

Sleep Apnea Devices Market, Global Forecast, Impact of COVID-19, Industry Trends by Device Type, Opportunity Company Overview, Revenue

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Abstracts

Sleep apnea is a sleeping sickness that can be undoubtedly serious, wherein an individual's breathing exhibits an irregular pattern. People with untreated sleep apnea encounter interrupted breathing in their sleep due to a shortage of oxygen dispense to the brain and the rest of the body parts. Today, sleep apnea is more common among elderly patients and people who are suffering from diabetes, hypertension, cardiovascular disorders. Further, to combat the condition named sleep apnea, the market has introduced equipment for managing sleeping apnea that facilitates breathing in patients suffering from sleep disorders. As per Renub Research Analysis, the Sleep Apnea Devices Market was valued at US\$ 5.2 Billion in 2020.

The increasing prevalence of obesity and the rising geriatric population leads to a higher incidence of sleep apnea globally. The rise in incidence manifests a large patient pool requiring diagnosis and treatment for sleep apnea, driving the market's growth. Ample provisions of undiagnosed patients, and government initiatives to promote diagnosis, are also expected to boost the demand for diagnostic devices and subsequently drive the market's growth during the forecast period. Thereon, it is likely that the Sleep Apnea Machines Market is expected to expand at a CAGR of 7.63% from 2020 - 2027.

Restraints of Sleep Apnea Devices Market

Certain determinants like the high cost associated with devices restrict the market's growth.

Similarly, in emerging countries like India, due to minimal medical coverage provided by public or private insurance companies, obstructs the development of the market in the region.

The lack of awareness concerning obstructive sleep apnea (OSA) in emerging countries is a vital factor expected to restrain the market's growth during the forecast period.

Device Type

In terms of device type, the global Sleep Apnea market is segmented into therapeutic devices and diagnostic devices. In the therapeutic device segment, Positive Airway Pressure (PAP) devices are the most common devices used to treat sleep apnea. For healthcare providers globally, amongst the PAP devices, Continuous Positive Airway Pressure (CPAP) devices are the favoured choice of therapy for OSA. The high potency of CPAP and other PAP devices in treating sleep apnea has been conducive to increase the adoption of therapeutic devices globally.

However, the diagnostic device segment is awaited to grow firm due to a large pool of undiagnosed patients and raising awareness about available diagnostic and treatment options for sleep apnea among the general population, especially in emerging countries.

Sleep Laboratories & Hospitals, and Home Care Setting

The market is segmented into Sleep Laboratories & Hospitals, and Home Care Setting/Individuals based on end-user. The rising adoption of therapeutic devices like CPAP and oral appliances are attributed to the market expansion of the Home Care Setting/Individuals Market. In addition, the increasing prevalence of sleep apnea, along with adequate reimbursement policies by the government for patients residing in the Home Care Setting/Individuals Market, is another significant factor supporting a higher percentage of patients being treated in these facilities. Contrarily, Sleep Laboratories & Hospitals amidst the pandemic suffered a market setback due to fewer patients being treated due to the nationwide lockdown.

Regional Analysis of Sleep Apnea Devices

Among different regions, North America dominates the global sleep apnea devices market due to the higher prevalence of sleep apnea and favourable reimbursement policies, which has been pivotal in the higher adoption of sleep apnea devices in the region. Diversely, the market of Europe is expected to grow due to soaring awareness about sleep apnea and the increasing need for diagnostic tests coupled with the high adoption of sleep apnea devices in the region. The Asia-Pacific market is forecasted to grow faster due to the rising demand for devices in countries like Japan, Australia and

the growing prevalence of sleep apnea in emerging countries.

Market Players Analysis

The sleep apnea devices market includes major players like CareFusion Corp. (Part of Becton, Dickinson and Company), Summed, Resmed, Imthera Medical, Inc. (Part of Livanova Plc), Koninklijke Philips N.V.

Besides, a diverse and robust portfolio of these players, along with the focus on R&D to introduce new devices and solid geographical existence, are factors primarily attributing to the dominance of these players in the global market.

Additionally, the market players also emphasize the introduction of technically advanced devices that will increase compliance by offering extreme comfort to the patient. Thus, growing advances and innovations by market players are expected to increase the adoption of sleep apnea devices in the forecast period. Thereafter, in the coming years, as per our estimate, the Sleep Apnea Devices Market Size will increase across the world to reach US\$ 8.7 Billion by 2027.

COVID-19 Pandemic Impacts on this Industry

The outbreak of the COVID-19 pandemic has rigorously affected the management of sleep apnea patients worldwide. Several medical organizations like the European Respiratory Society and the American Academy of Sleep Medicine have recommended using telehealth and has provided guidelines to all sleep centres to postpone and reschedule the in-laboratory administration of PAP therapy and polysomnography, except in emergency cases.

For instance, as stated by the data published by the European Respiratory Journal, it has been observed that before a pandemic, laboratory-based PSG was performed regularly around 92.5% of centres. However, now this procedure is being performed only in 20% of centres of Europe.

Also, laboratory-based CPAP or bi-level therapy has been practised in numerous centres, but now less than one-fifth of these centres continued this routine. Thus, a reduction in these procedures among sleep centres can result in a decline in the diagnosis of new sleep apnea patients during the COVID-19 pandemic and can negatively impact the growth of the sleep apnea market in 2020.

Renub Research report titled 'Sleep Apnea Devices Market, Global Forecast, by Types [Therapeutic (CPAP Sleep Apnea, Auto CPAP Sleep Apnea, BiPAP Sleep Apnea, Others), Diagnostics devices (Polysomnography Devices (PSG), Respiratory Polygraph, Sleep Apnea Screening Devices, Oximeter, Actigraphy Monitoring Device)], End Users (Sleep Laboratories & Hospitals & Home Care Setting/Individuals), Region (North America, Europe, Asia Pacific, Rest of the World), Company (Carefusion Corp, Somnomed, Resmed, Imthera Medical, Inc., Koninklijke Philips N.V.)' provides a detailed analysis of Worldwide Sleep Apnea Devices Industry.

Types - Sleep Apnea Devices Market breakup from 2 viewpoints:

1. Therapeutic Devices
2. Diagnostic Devices

Therapeutic Devices - Market have been further sub segmented from 4 viewpoints:

1. CPAP Sleep Apnea Therapeutic Devices
2. Auto CPAP Sleep Apnea Therapeutic Devices
3. BiPAP Sleep Apnea Therapeutic Devices
4. Others

Diagnostic Devices – Market have been further sub segmented from 5 viewpoints:

1. Polysomnography Devices (PSG)
2. Respiratory Polygraph
3. Sleep Apnea Screening Devices
4. Oximeter
5. Actigraphy Monitoring Device

End User - Sleep Apnea Devices Market breakup from 2 viewpoints:

1. Sleep Laboratories & Hospitals
2. Home Care Setting/Individuals

Region - Sleep Apnea Devices Market breakup from 4 Regions:

1. North America
2. Europe
3. Asia Pacific

4. Rest of the World

All key players have been covered from 4 viewpoints:

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Recent Developments

Financial Insight

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1. Carefusion Corp. (Part Of Becton, Dickinson And Company)
2. Somnomed
3. Resmed
4. Imthera Medical, Inc. (Part Of Livanova Plc)
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