

Medical Gases and Equipment Market by Gases (Oxygen, Medical Air, Nitrogen, Nitrous-oxide, Helium, Blood-gas Mixture, Nitrous Oxide-Oxygen Mixture), by Equipment (Cylinders, Manifolds, Regulators, Flowmeters) - Global Forecast to 2018

<https://marketpublishers.com/r/MF6EFF34FF6EN.html>

Date: February 2014

Pages: 275

Price: US\$ 5,650.00 (Single User License)

ID: MF6EFF34FF6EN

Abstracts

The global medical gases and equipment market is estimated to be worth \$14,953 million by 2018.

The global medical gases and equipment market is segmented by product, end user, and geography. The medical gases and equipment market is mainly classified, by product into medical gases and equipment. It is further categorized by pure gases and by gas mixtures. The equipment market covers cylinders, vacuum systems, manifolds, regulators, suction regulators, flow meters, hoses, outlets, and monitoring systems. The report also discusses the key market drivers, restraints, and opportunities of the global medical gases and equipment market and its sub-markets.

The overall market is mainly driven by the rising ageing population and growing incidences of chronic diseases, which adds to the global disease burden. Growth in adoption of treatment in home care settings in lieu of government initiatives to curtail healthcare costs in various countries is also expected to propel the growth of the medical gases market. The markets across APAC and the Latin American region are largely driven by growing healthcare infrastructure in the region, increased affordability of healthcare services, and increase in the disposable. However, frequently changing regulatory policies and opposing reimbursement policies for respiratory therapies are expected to dampen the market growth to a certain extent.

By 2018, oxygen will continue to drive and dominate the medical gases market. A major

share of this growth can be attributed to the presence of a large patient base suffering from respiratory diseases such as COPD and sleep apnea syndrome and the increasing number of patients undergoing emergency medical care. Furthermore, cylinders are also expected to drive the growth of the medical gas equipment market. Driven by the growing home healthcare market, a majority of the players have begun manufacturing lightweight and portable cylinders with various visible and audible alert mechanisms. This will enhance patient safety in mobile oxygen therapy and address changing lifestyles. New, integrated cylinders are fast replacing the larger units due to their convenience of mobility and multi-functionality.

North America dominated the medical gases and equipment market in 2013 and will continue to drive and dominate it by 2018. However, the market share of this region will decrease to 39.6%, primarily due to the increase in demand for medical gases and equipment in the APAC and Latin American countries. A majority of the growth in the APAC region will primarily be driven by the increasing demand for medical gases and equipment in China and India. The growth in the APAC and Latin American regions can be attributed to increasing government support to improve healthcare infrastructure and increased disposable income, leading to growth in the per capita healthcare expenditure in these regions. However, low awareness levels and lack of proper distribution channels in this region restrain the growth of this market to a certain extent. The North American market is expected to grow at a higher pace than Europe mainly due to the rapidly increasing aging population and the high adoption rate of home healthcare services in the North American region.

The major players in the medical gases and equipment market include Air Products and Chemicals Inc (U.S.), Praxair Inc. (U.S.), Taiyo Nippon Sanso Corp. (Japan), SOL SpA (Italy), Airgas Inc (U.S.), Atlas Copco (Sweden), and Messer Group (Germany). Collectively, the top 10 players accounted for approximately 70% to 75% of the global medical gases and equipment market in 2012.

Linde Group (Germany) and Air Liquide (France) were the leading players, together accounting for around 50% to 55% of the market share in 2012. Linde Group has a diversified product portfolio, which includes a wide range of medical gases and equipment such as medical oxygen, nitrous oxide, medical nitrous oxide/oxygen mixtures, hospital equipment for hospitals, and home care and emergency care services. The company has a strong presence in more than 100 countries through its strong manufacturing and distribution facilities, which enables it to cater to a large customer base across the globe. The company focuses on strengthening and streamlining its product portfolio for the healthcare industry.

This report provides insights on the following pointers:

Market Penetration: Comprehensive information on product portfolios offered by top players in the medical gases and equipment market. The report analyzes the medical gases and equipment market by products, end-users, and geography

Product Development/Innovation: Detailed insights on upcoming trends, research and development activities, and new product launches in the medical gases and equipment market

Market Development: Comprehensive information about the lucrative emerging markets by product, end-user, and geography

Market Diversification: Exhaustive information about new products, growing regions, recent developments, and investments in the medical gases and equipment market

Competitive Assessment: In-depth assessment of market shares, growth strategies, products, distribution networks, manufacturing capabilities, and SWOT analyses of the leading players in the medical gases and equipment market

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