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Medical Ventilators Market - Global Outlook and Forecast 2020-2025

https://marketpublishers.com/r/M4E17B3BD7C6EN.html
Date: April 2020
Pages: 282
Price: US$ 3,500.00 (Single User License)
ID: M4E17B3BD7C6EN

Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Medical Ventilators Market Report

The global medical ventilators market is one of the fastest-growing segments in the medical devices market. Factors such as the prevalence of COPD patients, the outbreak of pandemic COVID-19, the increase in the aging population are likely to boost the ventilators market during the forecast period. Moreover, there is a sudden demand for ventilators due to the eruption of the COVID-19 pandemic, which is likely to push the demand by 10-folds. Europe and North America are braving the onslaught of the virus. The growing number of patients infected with the coronavirus in Spain, Italy, the UK, Germany, the US, China, France, Brazil, Japan, Australia, and India is fueling the demand for ventilators. However, the presence of several risks, including pneumonia and volutrauma is hampering the penetration of the market significantly.

The following factors are likely to contribute to the growth of the medical ventilators market during the forecast period:

Increase in Demand for Homecare Ventilators

Emergence of Multi-Functional Medical Ventilators

Increase in Demand for Portable Ventilators

Exponential Rise in Number of COVID-19 Cases

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The study considers the present scenario of the medical ventilators market and its market dynamics for the period 2019?2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

Medical Ventilators Market: Segmentation

This research report includes a detailed market segmentation by Interface, Mobility, Patient Group, Application, End-user, and Geography. The invasive segment is likely to retain its market dominance during the forecast period. The rise in the COVID-19 pandemic and the growth in respiratory disorders COPD prevalence are expected to drive the segment. The growing shift toward the application of non-invasive ventilators (NIV) is contributing to the growth of the non-invasive segment.

ICUs and emergency care units are the major end-users of standard ventilators. These machines are large, which hamper adoption, however, the segment is likely to dominate the market, especially developed markets. Portable medical ventilators can be used at several point-of-care sites and mobile healthcare units such as ambulances and ambulatory settings. They provide long-term ventilation support for patients that do not require complex critical care ventilators. The segment is expected to observe promising demand due to the outbreak of COVID-19 to treat affected patients, and convenience and compactness.

The adult medical ventilators market segment is anticipated to retain its market dominance during the forecast period due to the exponential increase in the usage of a wide range of invasive and non-invasive ventilators for treating adult COVID-19 patients admitted in ICU and emergency care settings. A high prevalence of respiratory disorders among preterm newborns and infants is boosting the adoption of pediatric and neonatal ventilators across the globe. Governments across the globe have started to procure these machines as a precautionary measure.

In 2019, hospitals accounted for a 66% share in the global medical ventilators market size. They are likely to emerge as the major revenue contributor to the market. The high growth of the segment can be attributed to the increasing number of hospitals adopting ventilators, the growing prevalence of COPD and other respiratory diseases, and the growth in the aging population. The revenue share of the home care segment in developed countries is likely to grow on account of the growth in the elderly population and epidemiology and social changes in the US, Canada, Germany, Spain, and Italy.

The critical care segment accounted for a 55% share in 2019. Intubation, with subsequent mechanical ventilation support, is a common life-saving intervention in critical care settings. The outbreak of the COVID-19 has increased the number of admissions in critical care settings and ICUs. A majority of COVID-19 patients admitted to ICUs require ventilator support. This segment is likely to grow at a faster rate and is likely to retain its dominance in the medical ventilators market size. The market is likely to witness an incremental growth of over $718 million during the forecast period. The emergency care application segment accounted for a share of 25% in the global ventilators market. There is significant overcrowding in emergency care units across the globe due to the COVID-19 epidemic. Patients that are discharged from critical care units are admitted to emergency departments for monitoring and observation. Across the globe, several medical centers have been converted into emergency care settings to treat the patient suffering from the COVID-19.

Market Segmentation by Interface

Invasive

Non-invasive

Market Segmentation by Mobility

Standard

Portable

Market Segmentation by Patient Group

Hospitals

Adults

Pediatrics & Neonates

Market Segmentation by Application

Critical Care

Emergency Care

Home Care

Neonatal Care

Market Segmentation by End-user

Hospitals

Homecare Settings

Emergency Care Providers

Others

Insights by Geography

Europe is leading the global medical ventilators market and the region is expected to grow at the highest CAGR during the forecast period

Currently, European countries are worst hit by the COVID-19 virus. Italy, Germany, Spain have suffered a high number of deaths since the outbreak of the diseases. This has tested the foundation of the healthcare sector with the demand for ventilators touching new heights to stabilize the situation across the region. The demand for ventilators has increased ten-folds across the region. Moreover, long-term home mechanical ventilation (HMV) is increasingly used for patients with chronic respiratory failure (CRF) arising from chronic obstructive pulmonary disease (COPD), restrictive thoracic disease (RTD), and neuromuscular disease (NMD).

Market Segmentation by Geography

Europe

Spain

- Germany
- Italy
- France
- UK

North America

- US
- Canada

APAC

- South Korea
- China
- Japan
- Australia
- India

Latin America

- Brazil
- Mexico

MEA

- Turkey
- South Africa

Iran

Saudi Arabia

Insights by Vendors

The medical ventilators market is fragmented with the presence of several global, regional, and local vendors offering a wide range of medical ventilators. Hamilton Medical, Medtronic, Vyaire Medical, GE Healthcare, SCHILLER, Koninklijke Philips, and Dr?gerwerk are the key medical ventilator manufacturers in the global ventilators market. Although large vendors basically dominate the market, they are witnessing heavy competition from regional and local companies from India, China, Italy, and Germany. Several regional vendors are offering cost-effective ventilators in Europe, APAC, and Middle East & Africa regions.

Key Vendors

Hamilton Medical

Medtronic

Koninklijke Philips

Vyaire Medical

GE Healthcare

ResMed

Dr?gerwerk

SCHILLER

Smith Medical

Other Vendors

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Air Liquide Medical Systems

Avasarala Technologies

ABRONN

AgVa Healthcare

aXcent Medical

Bunnell

Beijing Eternity Electronic Technology

Deluxe Scientific Surgico

Dima Italia

Fritz Stephan

Getinge

Hartwell Medical

HEYER Medical

HILL-ROM

L?wenstein Medical Innovation

Shenzhen Mindray Bio-Medical Electronics

MEK-ICS

Narang Medical

Oceanic Medical

Shenzhen Landwind Industry

Siare Engineering International Group

S.I.E.M

SI Surgical

B. Industries

Skanray Technologies

Tecme Global

TRITON ELECTRONIC SYSTEMS

United Hayek Industries

Key Market Insights

The medical ventilators market offers several key insights and growth opportunities for the period 2019–2025.

Inclusive insights on the latest industry trends, market restraints, and growth opportunities

A detailed analysis of market growth drivers, challenges, and investment opportunities

A complete overview of market segments along with regional prospective

An exhaustive summary of the vendor landscape, competitive analysis, and market strategies

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