

Respiratory Care Devices Market by Product (Therapeutic (Ventilator, Mask, PAP Device, Inhaler, Nebulizer), Monitoring (Pulse Oximeter, Capnograph), Diagnostic, Consumables), End-User (Hospital, Home Care), Indication - Global Forecast to 2025

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Abstracts

“Outbreak of infectious diseases affecting the respiratory system is expected to drive market growth.”

The respiratory care devices market is expected to reach USD 29.9 billion by 2025 from USD 16.0 billion in 2019, at a CAGR of -12.5% during the forecast period of 2020 to 2025. Due to the outbreak of coronavirus globally, there is a sudden rise in the demand for respiratory care devices. Thus, the respiratory care devices market witnessed a CAGR of 261.1% between 2019 and 2020. In 2020, the respiratory care devices market reached USD 58.1 billion. The growth of this market is mainly attributed to the high prevalence of respiratory diseases, rising aging population across the globe, high prevalence of smoking, rising urbanization and pollution levels, increasing incidence of preterm births, and lifestyle changes. However, a lack of awareness—leading to a large underdiagnosed and undertreated population—and the harmful effects of specific respiratory care devices on neonates have hampered market growth to an extent.

“COPD was the largest and fastest-growing indication of respiratory care devices market in 2019.”

COPD is a medical term referring to a group of lung diseases, including chronic bronchitis and emphysema. It is an inflammatory and progressive life-threatening lung disease characterized by a persistent blockage of airflow from the lungs. One of the major causes of COPD is tobacco smoking. According to the US CDC, as many as

eight in 10 COPD-related deaths are due to smoking. Additionally, rising indoor (biomass fuel) and outdoor air pollution levels, exposure to dust and chemicals (vapors, irritants, and fumes), genetic disorders, and increasing geriatric population are other factors driving the prevalence of COPD. The elements, as mentioned above, are expected to drive the demand for respiratory care devices during the forecast period.

“Hospitals is the largest end-user segment in the respiratory care devices market in 2019”

Based on end-user, the respiratory care devices market is divided into hospitals, home care settings and ambulatory care. Hospitals form the largest end-user segment of the respiratory care devices market. This can largely be attributed to the financial capabilities of hospitals to purchase expensive equipment and the availability of trained professionals in hospitals to operate respiratory care devices. Hospitals provide respiratory care services to patients through various departments, such as intensive care units, emergency rooms, outpatient departments, and pulmonary diagnostic laboratories, among others. Moreover, COVID-19 has tremendously impacted the hospital segment. Several hospitals have been established in order to cure an increasing number of patients infected from the coronavirus.

“North America will continue to dominate the respiratory care devices market in 2025”

The respiratory care devices market is segmented into North America, Europe, the Asia Pacific, Latin America, and the Middle East & Africa. In 2019, North America accounted for the largest share of the respiratory care devices market. The large share of North America in this market can be attributed to the outbreak of COVID-19, which has driven the demand for respiratory devices in North America. Due to its growing geriatric population segment and environmental conditions that have favored the spread of the disease, COVID-19 has severely affected the region and ensured enormous growth in the demand for respiratory care devices. Players in this and adjacent, or even non-related, markets have focused on or collaborated for expanding the manufacturing of critical care instruments and respiratory care devices.

The break-down of primary participants is as mentioned below:

By Company Type - Tier 1: 40%, Tier 2: 25%, and Tier 3: 35%

By Designation - C-level: 33%, Director-level: 41%, and Others: 26%

By Region - North America: 38%, Europe: 32%, Asia Pacific: 23%, Latin America: 5%, and the Middle East & Africa: 2%

Philips Healthcare (Netherlands), ResMed Inc. (US), Medtronic plc (Ireland), Masimo Corporation (US), Fisher & Paykel Healthcare (New Zealand), Dräger AG (Germany), Invacare Corporation (US), Nihon Kohden (Japan), Getinge AB (Sweden), Air Liquide (France).

Research Coverage:

The report analyzes the respiratory care devices market and aims at estimating the market size and future growth potential of various market segments, based on type, indication, end user, and region. The report also provides a competitive analysis of the key players operating in this market, along with their company profiles, product offerings, recent developments, and key market strategies.

Reasons to Buy the Report

This report will enrich established firms as well as new entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them garner a greater share of the market. Firms purchasing the report could use one or a combination of the below-mentioned strategies to strengthen their positions in the market.

This report provides insights on:

Market Penetration: Comprehensive information on the product portfolios of the top players in the respiratory care devices market. The report analyzes this market by type, indication, end user, and region

Market Development: Comprehensive information on the lucrative emerging markets, by type, indication, end user, and region

Market Diversification: Exhaustive information about the product portfolios, growing geographies, recent developments, and investments in the respiratory care devices market

Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, and capabilities of the leading players in the

respiratory care devices market

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10.3.1.1 Increasing healthcare expenditure and strengthening of the healthcare infrastructure in Germany to drive market growth

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10.3.3.1 The UK market has registered a favorable increase in healthcare expenditure

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10.3.5.1 Increasing debt and shortcomings in Spain's medical devices sector will restrain the pace of market growth

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10.4.1 JAPAN

10.4.1.1 High accessibility of health services accounts for Japan's large market share

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10.4.2 CHINA

10.4.2.1 Healthcare development and reforms will stimulate market growth in China

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TABLE 553 CHINA: PAP DEVICES MARKET, BY TYPE, 2017–2019 (USD MILLION)

TABLE 554 CHINA: PAP DEVICES MARKET, BY TYPE, 2020–2025 (USD MILLION)

TABLE 555 CHINA: VENTILATORS MARKET, BY TYPE, 2017–2019 (USD MILLION)

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10.4.3 INDIA

10.4.3.1 Growth in the patient population, healthcare expenditure, and medical tourism will favor the adoption of respiratory care devices

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TABLE 603 INDIA: RESPIRATORY CARE CONSUMABLES & ACCESSORIES MARKET, BY TYPE, 2020–2025 (USD MILLION)

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TABLE 608 INDIA: RESPIRATORY CARE DEVICES MARKET, BY END USER, 2017–2019 (USD MILLION)

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TABLE 616 ROAPAC: VENTILATORS MARKET, BY TYPE, 2017–2019 (USD MILLION)

TABLE 617 ROAPAC: VENTILATORS MARKET, BY TYPE, 2020–2025 (USD MILLION)

TABLE 618 ROAPAC: ICU VENTILATORS MARKET, BY TYPE, 2017–2019 (USD MILLION)

TABLE 619 ROAPAC: ICU VENTILATORS MARKET, BY TYPE, 2020–2025 (USD MILLION)

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