

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

<https://marketpublishers.com/r/P4303F16A470EN.html>

Date: November 2021

Pages: 221

Price: US\$ 5,250.00 (Single User License)

ID: P4303F16A470EN

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.

Contents

1 PRODUCT DEFINITION

2 SCOPE OF RESEARCH

- 2.1 Scope of Study
- 2.2 Inclusion and Exclusion Criteria
- 2.3 Key Questions Answered in the Report

3 RESEARCH METHODOLOGY

- 3.1 Data Collection and Analysis
- 3.2 Data Sources
 - 3.2.1 Primary Data Sources
 - 3.2.2 Secondary Data Sources
- 3.3 Data Triangulation
- 3.4 Market Estimation
- 3.5 Forecast Period Selection Criteria
- 3.6 Assumptions and Limitations

4 EPIDEMIOLOGICAL AND REIMBURSEMENT LANDSCAPE FOR PAP DEVICES

- 4.1 Epidemiological Landscape
 - 4.1.1 Obstructive Sleep Apnea (OSA)
 - 4.1.1.1 Regional Analysis for PAP Devices
 - 4.1.2 Chronic Obstructive Pulmonary Disorder (COPD)
 - 4.1.2.1 Regional Analysis for PAP Devices
 - 4.1.3 COVID-19
 - 4.1.3.1 Regional Analysis for PAP Devices
 - 4.1.4 Other Respiratory Disorders
- 4.2 Reimbursement Landscape
 - 4.2.1 North America
 - 4.2.2 Europe
 - 4.2.3 Asia-Pacific

5 IMPACT OF COVID-19 ON GLOBAL POSITIVE AIRWAY PRESSURE (PAP) DEVICES MARKET

- 5.1 Impact on Regulatory Authorities
- 5.2 Impact on Adoption of Positive Airway Pressure Devices
- 5.3 Impact on Market Size of Positive Airway Pressure Devices
 - 5.3.1 Scenario Comparison Analysis
 - 5.3.2 Regional Impact
- 5.4 Future Impact of COVID-19
 - 5.4.1 Short-Term Impact (2-4 Years)
 - 5.4.2 Mid-Term Impact (5-10 Years)
 - 5.4.3 Long-Term Impact (8-12 Years)
- 5.5 Entry Barriers and Opportunities for New Companies

6 INDUSTRY ANALYSIS

- 6.1 Industry Structure
- 6.2 Key Technological Trends
 - 6.2.1 Short-Term Potential (2-4 Years)
 - 6.2.2 Mid-Term Potential (4-8 Years)
 - 6.2.3 Long Term Potential (8-12 Years)
- 6.3 Value Chain/Supply Chain Analysis
- 6.4 Regulatory Framework
 - 6.4.1 Regulations in North America
 - 6.4.1.1 Food and Drug Administration (FDA)
 - 6.4.1.2 Health Canada
 - 6.4.2 Regulations in Europe
 - 6.4.3 Regulations in Asia-Pacific
 - 6.4.3.1 National Medical Products Administration (NMPA)
 - 6.4.3.2 Pharmaceutical and Medical Device Agency (PMDA)
- 6.5 Patent Analysis
 - 6.5.1 Awaited Technological Developments
 - 6.5.2 Patent Trend (by Year)
 - 6.5.3 Patent Trend (by Country/Cluster)

7 COMPETITIVE LANDSCAPE

- 7.1 Market Share Analysis
- 7.2 Key Developments and Strategies
 - 7.2.1 New Offerings
 - 7.2.2 Partnerships, Alliances, and Business Expansions
 - 7.2.3 Regulatory and Legal Activities

- 7.2.4 Mergers and Acquisitions
- 7.3 Business Model Analysis
- 7.4 Pricing Analysis

8 GLOBAL POSITIVE AIRWAY PRESSURE (PAP) DEVICES MARKET

- 8.1 Assumptions and Limitations
- 8.2 Key Findings and Opportunity Assessment
- 8.3 Global Positive Airway Pressure Devices Market Growth Scenario
 - 8.3.1 Realistic Growth
 - 8.3.2 Optimistic Growth
 - 8.3.3 Pessimistic/Conservative Growth
- 8.4 Market Dynamics
 - 8.4.1 Impact Analysis
 - 8.4.2 Growth Promoting Factors
 - 8.4.2.1 Rising Number of Startups Driving Innovation
 - 8.4.2.2 Increasing Prevalence of Obstructive Sleep Apnea
 - 8.4.2.3 Growing Prevalence of Respiratory Diseases among the Geriatric Population
 - 8.4.2.4 Growing Prevalence of Chronic Respiratory Diseases across the Globe
 - 8.4.3 Growth Inhibiting Factors
 - 8.4.3.1 High Upfront Cost of the Devices
 - 8.4.3.2 Side-Effects Associated with Long-Term Usage
 - 8.4.4 Growth Opportunities
 - 8.4.4.1 Development of Smart PAP Devices
 - 8.4.4.2 Deployment of 3D Scanning to Offer Customized PAP Masks
 - 8.4.4.3 Development of Accessory-Free PAP Devices
 - 8.4.4.3.1 Regional Analysis of Growth Opportunities

9 GLOBAL POSITIVE AIRWAY PRESSURE DEVICES MARKET (BY PRODUCT TYPE)

- 9.1 Opportunity Assessment
- 9.2 Growth-Share Matrix
- 9.3 Continuous Positive Airway Pressure Device (CPAP)
- 9.4 Automatic Positive Airway Pressure Device (APAP)
- 9.5 Bi-Level Positive Airway Pressure Device (BiPAP)

10 GLOBAL POSITIVE AIRWAY PRESSURE DEVICES MARKET (BY INDICATION)

- 10.1 Opportunity Assessment
- 10.2 Growth-Share Matrix
- 10.3 Sleep Apnea
- 10.4 Chronic Obstructive Pulmonary Disease (COPD)
- 10.5 Others

11 GLOBAL POSITIVE AIRWAY PRESSURE DEVICES MARKET (BY END USER)

- 11.1 Opportunity Assessment
- 11.2 Growth-Share Matrix
- 11.3 Sleep Laboratories
- 11.4 Home Care
- 11.5 Others (Hospitals and Clinics, Elderly Care Homes, Nursing Homes, etc.)

12 GLOBAL POSITIVE AIRWAY PRESSURE DEVICES MARKET (BY REGION)

- 12.1 Overview
- 12.2 North America Positive Airway Pressure Devices Market
 - 12.2.1 Key Findings
 - 12.2.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate
 - 12.2.1.2 PAP Therapy Compliance Rate
 - 12.2.1.3 PAP Therapy Discontinuation Rate
 - 12.2.1.4 Fees Associated with PAP Therapy
 - 12.2.2 Market Size and Forecast
 - 12.2.3 North America Positive Airway Pressure Devices Market (by Product Type)
 - 12.2.4 North America Positive Airway Pressure Devices Market (by Indication)
 - 12.2.5 North America Positive Airway Pressure Devices Market (by End User)
 - 12.2.6 North America Positive Airway Pressure Devices Market Share Analysis (by Country), 2019 and 2030
 - 12.2.6.1 U.S.
 - 12.2.6.1.1 Key Findings
 - 12.2.6.1.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate
 - 12.2.6.1.1.2 PAP Therapy Compliance Rate
 - 12.2.6.1.1.3 PAP Therapy Discontinuation Rate
 - 12.2.6.1.1.4 Fees Associated with PAP Therapy
 - 12.2.6.1.2 Market Dynamics
 - 12.2.6.1.3 Market Size and Forecast
 - 12.2.6.2 Canada
 - 12.2.6.2.1 Market Dynamics

12.2.6.2.2 Market Size and Forecast

12.3 Europe Positive Airway Pressure Devices Market

12.3.1 Key Findings

12.3.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate

12.3.1.2 PAP Therapy Compliance Rate

12.3.1.3 PAP Therapy Discontinuation Rate

12.3.1.4 Fees Associated with PAP Therapy

12.3.2 Market Size and Forecast

12.3.3 Europe Positive Airway Pressure Devices Market (by Product Type)

12.3.4 Europe Positive Airway Pressure Devices Market (by Indication), \$Million, 2019-2030

12.3.5 Europe Positive Airway Pressure Devices Market (by End User)

12.3.6 Europe Positive Airway Pressure Devices Market (by Country)

12.3.6.1 Germany

12.3.6.1.1 Key Findings

12.3.6.1.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate

12.3.6.1.1.2 PAP Therapy Compliance Rate

12.3.6.1.1.3 PAP Therapy Discontinuation Rate

12.3.6.1.1.4 Fees Associated with PAP Therapy

12.3.6.1.2 Market Dynamics

12.3.6.1.3 Market Size and Forecast

12.3.6.2 U.K.

12.3.6.2.1 Key Findings

12.3.6.2.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate

12.3.6.2.1.2 PAP Therapy Compliance Rate

12.3.6.2.1.3 PAP Therapy Discontinuation Rate

12.3.6.2.1.4 Fees Associated with PAP Therapy

12.3.6.2.2 Market Dynamics

12.3.6.2.3 Market Size and Forecast

12.3.6.3 France

12.3.6.3.1 Key Findings

12.3.6.3.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate

12.3.6.3.1.2 PAP Therapy Compliance Rate

12.3.6.3.1.3 PAP Therapy Discontinuation Rate

12.3.6.3.1.4 Fees Associated with PAP Therapy

12.3.6.3.2 Market Dynamics

12.3.6.3.3 Market Size and Forecast

12.3.6.4 Italy

12.3.6.4.1 Key Findings

- 12.3.6.4.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate
- 12.3.6.4.1.2 PAP Therapy Compliance Rate
- 12.3.6.4.1.3 PAP Therapy Discontinuation Rate
- 12.3.6.4.1.4 Fees Associated with PAP Therapy
- 12.3.6.4.2 Market Dynamics
- 12.3.6.4.3 Market Size and Forecast
- 12.3.6.5 Spain
 - 12.3.6.5.1 Key Findings
 - 12.3.6.5.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate
 - 12.3.6.5.1.2 PAP Therapy Compliance Rate
 - 12.3.6.5.1.3 PAP Therapy Discontinuation Rate
 - 12.3.6.5.1.4 Fees Associated with PAP Therapy
 - 12.3.6.5.2 Market Dynamics
 - 12.3.6.5.3 Market Size and Forecast
- 12.3.6.6 Nordic Countries
 - 12.3.6.6.1 Market Dynamics
 - 12.3.6.6.2 Market Size and Forecast
- 12.3.6.7 Rest-of-Europe
 - 12.3.6.7.1 Market Dynamics
 - 12.3.6.7.2 Market Size and Forecast
- 12.4 Asia-Pacific Positive Airway Pressure Devices Market
 - 12.4.1 Key Findings
 - 12.4.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate
 - 12.4.1.2 PAP Therapy Compliance Rate
 - 12.4.1.3 PAP Therapy Discontinuation Rate
 - 12.4.1.4 Fees Associated with PAP Therapy
 - 12.4.2 Market Size and Forecast
 - 12.4.3 Asia-Pacific Positive Airway Pressure Devices Market (by Product Type)
 - 12.4.4 Asia-Pacific Positive Airway Pressure Devices Market (by Indication)
 - 12.4.5 Asia-Pacific Positive Airway Pressure Devices Market (by End User)
 - 12.4.6 Asia-Pacific Positive Airway Pressure Devices Market (by Country)
 - 12.4.6.1 Japan
 - 12.4.6.1.1 Market Dynamics
 - 12.4.6.1.2 Market Size and Forecast
 - 12.4.6.2 China
 - 12.4.6.2.1 Market Dynamics
 - 12.4.6.2.2 Market Size and Forecast
 - 12.4.6.3 India
 - 12.4.6.3.1 Market Dynamics

- 12.4.6.3.2 Market Size and Forecast
- 12.4.6.4 Australia and New Zealand
 - 12.4.6.4.1 Market Dynamics
 - 12.4.6.4.2 Market Size and Forecast
- 12.4.6.5 South Korea
 - 12.4.6.5.1 Market Dynamics
 - 12.4.6.5.2 Market Size and Forecast
- 12.4.6.6 Rest-of-Asia-Pacific
 - 12.4.6.6.1 Market Dynamics
 - 12.4.6.6.2 Market Size and Forecast
- 12.5 Latin America Positive Airway Pressure Devices Market
 - 12.5.1 Key Findings
 - 12.5.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate
 - 12.5.1.2 PAP Therapy Compliance Rate
 - 12.5.1.3 PAP Therapy Discontinuation Rate
 - 12.5.1.4 Fees Associated with PAP Therapy
 - 12.5.2 Market Size and Forecast
 - 12.5.3 Latin America Positive Airway Pressure Devices Market (by Product Type)
 - 12.5.4 Latin America Positive Airway Pressure Devices Market (by Indication)
 - 12.5.5 Latin America Positive Airway Pressure Devices Market (by End User)
 - 12.5.6 Latin America Positive Airway Pressure Devices Market Share Analysis (by Country)
 - 12.5.6.1 Brazil
 - 12.5.6.1.1 Market Dynamics
 - 12.5.6.1.2 Market Size and Forecast
 - 12.5.6.2 Mexico
 - 12.5.6.2.1 Market Dynamics
 - 12.5.6.2.2 Market Size and Forecast
 - 12.5.6.3 Argentina
 - 12.5.6.3.1 Market Dynamics
 - 12.5.6.3.2 Market Size and Forecast
 - 12.5.6.4 Colombia
 - 12.5.6.4.1 Market Dynamics
 - 12.5.6.4.2 Market Size and Forecast
 - 12.5.6.5 Rest-of-Latin America
 - 12.5.6.5.1 Market Dynamics
 - 12.5.6.5.2 Market Size and Forecast
- 12.6 Middle East and Africa Positive Airway Pressure Devices Market
 - 12.6.1 Key Findings

- 12.6.1.1 Diagnosed Sleep Apnea Patients PAP Device Adoption Rate
- 12.6.1.2 PAP Therapy Compliance Rate
- 12.6.1.3 PAP Therapy Discontinuation Rate
- 12.6.1.4 Fees Associated with PAP Therapy
- 12.6.2 Market Size and Forecast
- 12.6.3 Middle East and Africa Positive Airway Pressure Devices Market (by Product Type)
- 12.6.4 Middle East and Africa Positive Airway Pressure Devices Market (by Indication)
- 12.6.5 Middle East and Africa Positive Airway Pressure Devices Market (by End User)
- 12.6.6 Middle East and Africa Positive Airway Pressure Devices Market Share Analysis (by Country)
 - 12.6.6.1 K.S.A.
 - 12.6.6.1.1 Market Dynamics
 - 12.6.6.1.2 Market Size and Forecast
 - 12.6.6.2 U.A.E.
 - 12.6.6.2.1 Market Dynamics
 - 12.6.6.2.2 Market Size and Forecast
 - 12.6.6.3 South Africa
 - 12.6.6.3.1 Market Dynamics
 - 12.6.6.3.2 Market Size and Forecast
 - 12.6.6.4 Rest-of-Middle East and Africa
 - 12.6.6.4.1 Market Dynamics
 - 12.6.6.4.2 Market Size and Forecast

13 COMPANY PROFILES

- 13.1 3B Medical, Inc
 - 13.1.1 Company Overview
 - 13.1.2 Role of 3B Medical, Inc in the Global Positive Airway Pressure Devices Market
 - 13.1.3 Product Portfolio
 - 13.1.4 Recent Developments
 - 13.1.5 SWOT Analysis
- 13.2 Apex Medical Corporation
 - 13.2.1 Company Overview
 - 13.2.2 Role of Apex Medical Corporation in the Global Positive Airway Pressure Devices Market
 - 13.2.3 Product Portfolio
 - 13.2.4 Recent Developments
 - 13.2.5 SWOT Analysis

13.3 BMC Medical Co. Ltd.

13.3.1 Company Overview

13.3.2 Role of BMC Medical Co. Ltd. in the Global Positive Airway Pressure Devices Market

13.3.3 Product Portfolio

13.3.4 Recent Developments

13.3.5 SWOT Analysis

13.4 Breas Medical AB

13.4.1 Company Overview

13.4.2 Role of Breas Medical AB in the Global Positive Airway Pressure Devices Market

13.4.3 Product Portfolio

13.4.4 Recent Developments

13.4.5 SWOT Analysis

13.5 Compumedics Limited

13.5.1 Company Overview

13.5.2 Role of Compumedics Limited in the Global Positive Airway Pressure Devices Market

13.5.3 Product Portfolio

13.5.4 Financials

13.5.5 Research and Development Insights

13.5.6 SWOT Analysis

13.6 Drive DeVilbiss Healthcare

13.6.1 Company Overview

13.6.2 Role of Drive DeVilbiss Healthcare in the Global Positive Airway Pressure Devices Market

13.6.3 Product Portfolio

13.6.4 Recent Developments

13.6.5 SWOT Analysis

13.7 Elmaslar Group

13.7.1 Company Overview

13.7.2 Role of Elmaslar Group in the Global Positive Airway Pressure Devices Market

13.7.3 Product Portfolio

13.7.4 SWOT Analysis

13.8 Fisher & Paykel Healthcare Corporation Limited

13.8.1 Company Overview

13.8.2 Role of Fisher & Paykel Healthcare Corporation Limited in the Global Positive Airway Pressure Devices Market

13.8.3 Product Portfolio

- 13.8.4 Financials
- 13.8.5 Research and Development Insights
- 13.8.6 SWOT Analysis
- 13.9 Hebei Topson Medical Technology Co., Ltd.
 - 13.9.1 Company Overview
 - 13.9.2 Role of Hebei Topson Medical Technology Co., Ltd. in the Global Positive Airway Pressure Devices Market
 - 13.9.3 Product Portfolio
 - 13.9.4 SWOT Analysis
- 13.1 Kare Medical and Analytical Devices Ltd. Co.
 - 13.10.1 Company Overview
 - 13.10.2 Role of Kare Medical and Analytical Devices Ltd. Co. in the Global Positive Airway Pressure Devices Market
 - 13.10.3 Product Portfolio
 - 13.10.4 SWOT Analysis
- 13.11 Koninklijke Philips N.V.
 - 13.11.1 Company Overview
 - 13.11.2 Role of Koninklijke Philips N.V. in the Global Positive Airway Pressure Devices Market
 - 13.11.3 Product Portfolio
 - 13.11.4 Financials
 - 13.11.5 Recent Developments
 - 13.11.6 SWOT Analysis
- 13.12 L?wenstein Medical Technology GmbH + Co. KG.
 - 13.12.1 Company Overview
 - 13.12.2 Role of L?wenstein Medical Technology GmbH + Co. KG. in the Global Positive Airway Pressure Devices Market
 - 13.12.3 Product Portfolio
 - 13.12.4 SWOT Analysis
- 13.13 Narang Medical Limited
 - 13.13.1 Company Overview
 - 13.13.2 Role of Narang Medical Limited in the Global Positive Airway Pressure Devices Market
 - 13.13.3 Product Portfolio
 - 13.13.4 SWOT Analysis
- 13.14 ResMed Inc.
 - 13.14.1 Company Overview
 - 13.14.2 Role of ResMed Inc. in the Global Positive Airway Pressure Devices Market
 - 13.14.3 Product Portfolio

13.14.4 Recent Developments

13.14.5 Financials

13.14.6 Research and Development Insights

13.14.7 SWOT Analysis

13.15 Somnetics International, Inc.

13.15.1 Company Overview

13.15.2 Role of Somnetics International, Inc. in the Global Positive Airway Pressure

Devices Market

13.15.3 Product Portfolio

13.15.4 Recent Developments

13.15.5 SWOT Analysis

List Of Figures

LIST OF FIGURES

Figure 1: Global Positive Airway Pressure Devices Market Dynamics Impact Analysis

Figure 2: Philips Recall: Primary Verbatim

Figure 3: Potential COVID-19 Future Scenarios of Global Positive Airway Pressure Devices Market

Figure 4: Global Positive Airway Pressure Devices Market Growth-Share Matrix, 2020-2030

Figure 5: Global Positive Airway Pressure Devices Market Segmentation

Figure 6: Global Positive Airway Pressure Devices Market, Research Methodology

Figure 7: Primary Research

Figure 8: Secondary Research

Figure 9: Data Triangulation

Figure 10: Global Positive Airway Pressure Devices Market Research Process

Figure 11: Assumptions and Limitations

Figure 12: Global Prevalence and Incidence (Obstructive Sleep Apnea), 2015-2026

Figure 13: Global Prevalence and Incidence (Chronic Obstructive Pulmonary Disorder), 2015-2026

Figure 14: Global Prevalence and Incidence (COVID-19), January 22, 2020-January 01, 2021

Figure 15: Asthma Incidence Y-o-Y Analysis (by Region), 1991-2026

Figure 16: Asthma Prevalence Y-o-Y Analysis (by Region), 1991-2026

Figure 17: Pneumoconiosis Incidence Y-o-Y Analysis (by Region), 1991-2026

Figure 18: Pneumoconiosis Prevalence Y-o-Y Analysis (by Region), 1991-2026

Figure 19: Upper Respiratory Tract Infections Incidence Y-o-Y Analysis (by Region), 1991-2026

Figure 20: Upper Respiratory Tract Infections Prevalence Y-o-Y Analysis (by Region), 1991-2026

Figure 21: Lower Respiratory Tract Infections Incidence Y-o-Y Analysis (by Region), 1991-2026

Figure 22: Lower Respiratory Tract Infections Prevalence Y-o-Y Analysis (by Region), 1991-2026

Figure 23: COVID-19 Scenario Comparison Analysis on Positive Airway Pressure Devices Market

Figure 24: Global Positive Airway Pressure Devices Market Industry Structure

Figure 25: Global Positive Airway Pressure Devices Market, Key Trends

Figure 26: Global Positive Airway Pressure Devices Market Key Trends, Short-Term

Impact Analysis, 2023-2025

Figure 27: Global Positive Airway Pressure Devices Market, Key Trends, Mid-Term Impact Analysis, 2025-2029

Figure 28: Global Positive Airway Pressure Devices Market Key Trends, Long-Term Impact Analysis, 2029-2033

Figure 29: Global Positive Airway Pressure Devices Market Supply Chain Analysis

Figure 30: Global Positive Airway Pressure Devices Market: Regulatory Landscape

Figure 31: EU Regulatory Pathway for Medical Device

Figure 32: NMPA Regulatory Pathway for Medical Device

Figure 33: PMDA Regulatory Pathway for Medical Device

Figure 34: Global Positive Airway Pressure Devices Market: Patent Publishing Trend (by Year)

Figure 35: Global Positive Airway Pressure Devices Market: Patent Publishing Trend (by Country/Cluster)

Figure 36: Global Positive Airway Pressure Therapy Market, Company Revenue Share Analysis, \$Million, 2020

Figure 37: Share of Key Developments and Strategies in the Global Positive Airway Pressure Devices Market (by Category), January 2018-October 2021

Figure 38: Global Positive Airway Pressure Devices Market Key Developments (by Year), January 2018-October 2021

Figure 39: Global Positive Airway Pressure Devices Market New Offerings (by Company), January 2018-October 2021

Figure 40: Global Positive Airway Pressure Devices Market Partnerships, Alliances, and Business Expansions (by Company), January 2018-October 2021

Figure 41: Global Positive Airway Pressure Devices Market Regulatory and Legal Activities (by Company), January 2018-October 2021

Figure 42: Global Positive Airway Pressure Devices Market Mergers and Acquisitions (by Company), January 2018-October 2021

Figure 43: Global Positive Airway Pressure Devices Market Incremental Opportunity, \$Million, 2020-2030

Figure 44: Global Positive Airway Pressure Devices Market, Potential Forecast Scenarios

Figure 45: Global Positive Airway Pressure Devices Market Size and Growth Potential (Realistic Scenario), \$Million, 2019-2030

Figure 46: Global Positive Airway Pressure Devices Market Size and Growth Potential (Optimistic Scenario), \$Million, 2019-2030

Figure 47: Global Positive Airway Pressure Devices Market Size and Growth Potential (Pessimistic Scenario), \$Million, 2019-2030

Figure 48: Global Positive Airway Pressure Devices Market Dynamics Impact Analysis

Figure 49: Global Prevalence (Obstructive Sleep Apnea), 2015-2026

Figure 50: Global Positive Airway Pressure Devices Market (by Product Type)

Figure 51: Global Positive Airway Pressure Devices Market Incremental Opportunity (by Product Type), \$Million, 2020-2030

Figure 52: Global Positive Airway Pressure Devices Market Growth-Share Matrix (by Product Type), 2020-2030

Figure 53: Global Positive Airway Pressure Devices Market (CPAP), \$Million, 2019-2030

Figure 54: Global Positive Airway Pressure Devices Market (APAP), \$Million, 2019-2030

Figure 55: Global Positive Airway Pressure Devices Market (BiPAP), \$Million, 2019-2030

Figure 56: Global Positive Airway Pressure Devices Market (by Indication)

Figure 57: Global Positive Airway Pressure Devices Market Incremental Opportunity (by Indication), \$Million, 2020-2030

Figure 58: Global Positive Airway Pressure Devices Market Growth-Share Matrix (by Indication), 2020-2030

Figure 59: Global Positive Airway Pressure Devices Market (Sleep Apnea), \$Million, 2019-2030

Figure 60: Global Positive Airway Pressure Devices Market (COPD), \$Million, 2019-2030

Figure 61: Global Positive Airway Pressure Devices Market (Others), \$Million, 2019-2030

Figure 62: Global Positive Airway Pressure Devices Market (by End User)

Figure 63: Global Positive Airway Pressure Devices Market Incremental Opportunity (by End User), \$Million, 2020-2030

Figure 64: Global Positive Airway Pressure Devices Market Growth-Share Matrix (by End User), 2020-2030

Figure 65: Global Positive Airway Pressure Devices Market (Sleep Laboratories), \$Million, 2019-2030

Figure 66: Global Positive Airway Pressure Devices Market (Home Care), \$Million, 2019-2030

Figure 67: Global Positive Airway Pressure Devices Market (Others), \$Million, 2019-2030

Figure 68: Global Positive Airway Pressure Devices Market (by Region), \$Million, 2019-2030

Figure 69: North America Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 70: North America Positive Airway Pressure Devices Market (by Product Type), \$Million, 2019-2030

Figure 71: North America Positive Airway Pressure Devices Market (by Indication), \$Million, 2019-2030

Figure 72: North America Positive Airway Pressure Devices Market (by End User), \$Million 2019-2030

Figure 73: North America Positive Airway Pressure Devices Market (by Country), \$Million 2019 and 2030

Figure 74: U.S. Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 75: Canada Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 76: Europe Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 77: Europe Positive Airway Pressure Devices Market (by Product Type), \$Million, 2019-2030

Figure 78: Europe Positive Airway Pressure Devices Market (by Indication), \$Million, 2019-2030

Figure 79: Europe Positive Airway Pressure Devices Market (by End User), \$Million, 2019-2030

Figure 80: Europe Positive Airway Pressure Devices Market Share Analysis (by Country), \$Million, 2019 and 2030

Figure 81: Germany Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 82: U.K. Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 83: France Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 84: Italy Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 85: Spain Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 86: Nordic Countries Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 87: Rest-of-Europe Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 88: Asia-Pacific Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 89: Asia-Pacific Positive Airway Pressure Devices Market (by Product Type), \$Million, 2019-2030

Figure 90: Asia-Pacific Positive Airway Pressure Devices Market (by Indication), \$Million, 2019-2030

Figure 91: Asia-Pacific Positive Airway Pressure Devices Market (by End User), \$Million, 2019-2030

Figure 92: Asia-Pacific Positive Airway Pressure Devices Market Share Analysis (by Country), \$Million, 2019 and 2030

Figure 93: Japan Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 94: China Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 95: India Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 96: Australia and New Zealand Positive Airway Pressure Devices Market,

\$Million, 2019-2030

Figure 97: South Korea Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 98: Rest-of-Asia-Pacific Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 99: Latin America Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 100: Latin America Positive Airway Pressure Devices Market (by Product Type), \$Million, 2019-2030

Figure 101: Latin America Positive Airway Pressure Devices Market (by Indication), \$Million, 2019-2030

Figure 102: Latin America Positive Airway Pressure Devices Market (by End User), \$Million, 2019-2030

Figure 103: Latin America Positive Airway Pressure Devices Market Share Analysis (by Country), \$Million, 2019 and 2030

Figure 104: Brazil Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 105: Mexico Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 106: Argentina Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 107: Colombia Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 108: Rest-of-Latin America Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 109: Middle East and Africa Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 110: Middle East and Africa Positive Airway Pressure Devices Market (by Product Type), \$Million, 2019-2030

Figure 111: Middle East and Africa Positive Airway Pressure Devices Market (by Indication), \$Million, 2019-2030

Figure 112: Middle East and Africa Positive Airway Pressure Devices Market (by End User), \$Million, 2019-2030

Figure 113: Middle East and Africa Positive Airway Pressure Devices Market Share Analysis (by Country), \$Million, 2019 and 2030

Figure 114: K.S.A. Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 115: U.A.E. Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 116: South Africa Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 117: Rest-of-Middle East and Africa Positive Airway Pressure Devices Market, \$Million, 2019-2030

Figure 118: 3B Medical, Inc: Overall Product Portfolio

Figure 119: 3B Medical, Inc.: SWOT Analysis

Figure 120: Apex Medical Corporation: Overall Product Portfolio

Figure 121: Apex Medical Corporation: SWOT Analysis

Figure 122: BMC Medical Co. Ltd.: Overall Product Portfolio

- Figure 123: BMC Medical Co. Ltd.: SWOT Analysis
- Figure 124: Breas Medical AB: Overall Product Portfolio
- Figure 125: Breas Medical AB: SWOT Analysis
- Figure 126: Compumedics Limited: Overall Product Portfolio
- Figure 127: Compumedics Limited: Overall Financials, \$Million, 2019-2021
- Figure 128: Compumedics Limited: Revenue (by Region), \$Million, 2019-2021
- Figure 129: Compumedics Limited: Research and Development Expenditure, \$Million, 2019-2021
- Figure 130: Compumedics Limited: SWOT Analysis
- Figure 131: Drive DeVilbiss Healthcare: Overall Product Portfolio
- Figure 132: Drive DeVilbiss Healthcare: SWOT Analysis
- Figure 133: Elmaslar Group: Overall Product Portfolio
- Figure 134: Elmaslar Group: SWOT Analysis
- Figure 135: Fisher & Paykel Healthcare Corporation Limited: Overall Product Portfolio
- Figure 136: Fisher & Paykel Healthcare Corporation Limited: Overall Financials, \$Million, 2019-2021
- Figure 137: Fisher & Paykel Healthcare Corporation Limited.: Revenue (by Segment), \$Million, 2019-2021
- Figure 138: Fisher & Paykel Healthcare Corporation Limited: Revenue (by Region), \$Million, 2019-2021
- Figure 139: Fisher & Paykel Healthcare Corporation Limited: Research and Development Expenditure, \$Million, 2019-2021
- Figure 140: Fisher & Paykel Healthcare Corporation Limited: SWOT Analysis
- Figure 141: Hebei Topson Medical Technology Co., Ltd.: Overall Product Portfolio
- Figure 142: Hebei Topson Medical Technology Co., Ltd: SWOT Analysis
- Figure 143: Kare Medical and Analytical Devices Ltd. Co.: Overall Product Portfolio
- Figure 144: Kare Medical and Analytical Devices Ltd. Co.: SWOT Analysis
- Figure 145: Koninklijke Philips N.V.: Overall Product Portfolio
- Figure 146: Koninklijke Philips N.V.: Overall Financials, \$Million, 2018-2020
- Figure 147: Koninklijke Philips N.V.: Revenue (by Business Segment), \$Million, 2018-2020
- Figure 148: Koninklijke Philips N.V.: Revenue (by Region), \$Million, 2018-2020
- Figure 149: Koninklijke Philips N.V.: SWOT Analysis
- Figure 150: L?wenstein Medical Technology GmbH + Co. KG.: Overall Product Portfolio
- Figure 151: L?wenstein Medical Technology GmbH + Co. KG.: SWOT Analysis
- Figure 152: Narang Medical Limited: Overall Product Portfolio
- Figure 153: Narang Medical Limited: SWOT Analysis
- Figure 154: ResMed Inc.: Overall Product Portfolio
- Figure 155: ResMed Inc.: Overall Financials, \$Million, 2019-2021

Figure 156: ResMed Inc.: Net Revenue (by Segment), \$Million, 2019-2021

Figure 157: ResMed Inc.: Revenue (by Region), \$Million, 2019-2021

Figure 158: ResMed Inc.: Research and Development Expenditure, \$Million, 2019-2021

Figure 159: ResMed Inc.: SWOT Analysis

Figure 160: Somnetics International, Inc.: Overall Product Portfolio

Figure 161: Somnetics International, Inc.: SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global Positive Airway Pressure Devices Market Challenges

Table 2: Global Positive Airway Pressure Devices Market Key Developments Analysis, January 2018-October 2021

Table 3: Global Positive Airway Pressure Devices Market COVID-19 Recovery Scenario Impact

Table 4: PAP Devices Reimbursement Schemes in Australia

Table 5: Key Barriers and Possible Solutions in Entering into the Global Positive Airway Pressure Devices Market

Table 6: European Commission Medical Device Directives

Table 7: Federal Agencies of EU Member States

Table 8: Regulatory Bodies in Asia-Pacific

Table 9: Awaited Technological Developments in the Global Positive Airway Pressure Devices Market

Table 10: Global Positive Airway Pressure Devices Market Business Models

Table 11: Global Positive Airway Pressure Devices Market Pricing Analysis (by Product Type), \$

Table 12: Opportunity Analysis (by Region), 2020 and 2021-2030

Table 13: North America PAP Therapy Fees

Table 14: U.S. PAP Therapy Fees

Table 15: Europe PAP Therapy Fees

Table 16: Germany PAP Therapy Fees

Table 17: U.K. PAP Therapy Fees

Table 18: France PAP Therapy Fees

Table 19: Italy PAP Therapy Fees

Table 20: Spain PAP Therapy Fees

Table 21: Asia-Pacific PAP Therapy Fees

Table 22: Latin America PAP Therapy Fees

Table 23: Middle East and Africa PAP Therapy Fees

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