

2020 Edition

Medical Electronics Market for Interconnect Solutions

Research Report M-1501-20
July 2020



 **Bishop & associates, inc.**
Performance and Forecast of the World Connector Industry

Medical Electronics Market for Interconnect Solutions

Report No: M-1501-20
July 2020

Focusing on connectors used in the medical electronics market, Bishop & Associates Inc. is pleased to announce the release of their newest research report, **Medical Electronics Market for Interconnect Solutions**. This 12-chapter, 472-page report examines electronic connectors and cable assemblies used in the medical sector and the equipment these connectors and assemblies are found on. Also examined are the market trends, regulations, and requirements to be successful as an equipment manufacturer and supplier.



A market sector where failure can literally mean the difference between life and death, this report analyzes electronic packaging characteristics unique to the medical market and the types of connectors and cable assemblies that are needed to succeed in the medical space.

OEM equipment interconnect needs are analyzed. The connector requirements are shown for major imaging equipment like CT, MRI, x-ray, and ultrasound equipment. Requirements for monitoring equipment and cabling is also examined, including opportunities for disposable sensor cable assemblies. Special attention is given to the environment where medical connectors are used, including cleaning, disinfecting, sterilization, and rigorous reprocessing techniques used to minimize cross contamination and the spread of bacteria, viruses, and other potentially harmful infections.

We also look at connectors, cables, and instruments used inside the body, either temporarily during surgery or exams, or long term in implanted devices. The report takes a close look at trends for endoscopes, surgical robotics, dental and electrosurgical equipment which use a variety of reusable and disposable connectors. The latest report also contains a thorough analysis of the Therapeutic market, including a close look at connectors and cables used for respiratory equipment, such as ventilators used to treat patients with breathing impairments caused by the Coronavirus. We also provide an in-depth review of defibrillators, AED's, and emerging wearable defibrillator products and the connectors and cables needed to support them.

The report discusses the unique materials, manufacturing processes, and interconnect designs that optimize connectors and cables for medical applications. Included is a comprehensive overview of the top 10 suppliers of medical connectors and assemblies, examining the strategies of these suppliers, including their approach to the market, acquisition strategies, and overall direction in the medical market.

In addition to connector suppliers, a detailed discussion of the top 10 medical device companies is included. In 2019, the medical device market reached \$451.6 billion with growth of 5.6% higher than 2018. The market is very fragmented with the top 10 medical device companies accounting for \$189.7 billion, 42% of the medical device market. Many other medical device companies make up the remaining \$262 billion (58%) of the market.

Overall medical market drivers and trends, as well as political, economic, sociocultural, technological, environmental, and legal factors are discussed and sales and forecast numbers by region, sub-sector, and product type are provided for the years 2017 through 2025.

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A sampling of the tables included in this report and the level of numerical detail are shown below.

**Total World Medical Connector Sales by Region
2017 through 2025 - With Percent Change and Five-Year CAGR**

Region	2017	2018	Percent Change	2019	Percent Change	2020	Percent Change	2021	Percent Change
North America	\$XX.X	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Europe	\$XX.X	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Japan	\$XX.X	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
China	\$XX.X	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Asia Pacific	\$XX.X	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
ROW	\$XX.X	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Total World	\$XX.X	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%

\$ Millions

Region	2022	Percent Change	2023	Percent Change	2024	Percent Change	2025	Percent Change	Five-Year CAGR
North America	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Europe	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Japan	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
China	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Asia Pacific	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
ROW	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Total World	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%

\$ Millions

**ROW Medical Connector Sales by Medical Equipment Sub-Sector
2017 through 2025 - With Percent Change and Five-Year CAGR**

Medical Sub-Sector	2017	2018	Percent Change	2019	Percent Change	2020	Percent Change	2021	Percent Change
Diagnostic & Imaging Equipment	\$32.1	\$35.8	11.5%	\$34.3	-4.2%	\$26.5	-22.6%	\$37.6	41.7%
Therapeutic Equipment	\$29.0	\$32.4	11.7%	\$31.2	-3.7%	\$24.1	-22.8%	\$34.0	41.1%
Other Medical Equipment	\$17.8	\$19.6	10.1%	\$18.8	-4.1%	\$14.2	-24.5%	\$19.8	39.4%
Total Medical Equipment	\$78.9	\$87.8	11.3%	\$84.3	-4.0%	\$64.8	-23.1%	\$91.4	41.0%

\$ Millions

Medical Sub-Sector	2022	Percent Change	2023	Percent Change	2024	Percent Change	2025	Percent Change	Five-Year CAGR
Diagnostic & Imaging Equipment	\$40.2	6.9%	\$43.8	9.0%	\$45.8	4.6%	\$50.0	0.0%	13.5%
Therapeutic Equipment	\$36.4	7.1%	\$39.1	7.4%	\$41.4	5.9%	\$44.8	8.6%	13.2%
Other Medical Equipment	\$21.0	6.1%	\$21.6	2.9%	\$22.5	4.2%	\$24.6	7.9%	11.6%
Total Medical Equipment	\$97.6	6.8%	\$104.5	7.1%	\$109.7	5.0%	\$119.4	7.5%	13.0%

\$ Millions

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Japanese Medical Connector Sales by Product Type 2017 through 2025 With Percent Change and Five-Year CAGR

Product Category	2017	2018	Percent Change	2019	Percent Change	2020	Percent Change	2021	Percent Change
PCB	\$XX.X	\$69.6	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Rectangular I/O	\$XX.X	\$19.9	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
IC Sockets	\$XX.X	\$3.8	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
RF Coax	\$XX.X	\$18.2	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Circular	\$XX.X	\$19.4	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Telephone/Telecom	\$XX.X	\$0.3	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Fiber Optic	\$XX.X	\$7.2	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Terminal Blocks	\$XX.X	\$2.0	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Heavy Duty	\$XX.X	\$5.8	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Power/High Voltage	\$XX.X	\$3.3	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Application Specific	\$XX.X	\$15.6	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Other Connectors	\$XX.X	\$2.3	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%
Total	\$XX.X	\$167.4	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%

\$ Millions

Product Category	2022	Percent Change	2023	Percent Change	2024	Percent Change	2025	Percent Change	Five-Year CAGR
PCB	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Rectangular I/O	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
IC Sockets	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
RF Coax	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Circular	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Telephone/Telecom	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Fiber Optic	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Terminal Blocks	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Heavy Duty	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Power/High Voltage	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Application Specific	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Other Connectors	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%
Total	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	\$XX.X	Y.Y%	Y.Y%

\$ Millions

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1209 Fox Glen Drive - St. Charles, IL 60174

Phone: 630.443.2702

E-mail: bishop@bishopinc.com

Website: www.connectorindustry.com

Online Store: <http://store.bishopinc.com/>

For Questions in Europe:

Mr. Arthur Visser

Bishop & Associates, Inc.

Phone: (32) 2.660.3696

[Email Arthur Visser](mailto:arthur.visser@bishopinc.com)

1209 Fox Glen Drive

What's New ?

Bishop & Associates has recently completed several new research reports about the worldwide connector industry. A table of contents for each report can be found at <https://store.bishopinc.com>.

- Report M-1501-20** **Medical Electronics Market for Interconnect Solutions (July 2020) NEW**
- Report P-780-20** **World RF Coax Connector Market 2020 (June 2020) NEW**
- Report C-122-20** **2020 Connector Industry Yearbook (June 2020) NEW**
- Report M-799-20** **2020 World Cable Assembly Market (May 2020) NEW**
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- Report M-960-18** **Electronic Industry and Connector Outlook 2018 and Beyond (November 2018)**

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