

# **Positive Airway Pressure Devices Market - A Global and Regional Analysis: Focus on Product Type, Indication, End User, Epidemiology, Compliance Rate, Discontinuation, and Regional Analysis - Analysis and Forecast, 2021-2030**

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## **Abstracts**

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Market Report Coverage - Positive Airway Pressure Devices

Market Segmentation

Product Type – Continuous Positive Airway Pressure Device (CPAP), Automatic Positive Airway Pressure Device (APAP), Bi-Level Positive Airway Pressure Device (BiPAP)

Indication – Sleep Apnea, Chronic Obstructive Pulmonary Disease (COPD), Others

End User – Sleep Laboratories, Home Care, Others (Hospitals and Clinics, Elderly Care Homes, Nursing Homes, etc.)

Regional Segmentation

North America - U.S. and Canada

Europe - Germany, U.K., France, Italy, Spain, Nordic Countries, and Rest-of-Europe

Asia-Pacific - Japan, China, India, Australia and New Zealand, South Korea, and the Rest-of-Asia-Pacific

Latin America - Brazil, Mexico, Argentina, Colombia, and the Rest-of-Latin America

Middle East and Africa – K.S.A., U.A.E., South Africa, and the Rest-of-Middle East and Africa

### Market Growth Drivers

Rising Number of Startups Driving Innovation

Increasing Prevalence of Obstructive Sleep Apnea

Growing Prevalence of Respiratory Diseases among the Geriatric Population

Growing Prevalence of Chronic Respiratory Diseases across the Globe

### Market Challenges

High Upfront Cost of the Devices

Side-Effects Associated with Long-Term Usage

### Market Opportunities

Development of Smart PAP Devices

Deployment of 3D Scanning to Offer Customized PAP Masks

Development of Accessory-Free PAP Devices

## Key Companies Profiled

3B Medical, Inc, Apex Medical Corporation, BMC Medical Co. Ltd., Breas Medical AB, Compumedics Limited, Drive DeVilbiss Healthcare, Elmaslar Group, Fisher & Paykel Healthcare Corporation Limited, Hebei Topson Medical Technology Co., Ltd., Kare Medical and Analytical Devices Ltd. Co., Koninklijke Philips N.V., L?wenstein Medical Technology GmbH + Co. KG., Narang Medical Limited, ResMed Inc., Somnetics International, Inc.

## How This Report Can Add Value

Assuming that the reader is a manufacturer of positive airway pressure devices, they will be able to do the following:

- Understand their position as compared to some of the key players in the market

- Get information on parameters such as device adoption rate, therapy compliance rate, and discontinuation rate

- Assess the disease epidemiology in each region

- Familiarize themselves with the necessary information related to changing market dynamics

- Stay updated with the latest trends in the market with respect to connected devices

- Understand the impact of COVID-19 on the market

- Identify some of the key players in the market and understand their value contribution

## Key Questions Answered in the Global Positive Airway Pressure Devices Market Report:

- How has COVID-19 impacted the adoption of PAP devices in the market?

- What are the key regulations which influence the adoption of PAP devices in the

market?

What are some of the key companies in the global and regional PAP market?

What are some of the key factors influencing the growth in adopting PAP devices across the globe?

What are some of the growth opportunities which market players can capitalize on?

What is the PAP device adoption rate for patients diagnosed with sleep apnea?

What are the compliance and discontinuation rates for PAP therapy across regions?

What are the fastest-growing countries in terms of PAP devices adoption?

Which are the key diseases driving the adoption of PAP devices across the world?

What are the key strategies being adopted by market players in the global positive airway pressure devices market?

Who are the most common end-users of PAP devices, and how are the end-use segment expected to grow in the future?

## Positive Airway Pressure Devices Market Industry Overview

A positive airway pressure delivery system is a prescription non-invasive ventilatory device that delivers expiratory positive airway pressure for patients suffering from obstructive sleep apnea. The system also provides positive airway pressure during incipient apnea. The system may include a dedicated flow generator and a patient interface.

Sleep apnea is a sleep-related breathing disorder that involves a decrease or complete halt in airflow despite an ongoing effort to breathe. It occurs when the muscles relax during sleep, causing the soft tissue at the back of the throat to collapse and block the upper airway. Obstructive sleep apnea is also one of the independent risk factors for

stroke, cardiovascular diseases, and systemic hypertension, among other clinical consequences. Globally, sleep apnea impacts more than 936 million individuals worldwide. The American Academy of Sleep Medicine (AASM) recommends that continuous positive airway pressure (CPAP) devices be considered first-line treatment for moderate and severe OSA.

Despite the recommendations, CPAP devices and PAP devices in general frequently encounter challenges in terms of adherence. There are a number of factors that contribute to the low adherence rates for PAP devices. These factors primarily include claustrophobia, discomfort, and high cost. Several studies have been conducted to identify the reason behind low adherence rates despite several changes in the device and mask dynamics.

The global positive airway pressure devices market report highlights that the market was valued at \$3,411.5 million in 2020 and is expected to reach \$6,218.5 million by the end of 2030. The market is expected to grow at a CAGR of 6.03% during the forecast period from 2021 to 2030.

### Global Positive Airway Pressure Devices Market Drivers

Currently, the market is mainly being driven by the growing prevalence of obstructive sleep apnea and chronic respiratory diseases. Some countries have registered increasing awareness of the benefits of positive airway pressure (PAP) therapy, and as a result, there has been a hike in the prevalence of PAP therapy in those countries in the past few years.

There has been a steady growth in the number of health-tech startups in the industry. The market entry of new players has been further accelerated by the COVID-19 pandemic. MedTech startups have been responding to the growing demand for ventilators by offering non-invasive unconventional systems and indigenous ventilators. Apart from that, globally, the prevalence of obstructive sleep apnea is expected to exceed 986 million cases by the end of 2026. According to data obtained from the Global Data Health Exchange and BIS Research analysis, the incidence of the condition in North America was as high as 1 in 11 individuals in 2020. The life expectancy in most countries has surged tremendously. The improvement in life expectancy is due to significant advancements in diagnostic technology and medical science. Furthermore, growing awareness regarding health, nutrition, and hygiene has also resulted in increased life expectancy.

The prevalence of diseases among the growing geriatric population has grown at a significant pace during 2015-2019 as compared to those aged 54 and below.

### Global Positive Airway Pressure Devices Market Challenges

The primary challenge is the lack of awareness of the benefits of positive airway pressure therapy among individuals. Sleep apnea itself faces a significant challenge in getting diagnosed with many individuals unaware that they suffer from the condition. A key restraining factor to the growth in the adoption of PAP devices is their high cost. Additionally, the lack of reimbursement policies by the government and commercial payors also hampers the adoption of PAP devices in emerging economies. These devices are also uncomfortable for many users, which results in the discontinuation of therapy. The global positive airway pressure devices market is also expected to be restrained due to non-adherence.

### Global Positive Airway Pressure Devices Market Opportunities

Owing to the rising focus on remote patient monitoring, mobile health applications, and integration of telemedicine in treatment and diagnostic aspects of healthcare, the development of smart PAP devices offers a novel opportunity to both established and emerging players.

Established PAP device manufacturers can develop devices integrated with a mobile application that would enable patients to monitor their breathing quality, sleep quality, and therapy adherence. Moreover, the mobile application could further facilitate data sharing with a physician for patient monitoring. For instance, Koninklijke Philips N.V. developed DreamMapper, a mobile application compatible with its CPAP devices. The mobile application offers various features such as therapy hours, educational information, progress monitoring, and data sharing with physicians.

### Impact of COVID-19 on the Positive Airway Pressure Devices Industry

The impact of COVID-19 varies depending on the region, country, the extent of lockdowns, and the perception of the local population.

The market witnessed a temporary boost in demand when CPAP devices were approved for emergency use by regulatory bodies to bridge the gap between demand for and supply of ventilators.

Key areas of the supply chain were impacted during the initial days of the pandemic, which comprised coinciding lockdowns in several countries leading to a restriction in global logistics. The resulting strain led to reduced stock in warehouses and a hike in logistics costs locally.

## Market Segmentation

### Global Positive Airway Pressure Devices Market (by Product Type)

CPAPs are considered the gold standard for the treatment of sleep apnea.

The growth in the adoption of CPAP devices across various segments can be attributed to the rise in the prevalence of breathing difficulties, which has led to more doctors prescribing such devices. The history of CPAP therapy can be traced back to the 1950s with the commencement of early sleep studies. The major challenge associated with recording data in that era was the lack of any digital means to implement CPAP. The use of APAP is mostly restricted to those with moderate-to-severe obstructive sleep apnea (OSA). The main barriers to the adoption of APAP devices in the market include low diagnosis rates for those suffering from OSA. APAP devices are also priced higher than CPAP devices which are considered the gold standard therapy for OSA.

BiPAP devices have two pressure settings – inhalation PAP and exhalation PAP. Depending on the settings of the device, the switch between inhalation and exhalation can be timed or automatically based on the individual's breathing patterns. In some cases, BiPAP devices are considered a better option for some individuals. BiPAPs are priced much higher than CPAP and APAP devices and face low adoption rates.

### Global Positive Airway Pressure Devices Market (by Indication)

Sleep apnea is the dominant indication for which positive airway pressure therapy is recommended. Sleep apnea remains undiagnosed among a significant chunk of the individuals who have it. There are several more filters which lead to low adoption rates of positive airway pressure devices.

### Global Positive Airway Pressure Devices Market (by End User)

Traditionally, sleep studies were usually conducted at sleep laboratories to monitor physiological data such as heart rate, breathing, and oxygen levels to diagnose sleeping disorders. However, owing to apprehensions regarding COVID-19 transmission, the

pandemic witnessed a decline in the instances of studies conducted at these centers. The demand created by sleep laboratories is expected to return to normal post the pandemic as patients suffering from severe OSA requiring in-clinic monitoring continue to visit sleep laboratories.

### Global Positive Airway Pressure Devices Market (by Region)

The different regions covered under the global positive airway pressure devices market include North America, Europe, Asia-Pacific, Latin America, and Middle East and Africa.

North America and Europe are two of the largest markets for positive airway pressure devices, while developing countries are expected to register strong growth in the adoption of positive airway pressure devices in the near future.

### Key Market Players and Competition Synopsis

Some of the key players operating in the market include 3B Medical, Inc, Apex Medical Corporation, BMC Medical Co. Ltd., Breas Medical AB, Compumedics Limited, Drive DeVilbiss Healthcare, Elmaslar Group, Fisher & Paykel Healthcare Corporation Limited, Hebei Topson Medical Technology Co., Ltd., Kare Medical and Analytical Devices Ltd. Co., Koninklijke Philips N.V., L?wenstein Medical Technology GmbH + Co. KG., Narang Medical Limited, ResMed Inc., and Somnetics International, Inc.



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