

# **Airway Management Devices Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Supraglottic, Infraglottic, Resuscitators, Laryngoscopes, Others), By Application (Anesthesia, Emergency Medicine, Others), By End Use (Hospitals, Homecare, Others), By Region, By Competition**

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## **Abstracts**

The Global Airway Management Devices Market reached a valuation of USD 1.97 Billion in 2022, and it is poised for impressive growth throughout the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 6.12% up to 2028 and expected to reach USD 2.82 Billion in 2028. Airway management represents a critical component of medical care, ensuring the delivery of oxygen and ventilation to patients who are unable to autonomously maintain these vital functions.

In recent years, the global market for airway management devices has experienced substantial expansion, driven by several key factors. These include technological advancements, the increasing prevalence of respiratory diseases, and a growing emphasis on optimizing patient care. This market encompasses a wide array of equipment designed to aid healthcare professionals in maintaining clear airways and facilitating proper breathing in patients. These devices play indispensable roles across various medical scenarios, including surgical procedures, emergency care, intensive care units (ICUs), and pre-hospital settings.

The escalating prevalence of respiratory disorders, such as chronic obstructive pulmonary disease (COPD), asthma, and sleep apnea, has led to a heightened demand for airway management devices. These devices serve a pivotal role in managing and

preserving airway patency, guaranteeing that patients receive adequate oxygenation and ventilation. Continuous innovations in medical technology have led to the development of advanced airway management devices that are characterized by user-friendliness, precision, and enhanced efficiency. Prominent examples of these technologies include video laryngoscopes, supraglottic airway devices, and portable ventilators, all of which contribute to improved patient outcomes and ease of use for healthcare providers.

The global population is progressively aging, leading to a higher incidence of respiratory disorders and other health conditions necessitating airway management. This demographic shift has further fueled the demand for these devices, as older adults often require specialized care. Surgical procedures, both elective and emergency, frequently necessitate the use of airway management devices to maintain patients' respiration during anesthesia administration. The growing number of surgical interventions worldwide has significantly contributed to the expansion of this market.

Despite facing challenges related to cost considerations, training requirements, and regulatory compliance, the airway management devices market continues its growth trajectory. Key industry players persistently innovate and collaborate to develop solutions that enhance patient care and streamline healthcare providers' efficiency. As the industry progresses, the convergence of technology and medical expertise promises a brighter future for the airway management devices market, ultimately benefiting patients globally.

## Key Market Drivers

### 1. Rising Prevalence of Respiratory Diseases Drives the Global Airway Management Devices Market

In recent decades, the global healthcare landscape has experienced a notable surge in the prevalence of respiratory diseases. Factors such as urbanization, environmental pollution, lifestyle changes, and an aging population have collectively contributed to the growing burden of respiratory disorders. Consequently, there has been a substantial increase in the demand for advanced medical interventions and devices, with a particular focus on airway management devices.

Respiratory diseases encompass a broad spectrum of conditions that affect the lungs and airways, ranging from chronic obstructive pulmonary disease (COPD) and asthma to acute respiratory distress syndrome (ARDS) and lung infections. According to the

World Health Organization (WHO), more than 235 million people worldwide suffer from asthma, and over 3 million individuals succumb to chronic obstructive pulmonary disease annually.

Recent events, such as the COVID-19 pandemic, have underscored the critical importance of efficient airway management in the context of severe respiratory illnesses. Unhealthy lifestyles, including smoking, sedentary behavior, and poor dietary habits, have had direct adverse impacts on respiratory health, with smoking standing out as a leading cause of preventable respiratory diseases.

The global population is aging, resulting in a higher prevalence of age-related respiratory conditions. Elderly individuals tend to be more susceptible to respiratory infections and chronic diseases. Additionally, deteriorating air quality in various regions has led to an increase in respiratory ailments. Both outdoor air pollution and indoor air pollutants can adversely affect lung health. Rapid urbanization has exposed individuals to elevated levels of environmental pollutants such as particulate matter, allergens, and toxins, all of which contribute to the development and exacerbation of respiratory conditions.

As the prevalence of respiratory diseases continues to rise, the demand for effective medical interventions and advanced airway management devices has grown substantially. Airway management devices play a pivotal role in ensuring adequate oxygenation and ventilation for patients with compromised respiratory function. These devices find application in various healthcare settings, including hospitals, clinics, and emergency medical services.

## 2. Growing Surgical Procedures Driving the Global Airway Management Devices Market

The global increase in surgical procedures has emerged as a key driver behind the expansion of the airway management devices market. Surgical interventions span a wide spectrum of medical conditions, encompassing trauma cases, chronic diseases, cancer treatments, and cardiovascular procedures. Additionally, elective surgeries, such as those related to cosmetic enhancements and orthopedics, have experienced consistent growth due to shifting lifestyles and aging populations.

Precision airway management is a fundamental requirement for each surgical procedure to ensure the continuous oxygenation and ventilation of patients throughout the operation. This process entails maintaining an open and secure airway for patients during surgery, preventing any obstructions that could compromise breathing. Effective

airway management significantly mitigates the risk of complications, including hypoxia (insufficient oxygen supply) and hypercapnia (elevated carbon dioxide levels), which could lead to severe postoperative issues or even mortality.

Consequently, healthcare professionals prioritize the selection of appropriate airway management devices to enhance patient safety and optimize surgical outcomes. Patient safety stands as a paramount concern in the field of healthcare, and airway management devices make substantial contributions to this aspect by reducing the risk of complications stemming from inadequate oxygenation and ventilation. Proper airway management translates into shorter hospital stays, expedited recovery periods, and fewer postoperative complications. Consequently, healthcare facilities are willing to invest in high-quality airway management devices, given their potential to improve patient outcomes and overall satisfaction.

## Key Market Challenges

### 1. Technological Complexity and Integration

Modern airway management devices have grown increasingly sophisticated, characterized by the integration of advanced features such as video laryngoscopy, wireless connectivity, and real-time monitoring capabilities. While these technological advancements undoubtedly enhance patient care, they also introduce challenges related to device complexity, the necessity for adequate training, and seamless integration into existing healthcare systems. Healthcare professionals must receive comprehensive training to proficiently operate and troubleshoot these advanced devices. Furthermore, healthcare facilities need to allocate resources for infrastructure enhancements to support the seamless integration of these devices into their existing workflows.

### 2. Regulatory Compliance

Medical devices, including airway management devices, are subject to rigorous regulatory standards intended to safeguard patient safety and ensure device efficacy. Securing regulatory approvals and maintaining compliance with various international standards pose significant hurdles for device manufacturers. The complex landscape of regulations across different regions adds to the time and costs associated with bringing new airway management devices to market.

### 3. Economic Constraints

Global economic fluctuations, constraints on healthcare budgets, and reimbursement challenges can exert notable influences on the demand for airway management devices. Healthcare facilities, particularly those in resource-limited settings, may encounter difficulties when procuring and maintaining expensive advanced devices. These economic factors can hinder the adoption of the latest technologies, ultimately limiting patient access to state-of-the-art airway management solutions.

#### 4. Training and Education

Achieving proficient use of airway management devices necessitates that healthcare professionals possess a high level of expertise and training. It is imperative to establish comprehensive training programs to ensure that clinicians can adeptly employ these devices and respond effectively to emergency situations. However, organizing such programs and maintaining up-to-date knowledge can present logistical challenges for healthcare institutions, particularly in remote or underserved areas.

#### 5. Infection Control and Patient Safety

Airway management devices are frequently employed in critical care settings, where stringent infection control measures are of paramount importance. The proper cleaning, sterilization, and maintenance of these devices play critical roles in preventing healthcare-associated infections. Ensuring unwavering adherence to infection control protocols can be resource-intensive, requiring healthcare facilities to allocate sufficient resources and manpower.

### Key Market Trends

#### 1. Technological Advancements

Airway management encompasses a spectrum of techniques and devices used to establish and maintain a patient's airway, a fundamental necessity in various medical scenarios, including surgeries, anesthesia administration, intensive care, and emergency medicine. Traditional airway management devices, such as endotracheal tubes and laryngeal masks, have been foundational tools in healthcare for many years. However, the landscape of airway management is undergoing rapid evolution due to advancements in medical technology.

Conventional direct laryngoscopy is gradually giving way to video laryngoscopy, a

technique that employs a camera and display screen to visualize the airway. Video laryngoscopy offers enhanced visualization, particularly in challenging airway cases. Additionally, the integration of fiber optics into these devices equips clinicians with improved capabilities to navigate complex anatomical structures.

Supraglottic airway devices (SGAs) have been gaining popularity due to their user-friendliness and effectiveness. These devices, exemplified by the laryngeal mask airway (LMA) and the i-gel, are positioned above the vocal cords, offering a less invasive alternative to endotracheal intubation. Recent enhancements in SGA design have resulted in improved sealing capabilities, reducing the risk of aspiration.

The incorporation of sensors, connectivity features, and data analysis capabilities into airway management devices is reshaping patient care. Smart devices are capable of monitoring factors such as airway pressure and patient oxygen levels. Moreover, they can provide real-time feedback on device placement and effectiveness. This technological integration enhances patient safety and facilitates timely intervention in the event of complications.

Telemedicine has extended its reach into the realm of airway management. Clinicians can now access remote assistance from airway management experts during challenging intubation scenarios. This real-time collaboration ensures that patients receive optimal care, regardless of their geographical location.

## Segmental Insights

### 1. Product Insights

In 2022, the Supraglottic segment dominated the Airway Management Devices market and is anticipated to maintain its expansion in the years ahead. Supraglottic airway devices are medical instruments placed in the oropharynx to establish a secure airway during various medical procedures, including surgeries and emergency situations. Unlike endotracheal tubes, which traverse the vocal cords, supraglottic devices are positioned above the glottis, offering a less invasive approach and diminishing the risk of airway trauma. These devices exhibit versatility, accommodating a wide range of clinical scenarios, from routine surgical procedures to critical situations like cardiac arrests. Their adaptability renders them indispensable tools in various medical settings, including operating rooms, intensive care units, and pre-hospital care.

### 2. Application Insights



The Anesthesia segment dominated the Airway Management Devices market in 2022 and is anticipated to continue its growth trajectory in the coming years. Anesthesia plays a pivotal role in numerous surgical procedures, and as the global number of surgeries and medical interventions continues to rise, so does the demand for airway management devices employed during anesthesia administration. The field of anesthesia has witnessed significant technological advancements in airway management devices, rendering them more sophisticated, efficient, and safer over time. These advancements have contributed to the dominance of the Anesthesia segment in the market, as healthcare providers seek state-of-the-art equipment to ensure patient safety and optimize surgical outcomes.

### Regional Insights

North America boasts a well-established and well-funded healthcare infrastructure, characterized by a high demand for quality medical devices. Hospitals, clinics, and healthcare facilities in the region prioritize patient care and invest in the latest medical equipment, including airway management devices, to ensure optimal outcomes for patients. North America, particularly the United States, stands as a hub for technological innovations in the medical device industry. The region possesses a robust research and development infrastructure, facilitating the creation of innovative and advanced airway management devices. These technological strides position North American companies favorably in the global market, with the stringent regulatory standards imposed in the region by organizations like the U.S. Food and Drug Administration (FDA) instilling trust in the quality and reliability of approved devices. This trust in regulatory standards further propels the adoption of North American airway management devices on a global scale.

### Key Market Players

Medtronic

Teleflex

Ambu A/S

Smiths Medical

Medline Industries

Vbm Medizintechnik

VYAIRE MEDICAL, INC.

SunMed

Intersurgical Ltd

Flexicare (Group) Limited

### Report Scope:

In this report, the Global Airway Management Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Airway Management Devices Market, By Product:

Supraglottic

Infraglottic

Esuscitators

Laryngoscopes

Others

#### Airway Management Devices Market, By Application:

Anesthesia

Emergency Medicine

Others

#### Airway Management Devices Market, By End-Use:



Hospitals

Homecare

Others

Airway Management Devices Market, By Region:

North America

Asia-Pacific

Europe

Middle East & Africa

South America

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Airway Management Devices Market.

Available Customizations:

Global Airway Management Devices Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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