

# Global Medical Gases Market Outlook to 2027

<https://marketpublishers.com/r/G7DAB2E9634DEN.html>

Date: January 2022

Pages: 204

Price: US\$ 4,490.00 (Single User License)

ID: G7DAB2E9634DEN

## Abstracts

Medical gases are widely used around hospitals and in the community and are piped into wards & clinical areas and supplied in cylinders. Medical gas is prescribed for a patient and classified as a drug. Extremely rigorous quality standards apply for the manufacture of medical gases, and once produced the content of specialty gases accurately measured to ensure that all components are present and remain precisely at the right levels. Medical air is used to provide power for several types of equipment, including surgical tools, ventilators, and nebulizers.

According to BlueQuark Research & Consulting, the global Medical gases market is expected to witness a considerable growth rate during the forecast period. The major factors responsible for the growth of the global medical gas market are the increasing number of chronic diseases such as asthma, cardiovascular diseases, diabetes, etc., and the growing geriatric population.

Chronic diseases are the primary cause of death and disability worldwide. The total number of people dying from chronic diseases is double that of all infectious diseases, including HIV, tuberculosis, and malaria, maternal and perinatal conditions, and nutritional deficiencies combined. In 2018, more than 30% of the total cases admitted to the hospitals were chronic disease cases. National surveys indicate that around one-third of the population worldwide reported having at least one chronic disease. According to the World Health Organization (WHO), in 2001, chronic diseases contributed approximately 60% of the 56.5 million. And total reported deaths in the world and about 46% of the global burden of disease. The proportion of the weight of noncommunicable conditions is expected to increase to 57% by 2020. Almost half of the total chronic disease deaths are attributable to cardiovascular diseases.

The worldwide chronic disease 'pandemic' was the subject of a high-level United Nations (UN) meeting in 2011, which called for a 25% reduction by 2025 in mortality

from chronic diseases among people aged between 30 and 70, adopting the slogan '25 by 25'. Tobacco smoking, alcohol consumption, physical inactivity, and unhealthy eating are modifiable risk factors that are common to the four major chronic respiratory diseases and are responsible for a substantial proportion of chronic disease diagnoses and deaths. Obesity has become a severe problem throughout Asia, Latin America, and parts of Africa, one of the major factors responsible for chronic disease prevalence. Around 79% of the total deaths due to chronic diseases worldwide are happening in these developing countries. And also, the incidence of obesity has doubled and even tripled over the past decade.

As the coronavirus pandemic spreads, the oxygen demand is soaring high in most of the developing countries as medicinal oxygen gas supply is expensive and hard to get. In Spain, as coronavirus deaths climbed, engineers laid seven kilometers of tubing in less than a week to give 1,500 beds in an impromptu hospital a direct supply of pure oxygen. In Peru, which has more than 100 thousand active Covid-19 cases as of 9th July 2020, the president has ordered industrial plants to ramp up production for medical use or buy oxygen from abroad. He allocated about USD 28 million for oxygen tanks and new plants. Many national governments have also scaled up the production of medical gas supply, particularly oxygen. For instance, in India, an order for 103,000 new medical oxygen cylinders have been placed to tackle the growing demand in the year 2020.

The global Medical Gases market is segmented on the basis of Product and Application. The product segment is further segmented as Pure Gases and Mixtures. Pure gases include oxygen, nitrogen, carbon dioxide, nitrous oxide, medical air, and helium. Among all of them, oxygen and nitrogen are the most used pure gas. Pure medical gas system have long been an established aid to medical treatment, and year after year, researchers and technicians continue to discover new, successful applications.

Increasing cases of respiratory disorders like COPD, Asthma, and Covid-19 are anticipated to boost the market for medical gas delivery. The long-term use of oxygen therapy has significantly improved the survival rate of these patients. Besides, manufacturers are introducing new technologies in the market to improve the quality of medical gas systems. For instance, the Clarity online platform by GCE Healthcare is a remote monitoring platform that helps home oxygen providers to manage portable oxygen concentrators. Similarly, hIOTron, an Indian technology corporation focused on end-to-end IoT solutions, has come up with an RTMS solution of medicinal gases that help track the location of every tank and their gas supply level and volume time-based

records.

According to the World Health Organization (WHO), every year, approximately 20 to 50 million people suffer non-fatal injuries. Moreover, more than 18 million people died from cardiovascular diseases in 2018. Increasing the number of road injuries and cardiac diseases has also pushed the number of surgeries globally, which has boosted the market for medicinal gases such as oxygen and nitrous oxide. More than two million people receive medical oxygen per year. According to the National Health Service, around 17.5% of UK hospital patients are receiving oxygen at a given time. Similarly, there is an increase in the consumption of nitrous oxide as anesthesia with a growing number of surgeries.

Based on geography, the global Medical Gases Market is segmented into Asia Pacific, North America, South America, Europe, and Middle East & Africa. North America is the most dominating region in the medical gas market due to the availability of state-of-the-art medical facilities and the growing number of lifestyle-related diseases.

With the ongoing Covid-19 pandemic in the United States, the GDP growth rate for the first quarter of 2020 was -4.8% compared to the growth rate of 2.1% in the fourth quarter of 2019. Growing several various respiratory diseases such as asthma and COPD and other medical conditions like cardiovascular and lifestyle diseases have increased the use of medical gas systems in healthcare facilities. Moreover, 2020 has significantly boosted the market for medical gas supply in the country due to the ongoing coronavirus pandemic. Covid-19 has pushed substantially the consumption of medical gas 5-10 times the usual demand in the hospitals. The United States reported more than three million Covid-19 cases by 9th July 2020.

According to the Centers for Disease Control and Prevention (CDC), up to 64% of the critically ill patients treated for Covid-19 have received high-flow oxygen therapy, and up to 71% of patients received mechanical ventilation. According to the US Food and Drug Administration (FDA), medical gas are manufactured at over 4,000 manufacturing locations across the United States, the vast majority of which are small businesses. Amid up swinging, market players have pushed their production of medical gasses to satisfy the growing need in cases. For instance, Air Liquide has increased production and inventory of essential medical gas, like oxygen, and is actively managing its gas assets and safety hardgoods inventory to prioritize the needs of the US healthcare system and government.

In partnership with a local government, major companies are trying to stabilize the

supply chain and are preparing portable assets to serve the eventual oxygen gas cylinders needs of mobile treatment centers. Recently, Air Liquide has commissioned the ever largest hydrogen underground storage facility in Beaumont, Texas. The storage cavern is proficient enough to hold hydrogen to back up a large-scale steam methane reformer unit for a month and is 1,500 meters deep and around 70 meters in diameter. Similarly, knowing that oxygen delivered daily to hospitals is vital to the Covid-19 response, AIRGAS has implemented business-continuity measures based on local needs by giving the topmost priority to medical facilities. The company is also ramping up the production of critical medical gas delivery to meet the additional demand related to Covid-19 to ensure continued production and delivery of essential products. The market for medical gases in the United States is also affected by encouraging industry initiatives by the government, such as the implementation of the US FDA Safety and Innovation Act in 2018 and safety inspections and monitoring to evaluate proper usage. The US Department of Homeland Security (DHS) Cybersecurity and Infrastructure Security Agency issued guidance on 'Essential Critical Infrastructure Workers' during the response to the COVID-19 pandemic, stating that medical gases are essential.

Some of the major key players in the global market are Air Liquide S.A. , The Linde Group , Air Products and Chemicals, Inc. , Matheson Tri-Gas Inc. , and Mitsubishi Chemical Holdings Corporation , among others.

In Jun 2019, To develop its healthcare business in Europe Air Liquide acquired Medidis, a major player in the Netherlands for the treatment of respiratory diseases at home and the production and supply of medical oxygen gas cylinders.

In April 2019, Air Liquide acquired Spain's DiaLibre, a startup that specializes in diabetes care. Its offering combines personalized therapeutic support programs and medical follow-up for patients using innovative technologies.

Our Global Medical Gases Market report provides deep insight into the current and future state of the Medical Gases market across various regions. Also, the study comprehensively analyzes the Medical Gases market by segments based on the product (Pure Gases (Oxygen, Nitrous Oxide, Carbon Dioxide, Nitrogen, Medical Air and Helium ) and Mixtures), by delivery (High-Pressure Cylinders, Liquid Cylinders, and Bulk Supply), by application (Therapeutic, Diagnostic and Others (Pharmaceutical Manufacturing, Biotechnology, etc.)), and by Geography (Asia Pacific, North America, Europe, South America, and Middle-East and Africa). The report examines the market drivers and restraints, along with the impact of Covid-19 are influencing the market

growth in detail. The study covers & includes emerging market trends, market developments, market opportunities, market size, market analysis, market dynamics, and challenges in the industry. This report also covers extensively researched competitive landscape sections with profiles of major companies, including their market share and projects.

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Medical Gases - Market Share of Key Companies in 2020

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