

North America Vacuum Blood Collection Tube Market Size and Forecasts (2020 - 2030), Regional Share, Trends, and Growth Opportunity Analysis By Product (Serum Separating Tubes, EDTA Tubes, Heparin Tubes, Glucose Tubes, ESR Tubes, and Others), Material (PET, Polypropylene, and Tempered Glass), Application (Blood Routine Examination, Biochemical Test, and Coagulation Testing), End User (Blood Banks, Hospitals and Clinics, Pathology Labs, and Others), and Country (US, Canada, and Mexico)

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Abstracts

The North America vacuum blood collection tube market is expected to reach US\$ 2.041 billion in 2030 from US\$ 1.164 billion in 2022. The market is estimated to grow with a CAGR of 7.3% from 2022 to 2030.

The key factors driving the market's growth include the increasing number of surgeries and growing blood donation rate and blood tests. However, the risk associated with needlestick injuries hinders the market growth.

Market Driver of North America Vacuum Blood Collection Tube Market

With increasing awareness and blood donation campaigns and initiatives, several individuals are willingly donating blood, resulting in a high blood donation rate. To ensure a safe blood donation, robust screening processes are carried out to identify potential infections and minimize the risk of disease transmission. These screenings

involve the use of vacuum blood collection tubes to collect blood samples from donors for testing. Donor screening tests include infectious disease screening (such as HIV, hepatitis, and syphilis) and additional tests specific to blood safety protocols. The increasing importance of blood donor screening drives the demand for vacuum blood collection tubes to collect and transport blood samples for testing.

As per the American National Red Cross estimates, each year, more than 6.8 million people donate blood in the US. 13.6 million units of red blood cells and whole blood is collected in the US in a year. Approximately 21 million blood components are transfused each year in the US. Moreover, with the rise of blood disorders, the requirement for blood and blood testing is increasing. For instance, about 1,000 babies are born with sickle cell disease each year, and it affects 90,000 to 100,000 people in the US. Sickle cell patients may require blood transfusions throughout their lives.

Similarly, as per the American Cancer Society estimates, more than 1.9 million people were diagnosed with cancer in 2021, and 608,570 people died due to cancer. It is also reported that 1 in 2 men and 1 in 3 women will be diagnosed with cancer in their lifetime in the US. Many of them will need blood, sometimes daily, during their chemotherapy treatment. Thus, according to the American National Red Cross, approximately 36,000 units of red blood cells are needed every day in the US. It is estimated that 111 million US citizens, or 37% of the US population, are eligible blood donors. However, less than 10% of the 37% of eligible blood donors donate annually. The Red Cross provides about 40% of the nation's blood and blood components, all from generous volunteer donors.

The growing blood donation rate and the increasing demand for blood tests drive the demand for vacuum blood collection tubes in North America. These tubes support the collection, storage, transportation, and analysis of blood samples, ensuring the integrity and accuracy of diagnostic testing. The availability of vacuum blood collection tubes is crucial for healthcare providers to effectively conduct blood tests, enhance patient care, and support life-saving transfusions.

Factors Hampering North America Vacuum Blood Collection Tube Market

There is a risk of percutaneous injury associated with a needle. According to the American Medical Association estimates, each year, ~600,000 to 800,000 needlestick injuries occur in the US. There are various risks associated with blood drawing, such as pain, bruising, infection, bleeding, fainting, and hematoma at the injection site. Several diseases are transmitted through these injuries, including hepatitis B, acquired immune

deficiency syndrome (AIDS), and hepatitis C. As a result of accidental punctures, hazardous fluids can be injected into the body through the skin by contaminated needles. Injecting hazardous drugs is possible; however, the most significant concern is infection with infectious fluids, especially in the blood. Even small amounts of infectious fluid can spread diseases.

Further, the majority of vacuum blood collection tubes are made from plastic materials such as polyethylene terephthalate (PET) or polypropylene. While plastic materials used in these tubes are compliant with regulatory requirements and meet safety standards, there is a rapidly increasing concern regarding the environmental impact of plastics and the need for sustainable alternatives. The increasing focus on environmental responsibility and sustainability may drive the market to explore and adopt alternate materials, which can require additional research, development, and costs. Thus, these factors have also surfaced as a significant deterrent for the North America vacuum blood collection tube market.

Vacuum Blood Collection Tube Market: Segmental Overview

The North America vacuum blood collection tube market, by product, is segmented into heparin tubes, EDTA tubes, glucose tubes, serum separating tubes, ERS tubes, and others. In 2022, the serum separating tubes segment held the largest share of the market. The EDTA tubes segment is expected to grow at the highest CAGR during 2022–2030. Serum separating tubes (SSTs) are coated with micro silica particles, which induces clotting blood, and the barrier gel effectively separates serum from fibrin and cells while restricting substance exchange between blood cell and serum. During centrifugation, the clot activator (silica particle) speeds up clotting and acts as a barrier gel, separating serum from fibrin and cells. SSTs are commonly used for blood serum biochemistry, immunology, serology, drug testing, etc. Both non-vacuum and vacuum gel and clot activator tubes are available in the market.

Based on material, the North America vacuum blood collection tube market has been segmented into PET, polypropylene, and tempered glass. The PET segment held the largest share of the market in 2022 and is expected to grow at the highest CAGR during 2022–2030.

Based on application, the North America vacuum blood collection tube market is segmented into blood routine examination, biochemical test, and coagulation testing. The blood routine examination segment held the largest share of the market in 2022, and the biochemical test segment is anticipated to register the highest CAGR in the

market during 2022–2030.

Based on end user, the North America vacuum blood collection tube market is segmented into hospitals and clinics, ambulatory surgical centers, pathology labs, and blood banks. The hospitals and clinics segment held the largest share of the market in 2022 and blood banks is anticipated to register the highest CAGR in the market during 2022–2030.

North America Vacuum Blood Collection Tube Market: Regional Overview

The US is estimated to hold the largest share of the North America vacuum blood collection tube market during 2022–2030. Although the US has a well-developed healthcare sector equipped with highly advanced equipment and instruments, it experiences increasing incidences of chronic diseases and multiple organ dysfunction syndromes or sepsis, which is likely to favor the growth of the vacuum blood collection tube market. According to the report “Chronic Kidney Disease in the United States, 2023” by the Centers for Disease Control and Prevention, 14% of ~35.5 million people suffer from chronic kidney disease (CKD) in the US. Furthermore, 9 in 10 people are not aware that they are suffering from CKD. Hypertension, diabetes, heart disease, and obesity are the causes of CKD. Thus, with the growing incidences of high blood pressure, heart disease, diabetes, and obesity, the demand for blood testing for diagnostics and research purposes increases in the US, which propels the vacuum blood collection tube market growth in North America.

An increase in organ transplant procedures performed across the US can be associated with an upsurge in blood transfer procedures that require blood testing to identify blood groups and tissue types. The American Cancer Society estimates that more than 1.9 million people will be diagnosed with cancer in 2023. Many cancer patients need to undergo blood transfusion procedures as a part of the management of chemotherapy or radiation side effects or to make up for the blood lost during surgeries. According to the United Network for Organ Sharing (UNOS), 42,887 organ transplants were performed in the US in 2022, recording an increase of 3.7% over 2021. The American Red Cross Blood Services reported that someone in the US requires blood for cancer therapies, surgeries, traumatic injuries, and other chronic illness treatments every two seconds. Thus, the demand for vacuum blood collection tubes increases with the increasing demand for blood testing due to rising incidences of kidney and other chronic diseases in the US.

A few of the major primary and secondary sources referred to while preparing the report

on the vacuum blood collection tube market are the World Bank Data, National Health Service (NHS), FDA (Food and Drug Administration), EMA (European Medicines Agency), and WHO (World Health Organization).

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