

Global Oxygen Delivery Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Oxygen Delivery Equipment market size is expected to reach \$ 23965 million by 2032, rising at a market growth of 6.3% CAGR during the forecast period (2026-2032).

Oxygen delivery equipment refers to a category of medical devices that transport oxygen from storage or generation systems to the patient's respiratory tract to correct hypoxic symptoms, provide cardiopulmonary support, or deliver therapeutic gases. Its technical essence lies in precisely controlling oxygen concentration, flow rate, and delivery mode to meet diverse oxygen therapy needs ranging from intensive care to home-based rehabilitation. From a product morphology perspective, oxygen delivery equipment encompasses two major tiers: oxygen source devices and patient interface devices. Oxygen source devices include oxygen concentrators, liquid oxygen tanks, and high-pressure oxygen cylinders. Among these, oxygen concentrators utilize molecular sieve pressure swing adsorption technology to separate oxygen from ambient air and represent the mainstream choice for home oxygen therapy, while oxygen cylinders primarily serve emergency transport and high-flow oxygen delivery. Patient interface devices include nasal cannulas, oxygen masks, high-flow nasal cannulas, and high-flow nasal oxygen therapy systems, with their design directly affecting oxygen utilization efficiency and patient comfort. In clinical classification, oxygen delivery equipment can be divided into life support grade and long-term care grade. The former, represented by extracorporeal membrane oxygenation systems and high-flow nasal oxygen therapy systems, is used in intensive care and perioperative management; the latter, represented by home oxygen concentrators and portable oxygen concentrators, serves home-based rehabilitation for patients with chronic respiratory diseases. Currently, with population aging and the rising prevalence of chronic respiratory diseases, the functional positioning of oxygen delivery equipment is extending from clinical treatment

tools toward full-cycle health management platforms.

Market Development Opportunities and Key Drivers

In March 2026, Shenzhen Hannuo Medical's single-use membrane oxygenator received FDA clearance in the United States, with its ECMO system having previously obtained domestic and EU certifications, marking the entry of domestically produced extracorporeal life support equipment into the global mainstream market. In the high-altitude oxygen supply sector, Berlin Shengkang's oxygen concentrator, featuring self-developed four-tower rotary valve technology, achieves a service life exceeding 100,000 hours and normal operation in -40°C environments, with an intelligent remote monitoring system enabling real-time transmission of parameters such as oxygen concentration, flow rate, and pressure. In the mobile oxygen therapy sector, in January 2026, Raymed announced an investment of 10 million RMB to establish a joint venture company to expand into high-altitude mobile oxygen therapy, promoting the implementation of an 'intelligent mobile oxygen supply combination solution' across home, travel, high-altitude, and emergency scenarios.

Market Challenges and Risks

The raw material for ECMO's most critical component, the membrane oxygenator—PMP polyolefin material—is supplied exclusively by a single company globally, exposing domestically produced equipment to significant supply chain risks. Imported brands have long dominated the market, with German company Maquet holding 60% to 80% of the domestic ECMO market share, making domestic substitution challenging. Hannuo Medical accumulated losses exceeding 670 million RMB from 2022 to the first half of 2025, with net cash flow from operating activities remaining negative and its asset-liability ratio climbing from 31.96% to 72.36%. Although its core products have been adopted in over 140 hospitals nationwide, the million-yuan unit price has not yet generated scaled revenue.

Downstream Demand Trends

In March 2026, the core component of Hannuo Medical's ECMO system—the single-use membrane oxygenator—received FDA clearance, with the domestically produced ECMO system having now obtained market access in over 40 countries and regions globally, laying the regulatory foundation for the overseas expansion of domestically produced high-end oxygen therapy equipment. In the high-altitude oxygen supply sector, Berlin Shengkang secured three consecutive high-altitude oxygen supply project contracts in

January 2026, with full-year orders already filled. In the mobile oxygen therapy sector, Raymed's mobile oxygen therapy business, established in January 2026, covers home, travel, high-altitude, and emergency scenarios, building a complete product matrix from stationary oxygen stations to portable devices. The large-scale production of domestically produced ECMO will fundamentally reduce dependence on imported equipment, providing equipment support for national public health security and critical care capacity enhancement.

Regional Trends

North America, leveraging its mature regulatory system and reimbursement mechanisms, continues to lead technology validation and market access for high-end oxygen therapy equipment. In March 2026, Hannuo Medical's membrane oxygenator received FDA clearance, marking the first entry of a domestically produced ECMO core component into the U.S. market and demonstrating the technological maturity of Chinese manufacturing in the high-end life support equipment sector. Europe maintains its advantage in clinical evidence accumulation and standardization, with Hannuo Medical's ECMO system receiving EU-recognized T?V S?D certification in 2025, laying the foundation for entry into mainstream European markets. In the Asia-Pacific region, China is emerging as the most dynamic growth area for oxygen therapy equipment. ECMO devices from Jinan, Shenzhen, and other cities have successively received approvals, reflecting the growing regional clustering effect in high-end medical device manufacturing. Domestic brands such as Raymed and Berlin Shenkang are expanding into new sectors including mobile oxygen therapy and high-altitude oxygen supply, with Berlin Shenkang's products already exported to Peru, Uzbekistan, Indonesia, and other countries. In 2025, Jinan's local technology conversion rate maintained double-digit growth for three consecutive years, with technology contract transaction value exceeding 100 billion RMB.

This report studies the global Oxygen Delivery Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Oxygen Delivery Equipment and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Oxygen Delivery Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Oxygen Delivery Equipment total production and demand, 2021-2032, (Units)
Global Oxygen Delivery Equipment total production value, 2021-2032, (USD Million)
Global Oxygen Delivery Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Oxygen Delivery Equipment consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Oxygen Delivery Equipment domestic production, consumption, key domestic manufacturers and share
Global Oxygen Delivery Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global Oxygen Delivery Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global Oxygen Delivery Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Oxygen Delivery Equipment market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Philips Healthcare, Nidek Medical, CAIRE, Inogen, Chart Industries, ICU Medical, Dragerwerk, Teleflex, ResMed, Teijin, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Oxygen Delivery Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (USD/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Oxygen Delivery Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Oxygen Delivery Equipment Market, Segmentation by Type:

Oxygen Concentrators

Oxygen Cylinders

Nasal Cannulas

Oxygen Masks

Global Oxygen Delivery Equipment Market, Segmentation by Technology Principle:

Stored Oxygen

Membrane Separation

Cryogenic Air Separation

Pressure Swing Adsorption

Chemical Oxygen Generation

Global Oxygen Delivery Equipment Market, Segmentation by Oxygen Concentration:

Low Concentration

Medium Concentration

High Concentration

Global Oxygen Delivery Equipment Market, Segmentation by Mobility:

Stationary Devices

Portable Devices

Global Oxygen Delivery Equipment Market, Segmentation by Application:

Respiratory Disease

Emergency Medicine

High Altitude Medicine

Sports Medicine

Companies Profiled:

Philips Healthcare

Nidek Medical

CAIRE

Inogen

Chart Industries

ICU Medical

Dragerwerk

Teleflex

ResMed

Teijin

BOC Healthcare

HANNOVO Medical

BMC Medical

Berlin Voncon Medical

Longfian Scitech

Yuwell Medical

Besco Medical

Key Questions Answered:

1. How big is the global Oxygen Delivery Equipment market?
2. What is the demand of the global Oxygen Delivery Equipment market?
3. What is the year over year growth of the global Oxygen Delivery Equipment market?
4. What is the production and production value of the global Oxygen Delivery Equipment market?
5. Who are the key producers in the global Oxygen Delivery Equipment market?
6. What are the growth factors driving the market demand?

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