Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Product

9.3.2.2.2. By End user

9.3.3. UAE Catheter Introducer Sheaths Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Product

9.3.3.2.2. By End user

10. MARKET DYNAMICS

10.1. Drivers

10.2. Challenges

11. MARKET TRENDS & DEVELOPMENTS

11.1. Recent Developments

11.2. Product Launches

11.3. Mergers & Acquisitions

12. GLOBAL CATHETER INTRODUCER SHEATHS MARKET: SWOT ANALYSIS

13. PORTER'S FIVE FORCES ANALYSIS

13.1. Competition in the Industry

13.2. Potential of New Entrants

13.3. Power of Suppliers

13.4. Power of Customers

13.5. Threat of Substitute Product

14. COMPETITIVE LANDSCAPE

14.1. Terumo Corporation

14.1.1. Business Overview

14.1.2. Company Snapshot

- 14.1.3. Product & Services
- 14.1.4. Current Capacity Analysis
- 14.1.5. Financials (In case of listed)
- 14.1.6. Recent Developments
- 14.1.7. SWOT Analysis
- 14.2. Merit Medical Systems, Inc.
- 14.3. Medtronic plc
- 14.4. Galt Medical Corporation
- 14.5. Cordis Corporation
- 14.6. Oscor Inc
- 14.7. Abbott Laboratories
- 14.8. Stryker Corporation
- 14.9. Becton, Dickinson and Company
- 14.10. B. Braun Interventional Systems Inc.

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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