

Infusion Pumps Worldwide

A Market Strategy Report

Report Highlights

July 2006

Report Benefits

This report can help in:

- Assessing the market for Infusion Pumps, growth segments, and growth regions.
- Understanding market drivers and restraints.
- Business planning, strategic decision making and competitive strategy.
- Identifying opportunities for partnerships and alliances.

Key Takeaways

- Main market driver: Medication errors and safety issues associated with medication delivery.
 - This is creating demand for new pump designs with proactive alert features, and data analysis tools.
- Infusion pumps are becoming more integrated with the hospital information infrastructure.
 - Suppliers must look beyond the primary function of medication delivery to information collection, dissemination, and analysis functions and features.

Key Takeaways

- Baxter, Cardinal Health (Alaris), Hospira, Medtronic, and B. Braun are the US infusion pump market leaders.
- The “medication management systems” business model has emerged.
 - There is convergence of infusion devices and information technologies – and specific designs to reduce medication errors and improve patient safety, drive down cost and promote operational efficiencies.

Key Takeaways

- Indicative of the above trend is the increasing reliance on software, data logs, programming, and network communications.
- Market leaders are focusing on developing custom solutions that enable the setting up of drug, concentration and dose parameters by care area or patient type.

Growth Drivers

- Medication errors and safety issues associated with medication delivery.
- Push for reduced hospital stays and the resultant need for ambulatory infusion devices for a variety of clinical situations.
- Aging of the population and increased incidence of neurological conditions requiring pain medications.
- Increased microprocessor capacities and ubiquity of networks.
- Patient comfort and desire to maintain active lifestyles (insulin).

Growth Restraints

- Significant penetration already achieved in many sub-segments; revenue growth mostly from replacement sales and administration sets.
- Slow to moderate technology advances compared to the overall medical devices sector.
- Product complexity and training challenges limiting the ability to achieve full ROI on devices (at some hospitals).

Successful suppliers help providers.....

- Improve patient quality of life, while ensuring safety and comfort (ambulatory segment).
- Improve the operational efficiency of health care facilities (all pump segments).
- Improve patient outcomes, thereby reducing length of stay and costs.
- Train clinical staff in various health settings.

Ambulatory Segment Evolution

- ❖ **1970s:** Ambulatory Pumps introduced
- ❖ **1980s:** Beginnings of microprocessor circuitry and improved battery design – reducing device size and weight
- ❖ **1990s:** Improved vascular access through implantable central venous catheters and access ports; user prompting; self-diagnosis and alerts; error message codes; and data logs; external open-loop insulin pumps
- ❖ **2000s:** Slow infusion into the surgical site through disposable elastomeric devices or compression spring-driven syringes; programmable dose syringes with insulin cartridges; Transtelephonic status checks and over-the-phone reprogramming
- ❖ **2007-2010:** Abdomen implantable open-loop insulin pumps with remote programming through a radio transmitter; one- to three-month insulin supply reservoir
- ❖ **Beyond 2010:** Subcutaneous glucose sensors; non-pump technologies such as nasal inhalation; insulin suppositories; transdermal patches; implantable insulin matrix; implantable pancreatic cells (microencapsulated); and genetic engineering solutions

Sample Data Table

Implantable Drug Infusion Pumps Market - United States (2005 - 2013)

Segment	2005	2006	2007	2008	2009	2010	2011	2012	2013	CAGR
Constant Flow Pumps										
Unit Sales										
Unit Sales Growth										
Avg. Selling Price (ASP)										
Revenues (\$ Million)										
Revenue Growth										
Programmable Pumps										
Unit Sales										
Unit Sales Growth										
Avg. Selling Price (ASP)										
Revenues (\$ Million)										
Revenue Growth										
Disposables (Admin Sets)										
Revenues (\$ Million)										
Revenue Growth										
Total Market										
Revenues (\$ Million)										
Units										
Revenue Growth										

Source: Marketstrat®

Regions Covered	USA, Canada, France, Germany, Italy, UK, Rest of Europe (ROEU), Japan, Rest of the World
Product/Market Segments	<ul style="list-style-type: none"> • Implantable Drug Infusion Pumps (Constant Flow, Programmable) • Syringe Infusion Pumps (High-End, Low-End) • Large Volume (Volumetric) Infusion Pumps • Ambulatory Infusion Pumps (Electronic, Non-Electronic, Disposable Pain Management) • Administration Sets
Companies Profiled	200+ worldwide
Market Estimates/ Forecasts	Estimates/Forecasts for 2005-2013 in Units & US dollars, separately by Device Type and by Region.
MARKETSTRAT Analytical Framework	Drivers and Restraints; Competitive Framework; SRCE Framework; Key Market Parameters (KeyMAP Grid)
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