

# Global Medical High-Flow Humidified Oxygen Therapy Device Market Growth 2026-2032

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## Abstracts

The global Medical High-Flow Humidified Oxygen Therapy Device market size is predicted to grow from US\$ 618 million in 2025 to US\$ 949 million in 2032; it is expected to grow at a CAGR of 6.3% from 2026 to 2032.

In 2025, global Medical High-Flow Humidified Oxygen Therapy Device production reached approximately 288,943 units, with an average global market price of around US\$ 2,185 per unit.

High flow oxygen therapy is a form of respiratory support used in the hospital where oxygen, often in conjunction with compressed air and humidification, is delivered to a patient at rates of flow higher than that delivered traditionally in oxygen therapy. High flow oxygen therapy is usually delivered using a blender connected to a wall outlet, a humidifier, heated tubing and nasal cannula.

In this report, we only statistics the humidifiers, not include the consumables like nasal cannula, etc.

Medical High-Flow Humidified Oxygen Therapy Device, typically including high-flow nasal cannula (HFNC) or nasal high-flow platforms, are non-invasive respiratory support devices designed for spontaneously breathing patients. They deliver precisely controlled blends of air and oxygen at high flow rates, usually around 2-70 L/min, through an integrated flow generator and blender, active humidifier, heated breathing circuit, and dedicated nasal cannula or mask interface. By providing warmed and humidified gas at adjustable FiO<sub>2</sub>, these systems improve alveolar ventilation and oxygenation while washing out nasopharyngeal dead space. Clinically, high-flow oxygen therapy is used in acute hypoxemic respiratory failure, COPD and asthma exacerbations, post-operative

and post-extubation support, neonatal and pediatric care, and respiratory management of infectious diseases. Randomized trials and practice guidelines show that, compared with conventional oxygen therapy, high-flow oxygen can reduce escalation to non-invasive or invasive ventilation, while enhancing patient comfort, tolerance, and workflow efficiency for clinicians. As a result, adoption is expanding from intensive care units into emergency departments, general wards, and even home-care settings, making high-flow systems a critical component of modern respiratory care.

From a production model perspective, Medical High-Flow Humidified Oxygen Therapy Device typically follow a 'capital equipment + single-use consumables' business model. Upstream suppliers provide DC brushless blowers and air compressors, high-accuracy mass flow meters and pressure/temperature/humidity/oxygen sensors, embedded control boards, power modules, as well as medical-grade plastic housings, silicone or TPE nasal cannulas, heated breathing circuits, and water chambers. This layer includes global sensor and electronics leaders alongside regional manufacturers of medical plastics and silicone components. Midstream brand owners focus on system architecture, embedded software and control algorithms, key component selection and partial in-house manufacturing, final assembly, and calibration. In some regions, they partner with local OEM/ODM plants to speed time-to-market and optimise cost. Downstream, sales are driven through hospital tenders, distributor networks, and direct sales teams into ICUs, emergency departments, respiratory and anaesthesia units, operating rooms, and rehabilitation wards. In several countries, high-flow platforms such as Fisher & Paykel Healthcare's Airvo and Optiflow solutions are also entering home-care and long-term oxygen therapy segments.

In terms of profitability, high flow systems combine meaningful technical barriers with attractive recurring consumables, resulting in blended gross margins typically in the 45%-60% range under scaled manufacturing and disciplined pricing. Market leaders with strong brands, robust clinical evidence, and high value-added disposable portfolios can approach or exceed 60% gross margin. Fisher & Paykel Healthcare, a key global player in respiratory humidification and high-flow therapy, reported FY2024 gross margins of about 60% and reiterated a long-term target around 65%, providing a realistic benchmark for top-tier profitability in this field.

Across the value chain, high-performance sensors, blowers, and control electronics upstream underpin the precision and reliability of therapy; midstream manufacturers differentiate through ongoing clinical collaboration and R&D in algorithms, humidification technology, flow path design, and ergonomics; downstream, value creation is realised by expanding installed base, increasing consumable pull-through, and broadening into

out-of-hospital and international markets. With digitalisation and connected care, new-generation platforms featuring integrated batteries, wider flow ranges, and real-time respiratory analytics are becoming core components of 'smart respiratory care platforms,' and open the door to software-enabled services and data-driven business models.

At the macro level, ageing populations and the rising prevalence of COPD and other chronic respiratory diseases underpin sustained growth of the overall oxygen therapy market, while high flow oxygen therapy occupies a higher-acuity, higher-value niche within this expansion. The COVID-19 pandemic dramatically accelerated adoption by driving large-scale installations and extensive clinical experience; evidence from trials and guidelines showing reduced escalation of care and improved outcomes in hypoxemic respiratory failure has since been embedded into routine treatment protocols, converting the one-off pandemic surge into a long-term structural uplift. Meanwhile, leading vendors continue to introduce new platforms with integrated batteries, extended flow ranges, real-time data and connectivity, and are investing in clinical education and channel expansion in Latin America and Asia-Pacific, opening structural growth opportunities beyond traditional developed markets.

After the extraordinary surge during the pandemic, demand for high flow devices has normalised, and growth rates have converged toward or slightly below the broader oxygen therapy market. Some regions face temporary overcapacity due to earlier rapid installations, pressuring capacity utilisation and channel inventory for manufacturers. Hospitals, under tightening reimbursement, DRG-type payment schemes, and national procurement initiatives, have become more price-sensitive on both capital and disposables. High flow systems must compete with non-invasive ventilation and conventional oxygen therapy on cost-effectiveness and infection-control profile, while clinical data suggest that in some scenarios HFNC and NIV have comparable efficacy and aerosol generation remains a concern. If vendors cannot clearly articulate clinical and economic advantages and position the technology within guidelines, they face risks of pricing pressure, substitution by alternative modalities, and potential downgrades in clinical recommendations. In addition, stringent regulatory and quality requirements, as well as potential product recalls and export-compliance issues, can temporarily weigh on gross margins and brand reputation.

In terms of application, high flow oxygen therapy is evolving from a 'nice-to-have ICU tool' into a hospital-wide respiratory platform, with rising penetration in emergency rooms, general medical and surgical wards, peri-operative care, and rehabilitation units. New-generation systems with broader flow ranges, unified adult-pediatric modes,

intuitive touchscreens, and real-time respiratory monitoring are designed for cross-department use and support hospitals in building a graded respiratory support pathway from conventional oxygen through high flow and NIV to mechanical ventilation. Outside the hospital, demand for home-based chronic disease management and long-term oxygen therapy is growing, and integrated home high-flow systems and comfort-optimised cannulas are emerging as important options for selected COPD, interstitial lung disease, and sleep-related breathing disorder patients, creating a more stable base of consumables and service revenue. From a business model standpoint, the combination of hardware installations with single-patient disposable circuits and interfaces is now standard; manufacturers focus on increasing installed base density, embedding devices into clinical pathways through training and support, and expanding into growth regions such as Latin America and Asia-Pacific to enhance long-term visibility of cash flows. At the same time, mask-free, comfort-oriented high flow solutions with disposable circuits—such as those emphasised by leading high-velocity therapy vendors—offer a differentiated alternative to traditional NIV, deepening partnerships with hospitals and positioning high flow platforms as strategic components of future respiratory care ecosystems.

Currently, major Medical High-Flow Humidified Oxygen Therapy Device players include Fisher & Paykel Healthcare, RMS Medical, TNI medical (Masimo), Micomme Medical, Medline Industries (Teleflex), Vapotherm, Armstrong Medical, Drägerwerk, BMC Medical, Hamilton Medical, Great Group Medical, Yuwell, Talent Medical Electronics, Beijing Aeonmed, Beyond Medical, Inspired Medical (Vincent Medical), Shenzhen Mindray Bio-Medical, Shenzhen Comen Medical Instruments, Awakzon Medical (Jiangsu), Guangzhou Hypnus Healthcare, Telesair, Shenzhen Northern Meditec, etc. Top 5 took up more than 85% of the global market in 2025.

LP Information, Inc. (LPI) 's newest research report, the "Medical High-Flow Humidified Oxygen Therapy Device Industry Forecast" looks at past sales and reviews total world Medical High-Flow Humidified Oxygen Therapy Device sales in 2025, providing a comprehensive analysis by region and market sector of projected Medical High-Flow Humidified Oxygen Therapy Device sales for 2026 through 2032. With Medical High-Flow Humidified Oxygen Therapy Device sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Medical High-Flow Humidified Oxygen Therapy Device industry.

This Insight Report provides a comprehensive analysis of the global Medical High-Flow Humidified Oxygen Therapy Device landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest

development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Medical High-Flow Humidified Oxygen Therapy Device portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Medical High-Flow Humidified Oxygen Therapy Device market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Medical High-Flow Humidified Oxygen Therapy Device and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Medical High-Flow Humidified Oxygen Therapy Device.

This report presents a comprehensive overview, market shares, and growth opportunities of Medical High-Flow Humidified Oxygen Therapy Device market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Manual Oxygen Adjustment

Automatic Oxygen Regulation

#### Segmentation by Maximum Flow Rate:

Maximum Flow Rate: 60L/min

Maximum Flow Rate: 80L/min

Other

#### Segmentation by Patient Populations:

Neonatal & Pediatric

Adults

Segmentation by Application:

Hospital Use

Homecare

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Fisher & Paykel Healthcare

RMS Medical

TNI medical (Masimo)

Micomme Medical

Medline Industries (Teleflex)

Vapotherm

Armstrong Medical

Dr?gerwerk

BMC Medical

Hamilton Medical

Great Group Medical

Yuwell

Talent Medical Electronics

Beijing Aeonmed

Beyond Medical

Inspired Medical (Vincent Medical)

Shenzhen Mindray Bio-Medical

Shenzhen Comen Medical Instruments

Awakzon Medical (Jiangsu)

Guangzhou Hypnus Healthcare

Telesair

Shenzhen Northern Meditec

### **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Medical High-Flow Humidified Oxygen Therapy Device market?

What factors are driving Medical High-Flow Humidified Oxygen Therapy Device market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Medical High-Flow Humidified Oxygen Therapy Device market opportunities vary by end market size?

How does Medical High-Flow Humidified Oxygen Therapy Device break out by Type, by Application?

## Contents

### 1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

### 2 EXECUTIVE SUMMARY

#### 2.1 World Market Overview

2.1.1 Global Medical High-Flow Humidified Oxygen Therapy Device Annual Sales 2021-2032

2.1.2 World Current & Future Analysis for Medical High-Flow Humidified Oxygen Therapy Device by Geographic Region, 2021, 2025 & 2032

2.1.3 World Current & Future Analysis for Medical High-Flow Humidified Oxygen Therapy Device by Country/Region, 2021, 2025 & 2032

#### 2.2 Medical High-Flow Humidified Oxygen Therapy Device Segment by Type

2.2.1 Manual Oxygen Adjustment

2.2.2 Automatic Oxygen Regulation

2.2.3 Medical High-Flow Humidified Oxygen Therapy Device Sales by Type

2.2.3.1 Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Type (2021-2026)

2.2.3.2 Global Medical High-Flow Humidified Oxygen Therapy Device Revenue and Market Share by Type (2021-2026)

2.2.3.3 Global Medical High-Flow Humidified Oxygen Therapy Device Sale Price by Type (2021-2026)

#### 2.3 Medical High-Flow Humidified Oxygen Therapy Device Segment by Maximum Flow Rate

2.3.1 Maximum Flow Rate: 60L/min

2.3.2 Maximum Flow Rate: 80L/min

2.3.3 Other

2.3.4 Medical High-Flow Humidified Oxygen Therapy Device Sales by Maximum Flow Rate

2.3.4.1 Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Maximum Flow Rate (2021-2026)

2.3.4.2 Global Medical High-Flow Humidified Oxygen Therapy Device Revenue and Market Share by Maximum Flow Rate (2021-2026)

2.3.4.3 Global Medical High-Flow Humidified Oxygen Therapy Device Sale Price by Maximum Flow Rate (2021-2026)

2.4 Medical High-Flow Humidified Oxygen Therapy Device Segment by Patient Populations

2.4.1 Neonatal & Pediatric

2.4.2 Adults

2.4.3 Medical High-Flow Humidified Oxygen Therapy Device Sales by Patient Populations

2.4.3.1 Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Patient Populations (2021-2026)

2.4.3.2 Global Medical High-Flow Humidified Oxygen Therapy Device Revenue and Market Share by Patient Populations (2021-2026)

2.4.3.3 Global Medical High-Flow Humidified Oxygen Therapy Device Sale Price by Patient Populations (2021-2026)

2.5 Medical High-Flow Humidified Oxygen Therapy Device Segment by Application

2.5.1 Hospital Use

2.5.2 Homecare

2.5.3 Medical High-Flow Humidified Oxygen Therapy Device Sales by Application

2.5.3.1 Global Medical High-Flow Humidified Oxygen Therapy Device Sale Market Share by Application (2021-2026)

2.5.3.2 Global Medical High-Flow Humidified Oxygen Therapy Device Revenue and Market Share by Application (2021-2026)

2.5.3.3 Global Medical High-Flow Humidified Oxygen Therapy Device Sale Price by Application (2021-2026)

### **3 GLOBAL BY COMPANY**

3.1 Global Medical High-Flow Humidified Oxygen Therapy Device Breakdown Data by Company

3.1.1 Global Medical High-Flow Humidified Oxygen Therapy Device Annual Sales by Company (2021-2026)

3.1.2 Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Company (2021-2026)

3.2 Global Medical High-Flow Humidified Oxygen Therapy Device Annual Revenue by Company (2021-2026)

- 3.2.1 Global Medical High-Flow Humidified Oxygen Therapy Device Revenue by Company (2021-2026)
- 3.2.2 Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Company (2021-2026)
- 3.3 Global Medical High-Flow Humidified Oxygen Therapy Device Sale Price by Company
- 3.4 Key Manufacturers Medical High-Flow Humidified Oxygen Therapy Device Producing Area Distribution, Sales Area, Product Type
  - 3.4.1 Key Manufacturers Medical High-Flow Humidified Oxygen Therapy Device Product Location Distribution
  - 3.4.2 Players Medical High-Flow Humidified Oxygen Therapy Device Products Offered
- 3.5 Market Concentration Rate Analysis
  - 3.5.1 Competition Landscape Analysis
  - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

## **4 WORLD HISTORIC REVIEW FOR MEDICAL HIGH-FLOW HUMIDIFIED OXYGEN THERAPY DEVICE BY GEOGRAPHIC REGION**

- 4.1 World Historic Medical High-Flow Humidified Oxygen Therapy Device Market Size by Geographic Region (2021-2026)
  - 4.1.1 Global Medical High-Flow Humidified Oxygen Therapy Device Annual Sales by Geographic Region (2021-2026)
  - 4.1.2 Global Medical High-Flow Humidified Oxygen Therapy Device Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Medical High-Flow Humidified Oxygen Therapy Device Market Size by Country/Region (2021-2026)
  - 4.2.1 Global Medical High-Flow Humidified Oxygen Therapy Device Annual Sales by Country/Region (2021-2026)
  - 4.2.2 Global Medical High-Flow Humidified Oxygen Therapy Device Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Medical High-Flow Humidified Oxygen Therapy Device Sales Growth
- 4.4 APAC Medical High-Flow Humidified Oxygen Therapy Device Sales Growth
- 4.5 Europe Medical High-Flow Humidified Oxygen Therapy Device Sales Growth
- 4.6 Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales Growth

## **5 AMERICAS**

## 5.1 Americas Medical High-Flow Humidified Oxygen Therapy Device Sales by Country

5.1.1 Americas Medical High-Flow Humidified Oxygen Therapy Device Sales by Country (2021-2026)

5.1.2 Americas Medical High-Flow Humidified Oxygen Therapy Device Revenue by Country (2021-2026)

5.2 Americas Medical High-Flow Humidified Oxygen Therapy Device Sales by Type (2021-2026)

5.3 Americas Medical High-Flow Humidified Oxygen Therapy Device Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

## 6 APAC

6.1 APAC Medical High-Flow Humidified Oxygen Therapy Device Sales by Region

6.1.1 APAC Medical High-Flow Humidified Oxygen Therapy Device Sales by Region (2021-2026)

6.1.2 APAC Medical High-Flow Humidified Oxygen Therapy Device Revenue by Region (2021-2026)

6.2 APAC Medical High-Flow Humidified Oxygen Therapy Device Sales by Type (2021-2026)

6.3 APAC Medical High-Flow Humidified Oxygen Therapy Device Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

## 7 EUROPE

7.1 Europe Medical High-Flow Humidified Oxygen Therapy Device by Country

7.1.1 Europe Medical High-Flow Humidified Oxygen Therapy Device Sales by Country (2021-2026)

7.1.2 Europe Medical High-Flow Humidified Oxygen Therapy Device Revenue by Country (2021-2026)

7.2 Europe Medical High-Flow Humidified Oxygen Therapy Device Sales by Type (2021-2026)

7.3 Europe Medical High-Flow Humidified Oxygen Therapy Device Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

## **8 MIDDLE EAST & AFRICA**

8.1 Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device by Country

8.1.1 Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales by Country (2021-2026)

8.1.2 Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Revenue by Country (2021-2026)

8.2 Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales by Type (2021-2026)

8.3 Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

## **9 MARKET DRIVERS, CHALLENGES AND TRENDS**

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

## **10 MANUFACTURING COST STRUCTURE ANALYSIS**

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Medical High-Flow Humidified Oxygen Therapy Device

10.3 Manufacturing Process Analysis of Medical High-Flow Humidified Oxygen Therapy Device

10.4 Industry Chain Structure of Medical High-Flow Humidified Oxygen Therapy Device

## **11 MARKETING, DISTRIBUTORS AND CUSTOMER**

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Medical High-Flow Humidified Oxygen Therapy Device Distributors

11.3 Medical High-Flow Humidified Oxygen Therapy Device Customer

## **12 WORLD FORECAST REVIEW FOR MEDICAL HIGH-FLOW HUMIDIFIED OXYGEN THERAPY DEVICE BY GEOGRAPHIC REGION**

12.1 Global Medical High-Flow Humidified Oxygen Therapy Device Market Size Forecast by Region

12.1.1 Global Medical High-Flow Humidified Oxygen Therapy Device Forecast by Region (2027-2032)

12.1.2 Global Medical High-Flow Humidified Oxygen Therapy Device Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Medical High-Flow Humidified Oxygen Therapy Device Forecast by Type (2027-2032)

12.7 Global Medical High-Flow Humidified Oxygen Therapy Device Forecast by Application (2027-2032)

## **13 KEY PLAYERS ANALYSIS**

13.1 Fisher & Paykel Healthcare

13.1.1 Fisher & Paykel Healthcare Company Information

13.1.2 Fisher & Paykel Healthcare Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.1.3 Fisher & Paykel Healthcare Medical High-Flow Humidified Oxygen Therapy

## Device Sales, Revenue, Price and Gross Margin (2021-2026)

### 13.1.4 Fisher & Paykel Healthcare Main Business Overview

### 13.1.5 Fisher & Paykel Healthcare Latest Developments

## 13.2 RMS Medical

### 13.2.1 RMS Medical Company Information

### 13.2.2 RMS Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

### 13.2.3 RMS Medical Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

### 13.2.4 RMS Medical Main Business Overview

### 13.2.5 RMS Medical Latest Developments

## 13.3 TNI medical (Masimo)

### 13.3.1 TNI medical (Masimo) Company Information

### 13.3.2 TNI medical (Masimo) Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

### 13.3.3 TNI medical (Masimo) Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

### 13.3.4 TNI medical (Masimo) Main Business Overview

### 13.3.5 TNI medical (Masimo) Latest Developments

## 13.4 Micomme Medical

### 13.4.1 Micomme Medical Company Information

### 13.4.2 Micomme Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

### 13.4.3 Micomme Medical Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

### 13.4.4 Micomme Medical Main Business Overview

### 13.4.5 Micomme Medical Latest Developments

## 13.5 Medline Industries (Teleflex)

### 13.5.1 Medline Industries (Teleflex) Company Information

### 13.5.2 Medline Industries (Teleflex) Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

### 13.5.3 Medline Industries (Teleflex) Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

### 13.5.4 Medline Industries (Teleflex) Main Business Overview

### 13.5.5 Medline Industries (Teleflex) Latest Developments

## 13.6 Vapotherm

### 13.6.1 Vapotherm Company Information

### 13.6.2 Vapotherm Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.6.3 Vapotherm Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Vapotherm Main Business Overview

13.6.5 Vapotherm Latest Developments

13.7 Armstrong Medical

13.7.1 Armstrong Medical Company Information

13.7.2 Armstrong Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.7.3 Armstrong Medical Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Armstrong Medical Main Business Overview

13.7.5 Armstrong Medical Latest Developments

13.8 Drägerwerk

13.8.1 Drägerwerk Company Information

13.8.2 Drägerwerk Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.8.3 Drägerwerk Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Drägerwerk Main Business Overview

13.8.5 Drägerwerk Latest Developments

13.9 BMC Medical

13.9.1 BMC Medical Company Information

13.9.2 BMC Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.9.3 BMC Medical Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 BMC Medical Main Business Overview

13.9.5 BMC Medical Latest Developments

13.10 Hamilton Medical

13.10.1 Hamilton Medical Company Information

13.10.2 Hamilton Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.10.3 Hamilton Medical Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Hamilton Medical Main Business Overview

13.10.5 Hamilton Medical Latest Developments

13.11 Great Group Medical

13.11.1 Great Group Medical Company Information

13.11.2 Great Group Medical Medical High-Flow Humidified Oxygen Therapy Device

## Product Portfolios and Specifications

13.11.3 Great Group Medical Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Great Group Medical Main Business Overview

13.11.5 Great Group Medical Latest Developments

## 13.12 Yuwell

13.12.1 Yuwell Company Information

13.12.2 Yuwell Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.12.3 Yuwell Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Yuwell Main Business Overview

13.12.5 Yuwell Latest Developments

## 13.13 Talent Medical Electronics

13.13.1 Talent Medical Electronics Company Information

13.13.2 Talent Medical Electronics Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.13.3 Talent Medical Electronics Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Talent Medical Electronics Main Business Overview

13.13.5 Talent Medical Electronics Latest Developments

## 13.14 Beijing Aeonmed

13.14.1 Beijing Aeonmed Company Information

13.14.2 Beijing Aeonmed Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.14.3 Beijing Aeonmed Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Beijing Aeonmed Main Business Overview

13.14.5 Beijing Aeonmed Latest Developments

## 13.15 Beyond Medical

13.15.1 Beyond Medical Company Information

13.15.2 Beyond Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.15.3 Beyond Medical Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Beyond Medical Main Business Overview

13.15.5 Beyond Medical Latest Developments

## 13.16 Inspired Medical (Vincent Medical)

13.16.1 Inspired Medical (Vincent Medical) Company Information

13.16.2 Inspired Medical (Vincent Medical) Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.16.3 Inspired Medical (Vincent Medical) Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Inspired Medical (Vincent Medical) Main Business Overview

13.16.5 Inspired Medical (Vincent Medical) Latest Developments

13.17 Shenzhen Mindray Bio-Medical

13.17.1 Shenzhen Mindray Bio-Medical Company Information

13.17.2 Shenzhen Mindray Bio-Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.17.3 Shenzhen Mindray Bio-Medical Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Shenzhen Mindray Bio-Medical Main Business Overview

13.17.5 Shenzhen Mindray Bio-Medical Latest Developments

13.18 Shenzhen Comen Medical Instruments

13.18.1 Shenzhen Comen Medical Instruments Company Information

13.18.2 Shenzhen Comen Medical Instruments Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.18.3 Shenzhen Comen Medical Instruments Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Shenzhen Comen Medical Instruments Main Business Overview

13.18.5 Shenzhen Comen Medical Instruments Latest Developments

13.19 Awakzon Medical (Jiangsu)

13.19.1 Awakzon Medical (Jiangsu) Company Information

13.19.2 Awakzon Medical (Jiangsu) Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.19.3 Awakzon Medical (Jiangsu) Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Awakzon Medical (Jiangsu) Main Business Overview

13.19.5 Awakzon Medical (Jiangsu) Latest Developments

13.20 Guangzhou Hypnus Healthcare

13.20.1 Guangzhou Hypnus Healthcare Company Information

13.20.2 Guangzhou Hypnus Healthcare Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

13.20.3 Guangzhou Hypnus Healthcare Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Guangzhou Hypnus Healthcare Main Business Overview

13.20.5 Guangzhou Hypnus Healthcare Latest Developments

13.21 Telesair

- 13.21.1 Telesair Company Information
- 13.21.2 Telesair Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications
- 13.21.3 Telesair Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.21.4 Telesair Main Business Overview
- 13.21.5 Telesair Latest Developments
- 13.22 Shenzhen Northern Meditec
  - 13.22.1 Shenzhen Northern Meditec Company Information
  - 13.22.2 Shenzhen Northern Meditec Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications
  - 13.22.3 Shenzhen Northern Meditec Medical High-Flow Humidified Oxygen Therapy Device Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.22.4 Shenzhen Northern Meditec Main Business Overview
  - 13.22.5 Shenzhen Northern Meditec Latest Developments

## **14 RESEARCH FINDINGS AND CONCLUSION**

## List Of Tables

### LIST OF TABLES

- Table 1. Medical High-Flow Humidified Oxygen Therapy Device Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Medical High-Flow Humidified Oxygen Therapy Device Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Manual Oxygen Adjustment
- Table 4. Major Players of Automatic Oxygen Regulation
- Table 5. Global Medical High-Flow Humidified Oxygen Therapy Device Sales by Type (2021-2026) & (Units)
- Table 6. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Type (2021-2026)
- Table 7. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue by Type (2021-2026) & (\$ million)
- Table 8. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Type (2021-2026)
- Table 9. Global Medical High-Flow Humidified Oxygen Therapy Device Sale Price by Type (2021-2026) & (US\$/Unit)
- Table 10. Major Players of Maximum Flow Rate: 60L/min
- Table 11. Major Players of Maximum Flow Rate: 80L/min
- Table 12. Major Players of Other
- Table 13. Global Medical High-Flow Humidified Oxygen Therapy Device Sales by Maximum Flow Rate (2021-2026) & (Units)
- Table 14. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Maximum Flow Rate (2021-2026)
- Table 15. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue by Maximum Flow Rate (2021-2026) & (\$ million)
- Table 16. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Maximum Flow Rate (2021-2026)
- Table 17. Global Medical High-Flow Humidified Oxygen Therapy Device Sale Price by Maximum Flow Rate (2021-2026) & (US\$/Unit)
- Table 18. Major Players of Neonatal & Pediatric
- Table 19. Major Players of Adults
- Table 20. Global Medical High-Flow Humidified Oxygen Therapy Device Sales by Patient Populations (2021-2026) & (Units)
- Table 21. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Patient Populations (2021-2026)

Table 22. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue by Patient Populations (2021-2026) & (\$ million)

Table 23. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Patient Populations (2021-2026)

Table 24. Global Medical High-Flow Humidified Oxygen Therapy Device Sale Price by Patient Populations (2021-2026) & (US\$/Unit)

Table 25. Global Medical High-Flow Humidified Oxygen Therapy Device Sale by Application (2021-2026) & (Units)

Table 26. Global Medical High-Flow Humidified Oxygen Therapy Device Sale Market Share by Application (2021-2026)

Table 27. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue by Application (2021-2026) & (\$ million)

Table 28. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Application (2021-2026)

Table 29. Global Medical High-Flow Humidified Oxygen Therapy Device Sale Price by Application (2021-2026) & (US\$/Unit)

Table 30. Global Medical High-Flow Humidified Oxygen Therapy Device Sales by Company (2021-2026) & (Units)

Table 31. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Company (2021-2026)

Table 32. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue by Company (2021-2026) & (\$ millions)

Table 33. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Company (2021-2026)

Table 34. Global Medical High-Flow Humidified Oxygen Therapy Device Sale Price by Company (2021-2026) & (US\$/Unit)

Table 35. Key Manufacturers Medical High-Flow Humidified Oxygen Therapy Device Producing Area Distribution and Sales Area

Table 36. Players Medical High-Flow Humidified Oxygen Therapy Device Products Offered

Table 37. Medical High-Flow Humidified Oxygen Therapy Device Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 38. New Products and Potential Entrants

Table 39. Market M&A Activity & Strategy

Table 40. Global Medical High-Flow Humidified Oxygen Therapy Device Sales by Geographic Region (2021-2026) & (Units)

Table 41. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share Geographic Region (2021-2026)

Table 42. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue by

Geographic Region (2021-2026) & (\$ millions)

Table 43. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Geographic Region (2021-2026)

Table 44. Global Medical High-Flow Humidified Oxygen Therapy Device Sales by Country/Region (2021-2026) & (Units)

Table 45. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Country/Region (2021-2026)

Table 46. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue by Country/Region (2021-2026) & (\$ millions)

Table 47. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Country/Region (2021-2026)

Table 48. Americas Medical High-Flow Humidified Oxygen Therapy Device Sales by Country (2021-2026) & (Units)

Table 49. Americas Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Country (2021-2026)

Table 50. Americas Medical High-Flow Humidified Oxygen Therapy Device Revenue by Country (2021-2026) & (\$ millions)

Table 51. Americas Medical High-Flow Humidified Oxygen Therapy Device Sales by Type (2021-2026) & (Units)

Table 52. Americas Medical High-Flow Humidified Oxygen Therapy Device Sales by Application (2021-2026) & (Units)

Table 53. APAC Medical High-Flow Humidified Oxygen Therapy Device Sales by Region (2021-2026) & (Units)

Table 54. APAC Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Region (2021-2026)

Table 55. APAC Medical High-Flow Humidified Oxygen Therapy Device Revenue by Region (2021-2026) & (\$ millions)

Table 56. APAC Medical High-Flow Humidified Oxygen Therapy Device Sales by Type (2021-2026) & (Units)

Table 57. APAC Medical High-Flow Humidified Oxygen Therapy Device Sales by Application (2021-2026) & (Units)

Table 58. Europe Medical High-Flow Humidified Oxygen Therapy Device Sales by Country (2021-2026) & (Units)

Table 59. Europe Medical High-Flow Humidified Oxygen Therapy Device Revenue by Country (2021-2026) & (\$ millions)

Table 60. Europe Medical High-Flow Humidified Oxygen Therapy Device Sales by Type (2021-2026) & (Units)

Table 61. Europe Medical High-Flow Humidified Oxygen Therapy Device Sales by Application (2021-2026) & (Units)

- Table 62. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales by Country (2021-2026) & (Units)
- Table 63. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Country (2021-2026)
- Table 64. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales by Type (2021-2026) & (Units)
- Table 65. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales by Application (2021-2026) & (Units)
- Table 66. Key Market Drivers & Growth Opportunities of Medical High-Flow Humidified Oxygen Therapy Device
- Table 67. Key Market Challenges & Risks of Medical High-Flow Humidified Oxygen Therapy Device
- Table 68. Key Industry Trends of Medical High-Flow Humidified Oxygen Therapy Device
- Table 69. Medical High-Flow Humidified Oxygen Therapy Device Raw Material
- Table 70. Key Suppliers of Raw Materials
- Table 71. Medical High-Flow Humidified Oxygen Therapy Device Distributors List
- Table 72. Medical High-Flow Humidified Oxygen Therapy Device Customer List
- Table 73. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Forecast by Region (2027-2032) & (Units)
- Table 74. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 75. Americas Medical High-Flow Humidified Oxygen Therapy Device Sales Forecast by Country (2027-2032) & (Units)
- Table 76. Americas Medical High-Flow Humidified Oxygen Therapy Device Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 77. APAC Medical High-Flow Humidified Oxygen Therapy Device Sales Forecast by Region (2027-2032) & (Units)
- Table 78. APAC Medical High-Flow Humidified Oxygen Therapy Device Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 79. Europe Medical High-Flow Humidified Oxygen Therapy Device Sales Forecast by Country (2027-2032) & (Units)
- Table 80. Europe Medical High-Flow Humidified Oxygen Therapy Device Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 81. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales Forecast by Country (2027-2032) & (Units)
- Table 82. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 83. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Forecast

by Type (2027-2032) & (Units)

Table 84. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 85. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Forecast by Application (2027-2032) & (Units)

Table 86. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 87. Fisher & Paykel Healthcare Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 88. Fisher & Paykel Healthcare Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 89. Fisher & Paykel Healthcare Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 90. Fisher & Paykel Healthcare Main Business

Table 91. Fisher & Paykel Healthcare Latest Developments

Table 92. RMS Medical Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 93. RMS Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 94. RMS Medical Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 95. RMS Medical Main Business

Table 96. RMS Medical Latest Developments

Table 97. TNI medical (Masimo) Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 98. TNI medical (Masimo) Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 99. TNI medical (Masimo) Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 100. TNI medical (Masimo) Main Business

Table 101. TNI medical (Masimo) Latest Developments

Table 102. Micomme Medical Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 103. Micomme Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 104. Micomme Medical Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 105. Micomme Medical Main Business

Table 106. Micomme Medical Latest Developments

Table 107. Medline Industries (Teleflex) Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 108. Medline Industries (Teleflex) Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 109. Medline Industries (Teleflex) Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 110. Medline Industries (Teleflex) Main Business

Table 111. Medline Industries (Teleflex) Latest Developments

Table 112. Vapotherm Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 113. Vapotherm Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 114. Vapotherm Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 115. Vapotherm Main Business

Table 116. Vapotherm Latest Developments

Table 117. Armstrong Medical Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 118. Armstrong Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 119. Armstrong Medical Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 120. Armstrong Medical Main Business

Table 121. Armstrong Medical Latest Developments

Table 122. Drägerwerk Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 123. Drägerwerk Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 124. Drägerwerk Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 125. Drägerwerk Main Business

Table 126. Drägerwerk Latest Developments

Table 127. BMC Medical Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 128. BMC Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 129. BMC Medical Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 130. BMC Medical Main Business

Table 131. BMC Medical Latest Developments

Table 132. Hamilton Medical Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 133. Hamilton Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 134. Hamilton Medical Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 135. Hamilton Medical Main Business

Table 136. Hamilton Medical Latest Developments

Table 137. Great Group Medical Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 138. Great Group Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 139. Great Group Medical Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 140. Great Group Medical Main Business

Table 141. Great Group Medical Latest Developments

Table 142. Yuwell Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 143. Yuwell Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 144. Yuwell Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 145. Yuwell Main Business

Table 146. Yuwell Latest Developments

Table 147. Talent Medical Electronics Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 148. Talent Medical Electronics Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 149. Talent Medical Electronics Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 150. Talent Medical Electronics Main Business

Table 151. Talent Medical Electronics Latest Developments

Table 152. Beijing Aeonmed Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 153. Beijing Aeonmed Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 154. Beijing Aeonmed Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 155. Beijing Aeonmed Main Business

Table 156. Beijing Aeonmed Latest Developments

Table 157. Beyond Medical Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 158. Beyond Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 159. Beyond Medical Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 160. Beyond Medical Main Business

Table 161. Beyond Medical Latest Developments

Table 162. Inspired Medical (Vincent Medical) Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 163. Inspired Medical (Vincent Medical) Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 164. Inspired Medical (Vincent Medical) Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 165. Inspired Medical (Vincent Medical) Main Business

Table 166. Inspired Medical (Vincent Medical) Latest Developments

Table 167. Shenzhen Mindray Bio-Medical Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 168. Shenzhen Mindray Bio-Medical Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

Table 169. Shenzhen Mindray Bio-Medical Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 170. Shenzhen Mindray Bio-Medical Main Business

Table 171. Shenzhen Mindray Bio-Medical Latest Developments

Table 172. Shenzhen Comen Medical Instruments Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors

Table 173. Shenzhen Comen Medical Instruments Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications

- Table 174. Shenzhen Comen Medical Instruments Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
- Table 175. Shenzhen Comen Medical Instruments Main Business
- Table 176. Shenzhen Comen Medical Instruments Latest Developments
- Table 177. Awakzon Medical (Jiangsu) Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors
- Table 178. Awakzon Medical (Jiangsu) Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications
- Table 179. Awakzon Medical (Jiangsu) Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
- Table 180. Awakzon Medical (Jiangsu) Main Business
- Table 181. Awakzon Medical (Jiangsu) Latest Developments
- Table 182. Guangzhou Hypnus Healthcare Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors
- Table 183. Guangzhou Hypnus Healthcare Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications
- Table 184. Guangzhou Hypnus Healthcare Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
- Table 185. Guangzhou Hypnus Healthcare Main Business
- Table 186. Guangzhou Hypnus Healthcare Latest Developments
- Table 187. Telesair Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors
- Table 188. Telesair Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications
- Table 189. Telesair Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
- Table 190. Telesair Main Business
- Table 191. Telesair Latest Developments
- Table 192. Shenzhen Northern Meditec Basic Information, Medical High-Flow Humidified Oxygen Therapy Device Manufacturing Base, Sales Area and Its Competitors
- Table 193. Shenzhen Northern Meditec Medical High-Flow Humidified Oxygen Therapy Device Product Portfolios and Specifications
- Table 194. Shenzhen Northern Meditec Medical High-Flow Humidified Oxygen Therapy Device Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin

(2021-2026)

Table 195. Shenzhen Northern Meditec Main Business

Table 196. Shenzhen Northern Meditec Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of Medical High-Flow Humidified Oxygen Therapy Device
- Figure 2. Medical High-Flow Humidified Oxygen Therapy Device Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Medical High-Flow Humidified Oxygen Therapy Device Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Country/Region (2025)
- Figure 10. Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Manual Oxygen Adjustment
- Figure 12. Product Picture of Automatic Oxygen Regulation
- Figure 13. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Type in 2026
- Figure 14. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of Maximum Flow Rate: 60L/min
- Figure 16. Product Picture of Maximum Flow Rate: 80L/min
- Figure 17. Product Picture of Other
- Figure 18. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Maximum Flow Rate in 2026
- Figure 19. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Maximum Flow Rate (2021-2026)
- Figure 20. Product Picture of Neonatal & Pediatric
- Figure 21. Product Picture of Adults
- Figure 22. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Patient Populations in 2026
- Figure 23. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Patient Populations (2021-2026)

Figure 24. Medical High-Flow Humidified Oxygen Therapy Device Consumed in Hospital Use

Figure 25. Global Medical High-Flow Humidified Oxygen Therapy Device Market: Hospital Use (2021-2026) & (Units)

Figure 26. Medical High-Flow Humidified Oxygen Therapy Device Consumed in Homecare

Figure 27. Global Medical High-Flow Humidified Oxygen Therapy Device Market: Homecare (2021-2026) & (Units)

Figure 28. Global Medical High-Flow Humidified Oxygen Therapy Device Sale Market Share by Application (2025)

Figure 29. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Application in 2026

Figure 30. Medical High-Flow Humidified Oxygen Therapy Device Sales by Company in 2026 (Units)

Figure 31. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Company in 2026

Figure 32. Medical High-Flow Humidified Oxygen Therapy Device Revenue by Company in 2026 (\$ millions)

Figure 33. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Company in 2026

Figure 34. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Geographic Region (2021-2026)

Figure 35. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Geographic Region in 2026

Figure 36. Americas Medical High-Flow Humidified Oxygen Therapy Device Sales 2021-2026 (Units)

Figure 37. Americas Medical High-Flow Humidified Oxygen Therapy Device Revenue 2021-2026 (\$ millions)

Figure 38. APAC Medical High-Flow Humidified Oxygen Therapy Device Sales 2021-2026 (Units)

Figure 39. APAC Medical High-Flow Humidified Oxygen Therapy Device Revenue 2021-2026 (\$ millions)

Figure 40. Europe Medical High-Flow Humidified Oxygen Therapy Device Sales 2021-2026 (Units)

Figure 41. Europe Medical High-Flow Humidified Oxygen Therapy Device Revenue 2021-2026 (\$ millions)

Figure 42. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales 2021-2026 (Units)

Figure 43. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device

Revenue 2021-2026 (\$ millions)

Figure 44. Americas Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Country in 2026

Figure 45. Americas Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Country (2021-2026)

Figure 46. Americas Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Type (2021-2026)

Figure 47. Americas Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Application (2021-2026)

Figure 48. United States Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 49. Canada Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 50. Mexico Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 51. Brazil Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 52. APAC Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Region in 2026

Figure 53. APAC Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Region (2021-2026)

Figure 54. APAC Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Type (2021-2026)

Figure 55. APAC Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Application (2021-2026)

Figure 56. China Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 57. Japan Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 58. South Korea Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 59. Southeast Asia Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 60. India Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 61. Australia Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 62. China Taiwan Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 63. Europe Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Country in 2026

Figure 64. Europe Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share by Country (2021-2026)

Figure 65. Europe Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Type (2021-2026)

Figure 66. Europe Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Application (2021-2026)

Figure 67. Germany Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 68. France Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 69. UK Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 70. Italy Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 71. Russia Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 72. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Country (2021-2026)

Figure 73. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Type (2021-2026)

Figure 74. Middle East & Africa Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share by Application (2021-2026)

Figure 75. Egypt Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 76. South Africa Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 77. Israel Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 78. Turkey Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 79. GCC Countries Medical High-Flow Humidified Oxygen Therapy Device Revenue Growth 2021-2026 (\$ millions)

Figure 80. Manufacturing Cost Structure Analysis of Medical High-Flow Humidified Oxygen Therapy Device in 2026

Figure 81. Manufacturing Process Analysis of Medical High-Flow Humidified Oxygen Therapy Device

Figure 82. Industry Chain Structure of Medical High-Flow Humidified Oxygen Therapy

## Device

Figure 83. Channels of Distribution

Figure 84. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Forecast by Region (2027-2032)

Figure 85. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share Forecast by Region (2027-2032)

Figure 86. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share Forecast by Type (2027-2032)

Figure 87. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share Forecast by Type (2027-2032)

Figure 88. Global Medical High-Flow Humidified Oxygen Therapy Device Sales Market Share Forecast by Application (2027-2032)

Figure 89. Global Medical High-Flow Humidified Oxygen Therapy Device Revenue Market Share Forecast by Application (2027-2032)

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