

Drug Delivery Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Application (Cancer, Cardiovascular, Diabetes, Infectious Diseases, and Other Applications), By Route of Administration (Injectable, Topical, Ocular, and Others), By End User (Hospitals, Ambulatory Surgical Centers, and Others), By Region and Competition, 2019-2029F

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Abstracts

Global Drug Delivery Devices Market was valued at USD 240.62 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 7.80% through 2029. Global drug delivery devices are specialized instruments designed for administering drugs or therapeutic materials through specific routes. These medical treatments involve utilizing the devices either once or multiple times. Drug delivery devices present unique challenges in various aspects of product development, including regulatory strategy, design and material considerations, and the development and implementation of testing procedures. The administration of pharmacological substances through drug delivery is a crucial component in providing therapeutic effects to individuals or animals. The utilization of drug delivery systems by patients and clinicians is driven by the growing number of diabetic patients, as well as the increasing incidence of cancer and respiratory disorders.

Drug delivery devices are classified as medical devices that exclusively administer drugs to the body through specific routes of administration. This targeted drug delivery to the precise site yields advantages such as enhanced accuracy, ease of use, and reduced frequency of dosing. Additionally, drug delivery devices offer the benefit of

minimizing variability in systemic drug concentrations, resulting in more reliable absorption aligned with the site and mechanism of action. Various types of drug delivery devices are available in the market, including smart pills, inhalers, drug-eluting stents, safety syringes, and others. These devices find utility across diverse medical settings, such as hospitals, diagnostic centers, and ambulatory surgery centers.

Key Market Drivers

Rising Prevalence of Chronic Diseases

The increasing prevalence of chronic diseases, including cardiovascular diseases, diabetes, cancer, and other ailments, is projected to drive the growth of the drug delivery devices market. Due to the escalating prevalence of chronic diseases such as cardiovascular, diabetes, cancer, neurodegenerative diseases, and infectious diseases, there is a growing demand for drug delivery devices on a global scale. The market is being propelled by technological advancements and the adoption of various types of drug delivery devices for diseases like diabetes, cancer, and others. The drug delivery devices market is further driven by the self-management of patient treatments and the objective to reduce hospital and clinic visits. Diabetes mellitus is a metabolic disorder that affects the utilization of glucose in the body, impacting approximately 9% of the global population. According to the International Diabetes Federation, there are 537 million people worldwide living with Diabetes Mellitus, and this number is expected to reach 783 million by 2045. Type 1 Diabetes (T1DM) accounts for around 10% of DM cases and typically manifests in children or young adults – currently, there are over 1.2 million individuals worldwide under the age of 20 living with T1DM.

Growth In the Demand of Biologics

Biologics often require parenteral administration, which can be intimidating or inconvenient for patients. Drug delivery devices, such as auto-injectors and prefilled syringes, make the process more patient-friendly, increasing patient compliance and acceptance of biologic therapies. Maintaining the stability and sterility of biologics is essential. Drug delivery devices, especially preloaded syringes and infusion pumps, minimize the risk of contamination, ensuring the integrity of the biologic product during administration.

The rapid expansion of the biopharmaceutical industry has led to the development of various new drugs that demonstrate efficacy in treating a wide range of diseases. Substantial investments by drug manufacturers in clinical trials, coupled with the active

involvement of regulatory authorities such as the FDA and EMA, are propelling the advancement of innovative new drugs. The introduction of new drugs to the market often necessitates the use of innovative delivery devices, thereby driving the demand for various drug delivery devices. Furthermore, the presence of key market players and their strategic initiatives such as acquisitions, mergers, collaborations, and new product launches further enhance market growth. Moreover, increased investments in marketing activities by market players positively impact market expansion.

Increasing Investments by Pharmaceutical Companies

Pharmaceutical companies are continuously striving to enhance drug delivery and patient compliance through innovative product solutions. By improving the performance of primary components for parenteral packaging, the superior delivery of injectable medicines is ensured, benefiting both patients and drug companies. For instance, in May 2021, Eli Lilly and Company entered into strategic international agreements with four companies, including Glooko Inc., DexCom, Inc., myDiabby Healthcare, and Roche, to enhance connected solutions and streamline care for people living with diabetes in markets outside of the United States. These companies offer robust diabetes management platforms that are compatible with Lilly's Tempo Pen, authorized in several global markets, and Tempo Smart Button, currently in late-stage development, to assist individuals with diabetes and healthcare professionals. The industry as a whole focuses on collaboration, the introduction of new products, and the pursuit of revenue generation, which fuels market growth. Introducing new products with improved safety features and user-friendly characteristics is expected to attract attention from major pharmaceutical companies. Moreover, enhanced dosage characteristics support the efficacy of drug therapy and enhance disease management in homecare settings. For example, in November 2022, Ypsomed introduced Ypso Mate, touted as the world's first auto-injector for prefilled syringes with integrated connectivity. It is designed for self-administration. Additionally, there is an increasing number of market participants collaborating with pharmaceutical corporations to develop and promote products.

Technological Advancement

The drug delivery device has witnessed substantial innovation over the years, with no signs of slowing down. Notable advancements have been made in established technologies like insulin delivery devices and inhalers, as well as the exploration of novel drug delivery methods. Leading companies such as Medtronic and Tandem Diabetes Care have made significant contributions, while emerging players are also

making their mark. Ongoing research continues to uncover new therapeutic delivery approaches. For example, enable 2019, based in Cincinnati, has partnered with Sanofi to develop long-term manufacturing and supply arrangements using the company's multiple molecule development programs. Enable Injections is focused on developing a subcutaneous drug delivery platform called enFuse, which serves as an on-body patch. This innovative platform enables patients to administer high-volume therapeutics subcutaneously outside of the hospital, using a self-contained drug transfer system that is compatible with standard syringes and vial container formats. To enhance drug delivery convenience for both patients and practitioners, drug-delivery devices are becoming increasingly sophisticated. Modern devices incorporate special features designed to facilitate self-dosing and encourage patient adherence to complex regimens. Wearable devices are also promoting active lifestyles, while connectivity options enable support for digital health monitoring.

Key Market Challenges

High Price of the Device

High device costs can pose a barrier to patient access, especially for those without adequate insurance coverage or with limited financial means. Patients may forego necessary treatments or opt for alternative, less effective options due to cost concerns. Healthcare systems and hospitals may face budget limitations, making it challenging to invest in expensive drug delivery devices on a large scale. This can lead to delays or limitations in the adoption of advanced devices. Healthcare providers and payers assess the cost-effectiveness of medical treatments and technologies. High-priced devices may be scrutinized more closely to ensure that their benefits justify their costs, potentially slowing down adoption.

Stringent Regulations and Products Recall

Stringent regulations and product recalls impose limitations on market growth. The approval process for technologically advanced drug delivery devices developed recently may require time from government agencies. In the event of a product recall, the retrieval and replacement of defective products may result in significant losses for companies and manufacturers. These factors act as constraints on market expansion. The quality and regulatory requirements vary across industries, and one of the key challenges arises when companies are unaware of the slight differences in governing the constituent products of a combination product. In the injectable drug delivery segment, there have been several product recalls in recent years. These recalls can be

voluntary or may be initiated by regulatory authorities. It is crucial to identify and address usability issues during the development process. The presence of visible foreign matter during retention sample testing in injectables can lead to severe health consequences, such as permanent impairment of bodily functions, damage and/or obstruction of blood vessels, local inflammation, phlebitis, allergic responses, embolization, and infection. Contamination from inorganic materials like glass, silicone, and stainless steel, as well as incomplete filling of vials, are among the other reasons that contribute to injectable recalls.

Key Market Trends

Government Investments on Healthcare Infrastructure

The increase in funding by the federal government is poised to drive market growth. Additionally, the government's growing initiatives to provide optimal drugs for cancer, infectious diseases, respiratory diseases, diabetes, cardiovascular diseases, and other conditions in remote areas will further pave the way for growth. Moreover, the rise in personal disposable income levels, introduction of technologically advanced products in hospitals, increasing investment in the development of advanced medical products and devices, and the growing number of cancers, respiratory disease, and diabetic patients in emerging economies, are all factors that will positively impact the market growth rate.

Upsurge In the Public-Private Funding

The growth and expansion of the healthcare industry, propelled by both public and private players, particularly in developing economies, will create lucrative market growth opportunities. There is an anticipated upsurge in public-private funding for targeted research activities, accompanied by increasing levels of air pollution. Moreover, product innovations and developments driven by technological advancements worldwide will create profitable opportunities for market players within the forecast period of 2025 to 2029. Furthermore, the market's growth rate is expected to be enhanced by the rising number of strategic collaborations, increasing internet penetration rate, expanding number of hospitals and laboratories, and the growing per capita expenditure on healthcare.

Segmental Insights

Route Of Administration Insights

Based on the route of administration, the market is classified into injectable, topical, ocular, and others. The injectable segment is projected to exhibit significant growth during the forecast period. This can be attributed to its ability to deliver medications directly to the target site, allowing for localized treatment. As a result, the injectable sector is expected to hold a substantial share of the drug delivery market. Furthermore, the expansion of this category will be driven by the growing preference of patients for ready-to-use devices over vial-and-syringe products. Whether influenced by market demand or technological advancements, the ultimate objective remains the same - to enhance therapeutic efficacy and improve patient quality of life.

End User Insights

Hospitals are projected to dominate the market in the forecast period owing to their significant patient foot traffic and their crucial role as a component of healthcare infrastructure. As more patients visit hospitals, the number of people receiving medication from hospital pharmacies is expected to increase. The segmental expansion will be further supported by the rising distribution of these systems from hospitals, which is anticipated to occur in many different countries as hospitals gain popularity. The global market for hospital pharmaceuticals is likely to benefit from the sharp increase in the prevalence of numerous chronic diseases such as diabetes, cancer, and a wide range of cardiovascular ailments. Moreover, the rising healthcare costs in emerging nations are expected to drive the demand for hospital medications.

Regional Insights

North America holds the largest market share, primarily due to the presence of major players and the increasing adoption of drug delivery systems. The region's market growth is further supported by enhanced awareness of the benefits associated with drug delivery systems. Market expansion is anticipated to be facilitated by increased product approvals in countries like the U.S. For instance, Aptar Pharma received FDA approval for the utilization of its nasal drug delivery system. Europe accounts for a significant share of the global market in 2023 and is expected to experience moderate growth. Major market players in the region have access to vast markets owing to their developed economies and favorable regulatory frameworks. The Asia Pacific region is projected to exhibit the highest growth rate, driven by its robust economic growth. Moreover, the presence of a large patient base in countries such as India, China, Japan, and China is leading to increased adoption of drug delivery technology by various end-users. In Japan, different drug delivery devices are utilized for specific drug types.

Key Market Players

Pfizer Inc.

Novartis AG

F Hoffmann-La Roche Ltd

Johnson and Johnson

Bayer AG

Becton, Dickinson and Company

Altaris Capital Partners, LLC

Holozymes Inc. (Antares Pharma Inc.)

GlaxoSmithKline PLC

Teva Pharmaceutical Industries Ltd

Report Scope:

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

Drug Delivery Devices Market,By Application:

oCancer

oCardiovascular

oDiabetes

oInfectious Diseases

oOther Applications

Drug Delivery Devices Market,By Route of Administration:

oInjectable

oTopical

oOcular

oOthers

Drug Delivery Devices Market,By End User:

oHospitals

oAmbulatory Surgical Centres

oOthers

Drug Delivery Devices Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Drug

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Delivery Devices Market.

Available Customizations:

Global Drug Delivery Devices marketreport 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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