

Anesthesia Devices – A Global Market Overview

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Abstracts

Global Anesthesia Devices Market Trends and Outlook

Anesthesia devices are vital tools that initiate and maintain anesthesia throughout surgical procedures or medical interventions while ensuring patient safety and comfort. These devices encompass delivery machines that provide anesthetics and oxygen, monitoring systems that observe vital signs such as heart rate, blood pressure, and oxygen saturation, and disposables like masks and breathing circuits designed to maintain sterilization standards. The Monitored Anesthesia Care (MAC) service offers continuous oversight to enhance patient conditions before procedures and ensure stability during surgery, whereas Anesthesia Information Management Systems (AIMS) facilitate data management and improve procedural safety. Commonly used in fields such as cardiology, orthopedics, and neurology, these devices help identify complications at an early stage, assist in vital management, and mitigate risks. Although they may have potential side effects, including confusion or swelling after procedures, their importance in pain management, anxiety alleviation, and sustaining patient stability during intricate surgeries underscores their critical role.

The global anesthesia devices market is estimated to be valued at US\$17.1 billion in 2024, and is projected to reach US\$27.3 billion by 2030, registering a CAGR of 8.1% from 2024 to 2030. The global anesthesia devices market is driven by the growing number of surgical procedures, particularly in cardiology, neurology, and orthopedics. The rising prevalence of chronic illnesses and age-related conditions in the geriatric population has further fueled demand, as these often require surgical interventions. Additionally, the increase in high-impact injuries from accidents has led to a surge in orthopedic surgeries involving anesthesia. Technological advancements in anesthesia delivery systems, such as real-time monitoring and automated dosing, are enhancing patient safety and operational efficiency. Government initiatives and heightened healthcare investments, especially in emerging regions, are improving access to

modern anesthesia technologies. The aging population and the rising prevalence of cardiovascular diseases (CVDs) are also driving demand for anesthesia during cardiac surgeries, contributing to the overall market expansion.

Anesthesia Devices Regional Market Analysis

North America holds the largest share of the global anesthesia devices market at 40.8% in 2024, attributed to its sophisticated healthcare system, high rates of surgical procedures, and substantial healthcare expenditures. The increasing elderly population in the U.S. and Canada also propels the demand for anesthesia devices, bolstered by advancements such as automated delivery systems and Anesthesia Information Management Systems (AIMS). Conversely, the Asia-Pacific region is experiencing the fastest growth, with a projected CAGR of more than 10% during the forecast period 2024-2030, driven by improvements in healthcare infrastructure, rising surgical numbers, and supportive government initiatives in countries like China and India. Additionally, the growth of disposable incomes and increased healthcare investments are contributing to the expansion of the market in this region.

Anesthesia Devices Market Analysis by Product

The global anesthesia devices market is segmented into anesthesia delivery machines, anesthesia disposables & accessories, anesthesia monitors, and anesthesia information management systems (AIMS). Anesthesia delivery machines dominate the market, accounting for 37.5% of the share in 2024. This dominance is driven by their critical role in delivering anesthetic gases and oxygen during surgical procedures, along with technological advancements enhancing patient safety and operational efficiency. The growing elderly population and increasing number of surgeries further boost their prominence. Meanwhile, the anesthesia monitors segment is projected to record the fastest growth with a CAGR of 9.4% from 2024 to 2030, fueled by innovations such as advanced features for tracking oxygen saturation, pulse rate, and comprehensive patient monitoring systems.

Anesthesia Devices Market Analysis by Application

The global market for anesthesia devices is categorized by application, including orthopedics, cardiology, urology, dental, neurology, ophthalmology, and others. Among these, the orthopedics segment leads the market, representing 22.2% of the share in 2024. This dominance is attributed to the rising incidence of orthopedic conditions, an expanding elderly population, and increased awareness surrounding orthopedic surgical

procedures. On the other hand, cardiology is the most rapidly expanding segment within the anesthesia devices market, with a CAGR of 9.7% from 2024 to 2030. This growth is fueled by the higher prevalence of cardiovascular illnesses, including heart failure and arrhythmias, as well as a growing number of cardiac surgeries, such as coronary artery bypass grafts and valve replacements. Technological advancements, like real-time monitoring and automated dosing systems, enhance the accuracy and safety of anesthesia during intricate cardiology operations.

Anesthesia Devices Market Report Scope

This global report on Anesthesia Devices analyzes the global and regional markets based on product and application for the period 2021-2030 with forecasts from 2024 to 2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 25+

Anesthesia Devices Market by Geographic Region

North America (The United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Italy, Spain, and Rest of Europe)

Asia-Pacific (Japan, China, India, South Korea, and Rest of Asia-Pacific)

Rest of World

Anesthesia Devices Market by Product

Anesthesia Delivery Machines

Anesthesia Disposables & Accessories

Anesthesia Monitors

Anesthesia Information Management Systems (AIMS)

Anesthesia Devices Market by Application

Orthopedics

Cardiology

Urology

Dental

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Other Applications (Including General Surgery, ENT and Others)

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Other Applications (Including General Surgery, ENT and Others)

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3M Company

Ambu A/S

B. Braun Melsungen AG

Baxter International Inc.

Becton, Dickinson and Company

Beijing Aeonmed Co. Ltd.

B L Lifesciences Pvt Ltd

Cardinal Health, Inc.

Drgerwerk AG & Co. KGaA

Fisher & Paykel Healthcare Limited

GE HealthCare

Getinge AB

ICU Medical

Infinium Medical, Inc.

Intersurgical Ltd

Koninklijke Philips N.V.

Leventon S.A.U.

Masimo Corporation
Medtronic plc
Mindray Medical International Limited
Nihon Kohden Corporation
Parker Healthcare Pty Ltd.
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About

Anesthesia Delivery Machines

In its most fundamental format, as depicted in the figure below, an anesthesia machine is utilized by an anesthesiologist for controlling a patient's gas exchange and administering inhalation anesthetics.

However, contemporary anesthesia machines have evolved to become highly complex systems that are incorporated with a host of inbuilt safety features and devices, a breathing circuit, monitors, a mechanical ventilator, and one or multiple microprocessors for improving, integrating and monitoring all components. Monitors that do not form a part of an anesthesia machine are added externally to become fully integrated with the unit. Further, the modular designs of anesthesia machines facilitate an extensive range of optional configurations and features within the same product series, leading to the use of anesthesia workstation as the more prevalent term.

Over the past several years, redesigning of equipment and education have enabled in making significant progress in relation to minimizing the number of adverse outcomes resulting from anesthetic gas delivery equipment. Statistics have revealed that misusing anesthesia gas delivery equipment has a three times greater prevalence compared to equipment malfunction in causing adverse outcomes related to equipment. Equipment misuse can be categorized as errors in preparation, maintenance or deployment of a device, and avoidable anesthetic mishaps are more often than not associated with lacking equipment familiarity and failure in checking machine function.

About 39% of all injuries are attributed to breathing circuits, with a major proportion of the incidents being related to misconnects or disconnects, with a misconnect being defined as "a nonfunctional and unconventional configuration of breathing circuit components or attachments." Other causes were associated with vaporizers (21%), ventilators (17%) and oxygen supply (11%), while only 7% of the instances were accounted for by failure of other more basic components of the anesthesia machine.

Enhanced Features of Anesthesia Equipment Boosts Market Prospects

The specialized field of anesthesiology has been garnering much attention of late in the overall hospital care system. The anesthesia market has been witnessing rapid increases due to mounting safety awareness and advancements in anesthesia machine

technology. Government funding initiatives have resulted in ensuring the gradual transitioning of healthcare facilities and hospitals toward sophisticated equipment. An ever-enhancing demand for cutting-edge anesthesia equipment from surgeons, anesthesiologists and clinicians for operating room procedures has also been instrumental in shaping market dynamics.

Trends in Technology

The existing anesthesia technology scenario is dominated by low-flow anesthesia and electronic medical records (EMRs), which contribute to considerable savings. Though providing economy, efficacy, safety and eco-friendliness in the administration of general anesthesia, possible drawbacks can include accumulation of carbon dioxide (CO₂) and other gases. Integrating EMRs with the perioperative environment enables medical professionals in offering improved patient care, in addition to enhancing financial efficiency. The integration of synchronized data into a patient's EMR should be facilitated by anesthesia equipment in order that clinical documentation, patient safety, regulatory compliance and billing effectiveness are maximized. Clinical data has to be precise for healthcare providers in monitoring level of patient care and keeping track of the quality of patient outcomes. Other features that are being widely incorporated include multi-gas monitoring, oxygen monitoring and anesthesia gas monitoring, with standard flow meters giving way to digital flow meters for greater accuracy. Additional enhancements that would go a long way in expanding market prospects include integration of devices, such as infusion pumps and syringe pumps with the anesthesia workstation.

Total intravenous anesthesia (TIVA) is an anesthetic machine that is highly user-friendly and ideal for patients undergoing small- to medium-sized cosmetic surgery operations. This technology has now become an option of choice for patients because of its unique ability of quickly clearing out of a patient's system, enabling a rapid and effortless awakening with minimal possibility of nausea. In addition, TIVA offers the option of adjustments ranging from light to deep sedation without impairing a patient's airway and breathing, making it specifically ideal for facial surgeries. This technique has been widely applied for outpatient cosmetic surgery procedures, such as breast augmentation, medium-sized facial surgeries, eyelid surgeries, fat transfer, skin peels and liposuctions. Using TIVA also enables in multimodal intra-operative neurophysiologic monitoring in instances of complex spinal surgeries, and can also cater to the distinctive anesthetic demands of pediatric patients.

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