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Anesthesia Devices - A Global Market Overview

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Abstracts

Procuring refurbished anesthesia equipment has been a significantly noticeable trend among a number of healthcare organizations, clinics and outpatient surgery centers. The familiarity of anesthetists with a specific machine due to years of proficiency in using it and longer waiting periods for new equipment to be delivered are factors that have opened the gates for refurbishers to enter the anesthesia equipment marketplace. Other reasons for investing in comparatively cheaper refurbished equipment include easy availability of spare parts that can help in keeping the machines in proper working order, which can also be used in cases of maintaining back-ups. Readily available parts help in decreasing downtime, and facilities with extensive research departments opt for refurbished equipment for extending their purchasing power within limited budgets, thereby ensuring that resources are either stretched to the maximum or employed for other gainful and unavoidable requirements.

The evolution of anesthesia machines has encompassed the journey from being standalone non-networked systems to networked anesthesia workstations that comprise anesthesia monitors and anesthesia information systems (AIMS). The last decade has witnessed manufacturers introducing anesthesia machines with features, such as advanced ventilators, additional and new modes of ventilation, graphical screens, and loops that offer a clearer picture of the patient, with a major proportion of the ventilators being electronic and driven by software. The buyer now has several advanced ventilation options to choose from, such as synchronized intermittent mandatory ventilation (SIMV), pressure support ventilation (PSV) and pressure controlled ventilation-volume guaranteed (PCV-VG), with the additional alternative of either updating them or purchasing them on a prioritized basis.

Anesthesia device product segments analyzed in this study include Delivery Machines, Disposables & Accessories, Monitors and Information Systems. The global market for Anesthesia Devices is estimated at US$7.4 billion in 2013 and forecast to be US$8.1

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billion in 2014. Maintaining a CAGR of about 7.5% between 2010 and 2020, Anesthesia Devices market worldwide is further projected to reach US$11.8 billion by 2020.

The report reviews, analyses and projects the anesthesia devices market for global and the regional markets including North America, Europe, Asia-Pacific and Rest of World. The regional markets further analyzed for 13 independent countries across North America – The United States and Canada; Europe – Germany, the United Kingdom, France, Italy, Spain, Bulgaria, Czech Republic and Hungary; Asia-Pacific – Japan, China and India.

The study includes 84 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. The statistical tables represent the data for the global market value in US$ by geographic region and product segment. This report profiles 33 key global players and 39 major players across North America – 17; Europe – 13; Asia-Pacific – 8 and Rest of World - 1. The research also provides the listing of the companies engaged in manufacturing and supply of anesthesia devices. The global list of companies covers addresses, contact numbers and the website addresses of 172 companies.

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Analogic Corporation
Astrazeneca PLC
B. Braun Medical Inc
B. L. Lifesciences Private Limited
Baxter International Inc.
Becton, Dickinson and Company
Cardinal Health
Covidien Plc
Dixtal Biom?dica Ind?stria E Com?rcio Ltda.
Dr?gerwerk AG & Co. KGaA
Esaote SpA
Fisher & Paykel Healthcare Limited
GE Healthcare Ltd
Getinge AB
Hospira, Inc.
Intersurgical Ltd
Kimberly-Clark Health Care Inc.
Leventon, S.A.U.
Maquet GmbH & Co. Kg
Masimo Corporation
Mindray Medical International Limited
Nihon Kohden Corporation
Parker Healthcare Pty Ltd
Penlon Limited
Perkinelmer Inc.
Philips Healthcare
Siare Engineering International Group S.R.L.
Smiths Medical, Inc.
Sonosite Inc

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Teleflex Incorporated
Terumo Corporation
Unomedical Pty Ltd.

4. KEY BUSINESS TRENDS

Rusch TruLite Single-Use Laryngoscope System Introduced by Teleflex
Teleflex and HealthTrust Enter Into New Agreement
Teleflex Completes Ultimate Medical Acquisition
Paion Completes Phase II/III Trial of Remimazolam in Japan
Cardinal Health Bars the Commercialization of Pre-assembled Filter and Anesthesia Circuit in Pre-made Packs
Teleflex Plans to Demonstrate its Novel Anesthesia Portfolio at Euroanaesthesia Congress
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Teleflex Marks Regional Anesthesia Agreement with HealthTrust
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Launch of Teleflex's new Arrow FlexTip Plus Multi-Port Epidural Catheter
Teleflex Acquires LMA International
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OSI Systems Arkon Receives Health Canada's Medical Device License
Unveiling of First Web-Based App for Anesthesia Services by Somnia
Maquet GmbH Partners with Siemens Healthcare for Hybrid OR
Spacelabs Healthcare Unveils Arkon Anesthesia Delivery System
Mindray and HealthTrust Collaborate for Anesthesia Equipment and Supplies
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FDA Approves OSI Systems Enhanced Flow Meter Visualization
Teleflex and HealthTrust Enters Airway Anesthesia and Laryngoscope Contracts
Teleflex Collaborates with Asklepios Hospital Group for ambIT PCA Pump
King Systems' King Flex2 Automation Line
Maquet Cardiovascular Acquires Atrium Medical Corporation
Launch of OSI Systems' Multigas Module
Mindray Launches the A3 Anesthesia System and Broadens its A Series Portfolio
PharmGuard Anesthesia Software Service Unveiled by Smiths Medical
2011 Best in KLAS Award for OmniRx Automated Medication Dispensing System
DRE, Inc.'s Biomedical Field Services Division Started
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  B. Braun Medical Inc (United States)

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Becton, Dickinson and Company (United States)
Cardinal Health (United States)
Carefusion Corporation (United States)
Hospira, Inc. (United States)
Kimberly-Clark Health Care Inc. (United States)
King Systems Corporation (United States)
Masimo Corporation (United States)
Medline Industries, Inc. (United States)
Mindray DS USA, Inc. (United States)
Perkinelmer Inc. (United States)
Smiths Medical, Inc. (United States)
Spacelabs Healthcare, Inc. (United States)
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Astrazeneca PLC (United Kingdom)
Covidien PLC (Ireland)
Dr?gerwerk AG & Co. KGaA (Germany)
Esaote SpA (Italy)
GE Healthcare Ltd (United Kingdom)
Getinge AB (Sweden)
Intersurgical Ltd (United Kingdom)
Leventon, S.A.U. (Spain)

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Penlon Limited (United Kingdom)
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About

Anesthesia Delivery Machines

In its most fundamental format, as depicted in the figure below, an anesthesia machine is utilized by an anesthesiologist for controlling a patient's gas exchange and administering inhalation anesthetics.

However, contemporary anesthesia machines have evolved to become highly complex systems that are incorporated with a host of inbuilt safety features and devices, a breathing circuit, monitors, a mechanical ventilator, and one or multiple microprocessors for improving, integrating and monitoring all components. Monitors that do not form a part of an anesthesia machine are added externally to become fully integrated with the unit. Further, the modular designs of anesthesia machines facilitate an extensive range of optional configurations and features within the same product series, leading to the use of anesthesia workstation as the more prevalent term.

Over the past several years, redesigning of equipment and education have enabled in making significant progress in relation to minimizing the number of adverse outcomes resulting from anesthetic gas delivery equipment. Statistics have revealed that misusing anesthesia gas delivery equipment has a three times greater prevalence compared to equipment malfunction in causing adverse outcomes related to equipment. Equipment misuse can be categorized as errors in preparation, maintenance or deployment of a device, and avoidable anesthetic mishaps are more often than not associated with lacking equipment familiarity and failure in checking machine function.

About 39% of all injuries are attributed to breathing circuits, with a major proportion of the incidents being related to misconnects or disconnects, with a misconnect being def ned as "a nonfunctional and unconventional configuration of breathing circuit components or attachments." Other causes were associated with vaporizers (21%), ventilators (17%) and oxygen supply (11%), while only 7% of the instances were accounted for by failure of other more basic components of the anesthesia machine.

Enhanced Features of Anesthesia Equipment Boosts Market Prospects

The specialized field of anesthesiology has been garnering much attention of late in the overall hospital care system. The anesthesia market has been witnessing rapid increases due to mounting safety awareness and advancements in anesthesia machine

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technology. Government funding initiatives have resulted in ensuring the gradual transitioning of healthcare facilities and hospitals toward sophisticated equipment. An ever-enhancing demand for cutting-edge anesthesia equipment from surgeons, anesthesiologists and clinicians for operating room procedures has also been instrumental in shaping market dynamics.

Trends in Technology

The existing anesthesia technology scenario is dominated by low-flow anesthesia and lectronic medical records (EMRs), which contribute to considerable savings. Though providing economy, efficacy, safety and eco-friendliness in the administration of general anesthesia, possible drawbacks can include accumulation of carbon dioxide (CO2) and other gases. Integrating EMRs with the perioperative environment enables medical professionals in offering improved patient care, in addition to enhancing financial efficiency. The integration of synchronized data into a patient’s EMR should be facilitated by anesthesia equipment in order that clinical documentation, patient safety, regulatory compliance and billing effectiveness are maximized. Clinical data has to be precise for healthcare providers in monitoring level of patient care and keeping track of the quality of patient outcomes. Other features that are being widely incorporated include multi-gas monitoring, oxygen monitoring and anesthesia gas monitoring, with standard flow meters giving way to digital flow meters for greater accuracy. Additional enhancements that would go a long way in expanding market prospects include integration of devices, such as infusion pumps and syringe pumps with the anesthesia workstation.

Total intravenous anesthesia (TIVA) is an anesthetic machine that is highly user-friendly and ideal for patients undergoing small- to medium-sized cosmetic surgery operations. This technology has now become an option of choice for patients because of its unique ability of quickly clearing out of a patient's system, enabling a rapid and effortless awakening with minimal possibility of nausea. In addition, TIVA offers the option of adjustments ranging from light to deep sedation without impairing a patient’s airway and breathing, making it specifically ideal for facial surgeries. This technique has been widely applied for outpatient cosmetic surgery procedures, such as breast augmentation, medium-sized facial surgeries, eyelid surgeries, fat transfer, skin peels and liposuctions. Using TIVA also enables in multimodal intra-operative neurophysiologic monitoring in instances of complex spinal surgeries, and can also cater to the distinctive anesthetic demands of pediatric patients.

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