

North America Sleep Apnea Industry (Country Specific Market Assessment): Drivers, Opportunities, Trends and Forecasts: 2018 - 2024

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Abstracts

North America Sleep Apnea Market – Drivers, Opportunities, Trends, and Forecasts: 2018-2024

Overview: Sleep apnea is a condition in which a person stops breathing for few seconds at night either due to airway blockage or due to no signal from brain. In severe condition a person stops breathing more than 10 times an hour. American Journal of Epidemiology stated that, in 2013 around 26% of adults aged 30-70 have some type of sleep apnea, where 16% of them have mild sleep apnea and 10% have severe sleep apnea.

Among the diagnostic devices, the current gold standard for OSA is polysomnography. But the market adoption rate is high for actigraphy devices, and hence is expected to have the highest growth rate during the forecast period. Among the therapeutic devices, the PAP machines occupy significant share. Along with this, the market for their consumables is also high. But nasal obstruction, discomfort of the PAP masks, and nose & mouth dryness are some of the unmet needs of sleep apnea.

The market for North America sleep apnea devices is growing due to the factors such as rising usage of oral appliances, growing awareness of ill effects of untreated sleep apnea in developed countries, and increasing lifestyle diseases such as diabetes, and obesity. However, alternative treatment for the sleep apnea, and stringent regulatory approval are hampering the market.

Market Analysis: The “North America Sleep Apnea Device Market” is estimated to witness a CAGR of 7.7% during the forecast period 2018-2024. The Sleep Apnea

Devices market is analyzed based on three segments – Device types, end-users and regions.

Regional Analysis Geographically, US dominated the North America sleep apnea devices market, followed by Canada. These two regions collectively occupy a share more than 90.0% of the total market. This was due to availability of technologically advanced sleep laboratories and increasing awareness of sleep apnea in these regions. Moreover, high obesity rate and good reimbursement facility are accelerating the growth of the market.

Device Types Analysis: Polysomnography (PSG), home sleep titration, and CPAP titration are the sleep apnea diagnosis techniques in the market. The market is dominated by the PSG diagnosis due to the high accuracy rate in the diagnosis of the condition. Nevertheless, the growth rate is majorly seen in the actigraphy device segment owing to its high sensitivity during the sleep study process.

Therapeutic devices such as positive airway pressure (PAP) devices, and oral appliances are widely used in the market, where PAP devices are the first line of treatment. However, nasal obstruction and discomfort of the PAP masks, and nose & mouth dryness are some of the unmet needs of sleep apnea. Oral appliance is used to address the unmet need of the CPAP devices.

End-Users Analysis: Among the end users, large market share is occupied by hospitals and sleep laboratories. Technological advancements in the devices are giving rise to user friendly and compact products. These factors are making the market of home sleep study products to grow at a high rate.

Key Players: The market leaders for sleep apnea devices are ResMed, Philips Healthcare, Becton Dickinson and Company (CareFusion) and Fisher and Paykel. Other leading players in the market includes SomnoMed Ltd, Compumedics Ltd, Cadwell Laboratories, Imthera Medical, Itamar Medical, and BMC Medical.

Competitive Analysis: Though sleep apnea is one of the most common conditions in the society, many people are unaware of its effects and symptoms, which has led to large undiagnosed population. Increasing awareness of the of the ill effects of the disorder among people, will widen the opportunity for the sleep apnea device manufacturer in the North American region. Availability of reimbursement will further help in the growth of the market.

Benefits: The report provides complete details about the usage and adoption rate of sleep apnea in various verticals and countries. With that, key stakeholders can know about the major trends, drivers, investments and vertical player's initiatives. Moreover, the report provides details about the major challenges that are going to impact on the market growth. Additionally, the report gives the complete details about the key business opportunities to key stakeholders to expand their business and capture the revenue in the specific verticals to analyze before investing or expanding the business in this market.

Key Stakeholders:

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