Capnography Equipment Market by Product (Multiparameter & Standalone Capnometer, Accessories), Technology (Mainstream, Sidestream, Microstream), Application (Cardiac Care, Trauma, Emergency Care), End User (Hospital) - Global Forecast to 2027

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Abstracts

The global capnography equipment market is expected to reach USD 436 million by 2027 from an estimated USD 334 million in 2021, at a CAGR of 4.6% from 2022 to 2027. Capnography equipment is used to measure the CO2 levels in patients while they are anesthetized or sedated by healthcare professionals. A capnometer is an essential monitor that estimates arterial carbon dioxide in patients without blood samples. Market growth is mainly driven by the development of portable/POC capnography devices, clinical benefits of capnography equipment over pulse oximetry, and increasing number of surgeries. In addition, healthcare industry in emerging countries are expected to offer growth opportunities for players in the capnography equipment market. In addition, in the early stages, healthcare professionals can identify potential breathing complications (such as airway obstruction, hyperventilation, hypoventilation, or apnea) through ventilation monitoring or capnograph evaluation of target subjects. Real-time measurement of various respiratory parameters helps healthcare professionals decide patient treatment options and enables timely intervention at the onset of an adverse respiratory event.

Capnography equipment is traditionally used for cardiology surgeries for patients under deep sedation and anesthesia. However, with the growing number of target patients for critical applications such as trauma and emergency cases, the demand for portable/point-of-care capnography equipment is expected to increase. In line with this

changing market trend, key market players are increasingly focusing on developing portable/point-of-care or handheld capnography equipment that can be used for such applications that require easy device mobility and patient access. However, issues related to stringent (especially in the US) and ambiguous regulatory guidelines for the approval of capnography medical devices are expected to hinder the growth of the capnography equipment market during the forecast period.

“The Capnometers segment accounted for the largest share of the capnography equipment market, by product type, in 2021”

Based on product, the capnography equipment market is categorized into two major segments, namely, capnometers and capnography accessories & disposables. Capnometers are divided into multiparameter & standalone categories, which are further segmented into handheld and conventional capnometers. Capnometers form the single largest segment, but capnography accessories & disposables hold the larger share of the market—52.5% in 2021. The increasing adoption of capnography equipment, recommendations for its use in patient monitoring, medical reimbursements for capnography equipment across developed countries, and the growing number of surgical procedures are driving the growth of the capnography accessories market.

“The Mainstream Capnography segment accounted for the largest share of the capnography equipment market, by technology, in 2021”

Based on technology, the capnography equipment market is segmented into mainstream, sidestream, and microstream. The mainstream capnography segment accounted for 67.4% of the capnography equipment market in 2021. The advantages associated with mainstream capnography, such as ease of use and the ability to monitor breathing in intubated patients accurately, are expected to drive the growth of this market segment during the study period.

“The Cardiac Surgeries segment, by application, accounted for the largest share of the global capnography equipment market in 2021”

Based on application, the capnography equipment market is segmented into cardiac surgeries, trauma & emergency care, respiratory monitoring, and other applications. In 2021, the cardiac surgeries segment held 40.5% of the capnography equipment applications market. The large share of this segment is attributed to the increasing regulatory guidelines recommending capnography for cardiac surgeries and the rising number of cardiopulmonary surgeries performed across the globe.

“On the basis of End Users, Hospitals segment accounted for the largest share of the global capnography equipment market, in 2021”

Based on end users, the capnography equipment market is segmented into hospitals, ambulatory surgery centers & home care, and other end users. Hospitals dominate the capnography equipment market, with a share of 82.3% in 2021. This segment is projected to reach USD 358.6 million by 2027 from USD 275.1 million in 2021, at a CAGR of 4.5% during the forecast period. Factors such as evolving guidelines related to the use of capnography and the rising incidence of chronic disorders are expected to drive the demand for capnography equipment in hospital settings in the coming years.

“The Asia Pacific market is expected to grow at the highest CAGR during the forecast period”

The global capnography equipment market is segmented into North America (comprising the US and Canada), Europe (includes Germany, France, and the UK), the Asia Pacific (includes Japan, China, India), Latin America (Brazil, Mexico), and the Middle East & Africa. North America holds the largest share of the global capnography equipment market. Growth in this market is attributed to the significant adoption of capnography monitoring, the large patient population for target diseases, and the strong presence of device manufacturers in the region. On the other hand, the Asia Pacific market is estimated to register the highest growth rate during the forecast period. This can primarily be attributed to the presence of a large patient population base for target diseases in this region, increasing adoption of patient monitoring devices, and growing trend of medical tourism across RoAPAC countries.

A breakdown of the primary participants referred to for this report is provided below:

By Company Type: Tier 1–45%, Tier 2–34%, and Tier 3– 21%

By Designation: C-level–47%, Director-level–33%, and Others–20%

By Region: North America–35%, Europe–32%, Asia Pacific–25%, Latin America–6%, and the Middle East & Africa–2%

As of 2020, the capnography equipment market is dominated by Becton, Dickinson, and Company (US), Dr?gerwerk AG & Co. KGaA (Germany), GE Healthcare (General

Electric Company), Koninklijke Philips N.V. (Netherlands), and Medtronic plc (Ireland). Other leading players are ZOLL Medical Corporation (Asahi Kasei) (Japan), Masimo Corporation (US), and Nihon Kohden (Japan).

Research Coverage

This report studies the capnography equipment market based on product type, technology, application, end user and region. It also covers the factors affecting market growth, analyzes the various opportunities and challenges in the market, and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micromarkets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to five main regions (and the respective countries in these regions).

Reasons to Buy the Report

The report will enable established firms as well as entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them to garner a larger market share. Firms purchasing the report could use one or a combination of the below-mentioned strategies for strengthening their market presence.

This report provides insights on the following pointers:

Market Penetration: Comprehensive information on the product portfolios offered by the top players in the capnography equipment market

Product Development/Innovation: Detailed insights on the upcoming trends, R&D activities, and product launches in the capnography equipment market

Market Development: Comprehensive information on lucrative emerging regions

Market Diversification: Exhaustive information about new products, growing geographies, and recent developments in the capnography equipment market

Competitive Assessment: In-depth assessment of market segments, growth strategies, revenue analysis, and products of the leading market players.

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