

Digital Dose Inhaler Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Product (Metered Dose Inhaler (MDI), Dry Powder Inhaler (DPI)), By Type (Branded Medication, Generic Medication), By Indication (Asthma, Chronic Obstructive Pulmonary Disease {COPD}, Others), By Region and Competition

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Abstracts

Global Digital Dose Inhaler Market was valued at USD 13.58 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 9.17% through 2029. The Digital Dose Inhaler market refers to the sector encompassing the development, manufacturing, and distribution of inhalers equipped with digital technology. These advanced devices not only deliver medication to patients with respiratory conditions such as asthma or COPD (Chronic Obstructive Pulmonary Disease) but also track usage data. This valuable information can be shared with healthcare providers to optimize treatment plans and improve patient outcomes.

Market Overview

Increase in Prevalence of Chronic Respiratory Diseases

Chronic respiratory diseases (CRDs) are complex multifactorial disorders encompassing the air passages and other pulmonary structures. Asthma, chronic obstructive pulmonary disorder (COPD), cystic fibrosis, lung cancer and sleep apnea are some of the leading chronic respiratory diseases which have emerged with a lucrative rate over recent years. In 2019, CRDs were the third leading cause accountable for 4.0 million deaths with a prevalence of 454.6 million instances across

the world. According to the reports published by Pan American Health Organization (PAHO), it has been observed that particularly in American region, CRDs were responsible for approximately 534,242 fatalities in 2019 encompassing 267,516 deaths among males and 266,725 deaths among females. Among various diseases, asthma has prevailed as the significant ailment which have increased the worldwide demand of digital dose inhalers. China, India, United States of America, Indonesia, Brazil, and Ethiopia are some of the major countries which have recorded highest number of asthma cases in their nation. As per the statistics published by Allergy and Asthma Networks, it has been observed that more than 26 million people are suffering from asthma in United States. Moreover, asthma affects around 8% of adults and 6.5% of children every year in the country. Over 20 clinical trials of digital inhalers in asthma or COPD collectively show enhancement in medication compliance, exacerbation susceptibility, and patient results with digital inhalers. The most common commercially available digital inhaler devices for monitoring inhaler use are Propeller Health, Teva Digihaler, Amiko Respiro, and Adherium Hailie. The digital dose inhaler is a device that delivers a precise quantity of medication to the respiratory system, in the form of a brief burst of atomized medicine that is self-administered by the patient through breathing in. The digital inhaler is equipped with integrated sensors that identify the usage of the inhaler and assess the rate of inhalation, according to the release and dosage control. Therefore, capability of digital dose inhalers to control the effects of chronic respiratory diseases is anticipated to register an impressive growth to Global Digital Dose Inhaler Market in the forecast period.

Introduction of New Products

Growth in launches of new products in the market associated with digital dose inhalers are further expected to propel the growth of market in upcoming years. In February 2022, Honeywell International Inc., an American global corporation, and AstraZeneca plc, a global pharmaceutical company, declared their collaboration to create inhalers for respiratory conditions by utilizing HFO-1234ze propellant. This propellant significantly reduces the Global Warming Potential (GWP) by 99.9% compared to the propellants currently employed in respiratory medications. Enerzair Breezhaler developed by Novartis AG, a Swiss pharmaceutical corporation, has been granted its authorization from the European Commission (EC), making it the first digital asthma treatment in the EU to be recommended coupled with a sensor and application. Moreover, in September 2022, Teva Pharmaceutical Industries Ltd. has introduced two digital inhalers in the United States namely ArmonAir Digihaler (fluticasone propionate) and AirDuo Digihaler (fluticasone propionate and salmeterol). To address the errors in device operations, a fully digital breath-activated inhaled (DBAI) delivery system has been created with

incorporated firmware and software. The DBAI is an innovative measured dosage inhaler created to surpass limitations of currently accessible pulmonary medication delivery apparatus. The main design elements of the Pneuma Inhaler comprise of a vibrating plate piezoelectric spray expeller, a contrasting pressure sensor, and a microprocessor that regulates dosage administration, user alerts, and dosage counting.

Surge in Technological Advancements

Increase in technological advancements related to digital dose inhalers is also one of the remarkable factors which is attributed to register a lucrative growth to Global Digital Dose Inhaler market in the forecast period. Aptar Pharma, a specialist in drug delivery, services, and innovative material science solutions has introduced HeroTracker Sense, a digital solution for monitoring respiratory health. This revolutionary technology transforms a regular metered dose inhaler (pMDI) into a smart connected healthcare device. HeroTracker Sense is specifically developed to enhance the well-being of individuals across the world who are affected with chronic respiratory ailments like asthma, COPD, Cystic Fibrosis, and other respiratory disorders caused by COVID-19. Its primary purpose is to monitor the usage of metered-dose inhalers (MDIs) and promote better compliance with prescribed treatment. The in-built sensors in the device allow for the generation and supply of data regarding the synchronization of inhalation with device activation, the speed of airflow, and the duration of each inhalation. Moreover, a recent global study conducted by RCSI University of Medicine and Health Sciences on 6th April 2023 has revealed substantial possibilities for digital technology to improve asthma management for patients. Developed in collaboration between RCSI and Trinity College Dublin, the INCA tool offers an evaluation of how patients utilize their inhalers, by measuring sound-wave signals emitted by the inhaler. The information is then transmitted to the patient's healthcare provider through a digital clinical decision platform that offers recommendations for the most effective treatment. Additionally, INCA devices can assist in distinguishing between individuals with severe asthma and those with difficult-to-manage asthma.

Growth in Geriatric Population

Rise in geriatric population and their increased vulnerability towards certain respiratory disorders are also supporting the market growth in the forecast period. According to the data released by Population Reference Bureau, it has been observed that China has the highest percentage of elderly people, with approximately 166.37 million individuals aged 65 and above out of the total population. India comes next with 84.9 million individuals, followed by the United States with 52.76 million individuals, Japan with

35.58 million individuals, and the Russian Federation with 21.42 million individuals aged 65 and above out of the entire population. Asthma is prevalent in individuals aged above 65 years and significantly reduces both mental and physical well-being. Use of hydrofluoroalkane (HFA) compressed metered dose inhaler (MDI) with a valved holding chamber, a breath-actuated dry powder inhaler, or a nebulizer can enhance the administration of medication in cases where the technique is suboptimal. Therefore, enhanced properties of digital dose inhalers to address such medical issues in elder population is expected to drive the market growth in the futuristic period.

Key Market Challenges

High Production Costs

High production costs pose a significant barrier to the widespread adoption of digital dose inhalers globally. The incorporation of sophisticated technologies such as sensors, connectivity features, and mobile applications into these devices results in substantial manufacturing expenses. These costs encompass not only the development and integration of the technology itself but also quality control measures to ensure reliability and accuracy. Additionally, the need for compliance with regulatory standards further adds to the production costs. As a consequence, digital dose inhalers are often priced at a premium compared to traditional inhalers, making them less accessible to patients and healthcare systems with limited financial resources. Furthermore, reimbursement challenges may deter healthcare providers from prescribing digital inhalers, particularly in regions where reimbursement rates do not adequately cover the higher cost of these devices. Consequently, despite the potential benefits offered by digital dose inhalers in improving medication adherence and patient outcomes, the high production costs associated with these devices serve as a deterrent to their widespread adoption globally.

Maintenance and Upkeep

Maintenance and upkeep requirements present a significant challenge to the widespread adoption of digital dose inhalers globally. While these advanced devices offer innovative features such as dose tracking and real-time data monitoring, they also require regular maintenance and updates to ensure optimal functionality. Patients using digital inhalers may encounter difficulties with software glitches, connectivity issues, or battery life, necessitating troubleshooting and technical support. Moreover, healthcare providers must invest time and resources in training patients on how to use and maintain these devices properly. The need for ongoing maintenance and support

increases the overall cost of ownership for digital dose inhalers, potentially deterring both patients and healthcare providers from embracing these technologies, particularly in resource-limited settings. Additionally, concerns about device reliability and the potential for disruptions in medication delivery may further dampen demand. Therefore, despite the promise of improved medication adherence and patient engagement, the maintenance and upkeep requirements associated with digital dose inhalers serve as barriers to their widespread adoption globally.

Key Market Trends

Innovation in Drug Delivery Systems

Innovation in drug delivery systems, particularly in the realm of digital dose inhalers, is driving a notable increase in demand globally. Digital dose inhalers represent a significant advancement in respiratory medication delivery, offering precise dosing, enhanced patient adherence, and real-time tracking of usage data. These inhalers integrate smart technology such as sensors, connectivity features, and mobile applications, enabling patients to monitor their medication intake and receive timely reminders for doses. Moreover, healthcare providers can remotely access and analyze inhaler usage data to tailor treatment plans and provide personalized care. The advent of digital dose inhalers is particularly beneficial for managing chronic respiratory conditions such as asthma and chronic obstructive pulmonary disease (COPD), where adherence to medication regimens is critical for disease management. Additionally, the convenience, accuracy, and improved patient engagement offered by digital dose inhalers are driving their adoption among healthcare professionals and patients alike, thereby fueling the global demand for these innovative drug delivery devices.

Investment in Health Tech Startups

Investment in health tech startups is significantly contributing to the growing demand for digital dose inhalers on a global scale. As venture capital continues to pour into the healthcare sector, there is a particular emphasis on supporting innovative solutions that improve patient outcomes and enhance healthcare delivery. Digital dose inhalers represent a prime example of such innovation, offering advanced features like dose tracking, medication reminders, and real-time data monitoring. With startups focusing on developing and refining these technologies, there's a surge in awareness and adoption of digital inhalers among healthcare providers and patients alike. Additionally, strategic partnerships between health tech startups, pharmaceutical companies, and healthcare providers are driving the integration of digital inhalers into clinical practice. These

collaborations facilitate the development of tailored solutions and expand market access for digital dose inhalers globally. As investment in health tech startups continues to grow, fueled by the promise of transformative healthcare solutions, the demand for digital dose inhalers is poised to rise, revolutionizing respiratory care on a global scale.

Segmental Insights

Product Insights

Based on the product, the Global Digital Dose Inhaler Market has witnessed a significant rise in the popularity of the Metered Dose Inhaler (MDI) segment. MDIs have become widely favored among patients due to their exceptional convenience, portability, and ease of use. These attributes have made MDIs the dominant choice for individuals requiring regular medication doses to manage conditions such as asthma and COPD (Chronic Obstructive Pulmonary Disease).

Furthermore, the market has seen remarkable advancements in digital integration, which have further solidified the position of MDIs. The incorporation of features like dose counters and connectivity with health tracking apps has enhanced the overall effectiveness and user experience of MDIs. These digital enhancements provide patients with greater control and awareness of their medication usage, enabling them to better manage their respiratory conditions. As a result, the MDI segment has experienced continuous growth and shows immense potential for the future. With ongoing advancements in technology and increasing demand for improved respiratory care, the Global Digital Dose Inhaler Market is poised to witness further expansion and innovation in the coming years.

Type Insights

Based on the Type segment, within the Global Digital Dose Inhaler Market, generic medications are gaining a significant foothold due to their cost-effectiveness and the growing support from regulations favouring generic drug prescription. These medications, which are typically more affordable than their branded counterparts, offer a viable option for patients and healthcare systems seeking to manage costs without compromising on quality. While branded medications continue to dominate in terms of initial market entry and innovation, the price sensitivity of healthcare systems and patients alike is shifting the balance toward generics.

Furthermore, the recent patent expirations of leading branded inhalers have paved the

way for generic alternatives to capture an increasing market share. This presents an opportunity for generic manufacturers to enter the market with their own innovative solutions, providing patients with a wider range of choices. As the demand for affordable yet effective inhaler options continue to rise, the market landscape is expected to evolve further, with generic medications playing a critical role in meeting the needs of patients and healthcare systems worldwide.

Regional Insights

The North American region, particularly the United States, is currently dominating the Global Digital Dose Inhaler Market. This dominance can be attributed to several factors that contribute to the region's success. There is a high level of health awareness among the population, which drives the demand for advanced healthcare solutions. Secondly, the region boasts a well-developed healthcare infrastructure that supports the widespread adoption of digital health technologies, including digital inhaler devices. Furthermore, the pharmaceutical and biotechnology sectors in North America have made significant investments in research and development, resulting in the continuous innovation of digital inhaler technologies. This investment not only fuels the growth of the market but also ensures that patients have access to cutting-edge devices that improve their quality of life.

Moreover, the presence of key market players in the region plays a crucial role in supporting rapid innovation and accessibility to digital inhaler devices. These industry leaders collaborate with healthcare providers, researchers, and patients to develop and distribute innovative solutions that address the specific needs of the market. The North American region, particularly the United States, is at the forefront of the Global Digital Dose Inhaler Market due to high health awareness, advanced healthcare infrastructure, widespread adoption of digital health technologies, significant investment in research and development, and the presence of key market players.

Key Market Players

3M Company

AstraZeneca Plc.

Glenmark Pharmaceuticals Ltd.

Novartis AG

Propeller Health Inc.

Opko Health, Inc.

Teva Pharmaceuticals Industries Ltd.

Beximco Pharmaceuticals Limited

GlaxoSmithKline Plc.

Mundipharma Deutschland GmbH & Co. KG

Report Scope:

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

Digital Dose Inhaler Market, By Product:

Metered Dose Inhaler (MDI)

Dry Powder Inhaler (DPI)

Digital Dose Inhaler Market, By Type:

Branded Medication

Generic Medication

Digital Dose Inhaler Market, By Indication:

Asthma

Chronic Obstructive Pulmonary Disease (COPD)

Others

Digital Dose Inhaler Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Digital Dose Inhaler Market.

Available Customizations:

Global Digital Dose Inhaler 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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