Sleep Apnea Oral Appliances Market Forecasts to 2030 – Global Analysis By Product (Mandibular Advancement Devices, Tongue Stabilizing Devices and Rapid Maxillary Expansion), Type (Physician-Prescribed/Customized Oral Appliances and Online OTC Oral Appliances), Gender, Age Group, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Sleep Apnea Oral Appliances Market is accounted for $854.95 million in 2024 and is expected to reach $2343.41 million by 2030 growing at a CAGR of 18.3% during the forecast period. Sleep apnea oral appliances are custom-fitted dental devices designed to treat obstructive sleep apnea (OSA) by repositioning the lower jaw and tongue to keep the airway open during sleep. These devices, sometimes referred to as tongue-retaining devices (TRDs) or mandibular advancement devices (MADs), facilitate better breathing patterns overall, lessen snoring, and lessen airway collapse. Patients with mild to moderate OSA or those who have trouble adhering to CPAP therapy often choose them because they are a non-invasive substitute for CPAP therapy.

According to a study published in the Journal of Clinical Sleep Medicine, oral appliance therapy (OAT) significantly reduced the apnea-hypopnea index (AHI) by an average of 12 events per hour, improving sleep quality for patients with obstructive sleep apnea (OSA).

Market Dynamics:

Driver:

Increased sleep apnea prevalence

The market for sleep apnea oral appliances is driven in large part by the rising prevalence of sleep apnea, especially obstructive sleep apnea (OSA), which is caused by factors like rising obesity rates, sedentary lifestyles, smoking, alcohol consumption, and an aging population. Additionally, research shows that a significant number of sleep apnea cases go undiagnosed, which can result in serious health complications like diabetes, cardiovascular diseases, and cognitive impairment. As healthcare systems around the world emphasize early detection and treatment of sleep disorders, the demand for oral appliances are expected to increase as a practical and efficient way to manage mild to moderate OSA.

Restraint:

Limited effectiveness in cases of severe sleep apnea

Oral appliances limited ability to treat severe obstructive sleep apnea (OSA) is one of the main factors limiting the market for these devices. In mild to moderate cases, oral appliances are commonly advised; however, in severe cases, where continuous positive airway pressure (CPAP) therapy is still the gold standard, their effectiveness drastically decreases. Furthermore, oral appliances may not be sufficient to support severe OSA patients' airway pressure, which frequently calls for higher levels of support. In these situations, medical practitioners are more likely to suggest combination therapies, alternative treatments like CPAP, BiPAP, or even surgery, which limits the market expansion for standalone oral appliances.

Opportunity:

Growing number of sleep apnea cases without a diagnosis

The market for sleep apnea oral appliances has a great chance to grow due to the rising incidence of obstructive sleep apnea (OSA) worldwide. According to studies, millions of people go undiagnosed, and many people with sleep apnea are unaware that they have the condition. Growing awareness campaigns by governments, private healthcare facilities, and health organizations are progressively raising diagnosis rates, which raises the need for treatment. Moreover, because sleep apnea is frequently associated with diseases like obesity, diabetes, cardiovascular disorders, and hypertension, the growing prevalence of these comorbidities is anticipated to increase demand for oral

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appliances and other efficient OSA management solutions.

Threat:

Tough competition from surgical and CPAP interventions

Continuous Positive Airway Pressure (CPAP) devices, the gold standard for treating moderate to severe obstructive sleep apnea (OSA), are a fierce competitor in the sleep apnea oral appliances market. CPAP machines are frequently prescribed because of their demonstrated ability to keep the airway open, even in the face of patient noncompliance. Surgical procedures like maxillomandibular advancement (MMA), hypoglossal nerve stimulation, and uvulopalatopharyngoplasty (UPPP) are also becoming more and more common, especially among patients looking for a long-term cure for their ailment. Additionally, patients may choose these alternatives as technology advances increase CPAP comfort and surgical success rates, which would restrict the potential for oral appliance growth.

Covid-19 Impact:

The COVID-19 pandemic shaped the sleep apnea oral appliances market in a number of ways, including opportunities and challenges. The initial decline in new oral appliance fittings was caused by supply chain disruptions, manufacturing slowdowns, and fewer patients visiting dental clinics and sleep centers. Financial restraints, healthcare facility closures, and lockdowns caused many sleep apnea patients to put off their treatments, which hindered market expansion. But the pandemic also raised awareness of respiratory health and sleep issues, which resulted in more telemedicine consultations and home-based sleep tests. Furthermore, this gave some patients the idea to look into oral appliance therapy as a substitute for CPAP, particularly in light of worries that CPAP devices might aerosolize respiratory droplets.

The Mandibular Advancement Devices segment is expected to be the largest during the forecast period

The Mandibular Advancement Devices segment is expected to account for the largest market share during the forecast period because it is widely used, very effective, and preferred by patients over other dental appliances. Mild to moderate obstructive sleep apnea (OSA) can be effectively treated with MADs because they prevent airway collapse during sleep by moving the mandible, or lower jaw, slightly forward. Compared to alternatives such as Tongue Stabilizing Devices (TSDs), these devices are more comfortable and guaranteed to be used as prescribed by dentists or orthodontists. Moreover, they have established their dominance in the market owing to their non-invasiveness, simplicity of use, and increasing popularity as a substitute for CPAP therapy.

The Home Care Settings segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Home Care Settings segment is predicted to witness the highest growth rate because of the growing awareness of managing sleep apnea, the growing preference for at-home treatment options, and the advancements in telemedicine. In order to avoid frequent clinical visits, patients are increasingly looking for comfortable, affordable, and non-invasive solutions that they can use at home. The increasing use of home sleep testing (HST) has increased demand by facilitating speedier diagnosis and early oral appliance therapy initiation. Furthermore, to further boost this market, insurance companies are also increasing coverage for treatments for sleep apnea that can be done at home.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, fuelled by a strong healthcare system, a high level of awareness, and the rising incidence of sleep apnea. The market is dominated by the United States, where more cases are being diagnosed as a result of improved screening techniques, aging populations, and rising obesity rates. Adoption has been further accelerated by the availability of cutting-edge dental appliances, the robust presence of important market participants, and advantageous reimbursement policies. Moreover, oral appliance therapy is also actively promoted by the American Academy of Sleep Medicine (AASM) and other regulatory organizations as a viable substitute for CPAP, which increases patient and healthcare provider acceptance of the treatment.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by a growing prevalence of obesity-related sleep apnea, rising healthcare costs, and growing awareness of sleep disorders. Due to shifting lifestyles, urbanization, and increased stress levels, sleep apnea diagnoses are on the rise in nations like China, India, and Japan. This has increased demand for non-invasive and efficient treatment options. Additionally, the market is also growing faster due to the adoption of home sleep testing (HST), increased insurance coverage, and better healthcare infrastructure. International dental and sleep therapy brands are becoming more widely available in the area, and developments in 3D-printed and custom-fitted oral appliances are also helping to make treatment more affordable.

Key players in the market

Some of the key players in Sleep Apnea Oral Appliances market include Thermo Fisher Scientific Inc., Zephyr Sleep Technologies, Dentsply Sirona Inc, Fisher & Paykel Healthcare Limited, Airway Management, Inc., Koninklijke Philips N.V, BMC Medical Co., Ltd., DynaFlex Inc, ProSomnus, Inc., Straumann Group, SICAT GmbH and Co. KG, Myerson Solicitors LLP, Apnea Sciences Inc, SomnoMed Inc and ResMed Inc.

Key Developments:

In February 2025, Thermo Fisher Scientific Inc. announced that the company has entered into a definitive agreement with Solventum to acquire Solventum's Purification & Filtration business for approximately $4.1 billion in cash. Solventum's Purification & Filtration business is a leading provider of purification and filtration technologies used in the production of biologics as well as in medical technologies and industrial applications.

In July 2023, ResMed announced the acquisition of privately held Somnoware, a U.S. leader in sleep and respiratory care diagnostics software. Somnoware software streamlines the processes of physicians as well as sleep and pulmonary function testing labs for diagnosing and evaluating a patient's sleep and respiratory care test results, ordering PAP treatment equipment, setting up appointments, tracking PAP compliance, and electronically providing this information directly into a patient's electronic health record – all from within the Somnoware platform.

In July 2022, Straumann Group Acquires a Strategic Minority Stake and is Partnering with CareStack to Offer United States Dental Practices an Integrated, All-in-One Practice Management Solution. As a result of this partnership, CareStack will expand its service offering and presence in the United States market and beyond. Working closely with practitioners around the world, CareStack has developed a streamlined digital practice solution for the modern, growth-ready dental practice.

Products Covered:

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Mandibular Advancement Devices

Tongue Stabilizing Devices

Rapid Maxillary Expansion

Types Covered:

Physician-Prescribed/Customized Oral Appliances

Online OTC Oral Appliances

Genders Covered:

Male

Female

Age Groups Covered:

Less than 40

41 to 50

51 to 60

60 and Above

End Users Covered:

Hospital and Sleep Laboratories

Clinics and Office Facilities

Home Care Settings

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Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea

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Rest of Asia Pacific

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Argentina

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South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
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- Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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