

# **India Respiratory Care Devices Market Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Product Type (Therapeutic Devices, Monitoring Devices, Diagnostic Devices, Consumables & Accessories), By Indication (Chronic Obstructive Pulmonary Disease, Infectious Diseases, Asthma, Sleep Apnea, Others), By End User (Hospitals & Clinics, Ambulatory Care Centers, Others), by region, and Competition**

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## **Abstracts**

India Respiratory Care Devices Market has valued at USD 1489.04 million in 2023 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 7.07% through 2029. Respiratory care devices are a category of medical equipment designed to assist individuals with respiratory conditions in breathing more effectively, improve their lung function, and manage various respiratory disorders. These devices are used in healthcare facilities, home healthcare settings, and sometimes by individuals themselves. They serve a range of diagnostic, therapeutic, and supportive functions to address respiratory issues. Ventilators, also known as mechanical ventilators or respirators, are devices that assist patients in breathing when they are unable to do so adequately on their own. They deliver controlled amounts of air or oxygen into the lungs, supporting patients with respiratory failure or severe breathing difficulties. Nebulizers convert liquid medication into a fine mist that can be inhaled by the patient. They are commonly used to deliver medications for respiratory conditions such as asthma, chronic obstructive pulmonary disease (COPD), and cystic fibrosis. Pulse oximeters are non-invasive devices that measure the oxygen saturation level in the blood, as well as the patient's pulse rate. They are commonly used to monitor

oxygen levels and heart rate, especially in patients with respiratory conditions.

India faces severe air pollution in many urban areas, leading to a higher incidence of respiratory illnesses. This makes respiratory care devices essential for managing and treating these conditions. Ongoing advancements in respiratory care device technology, such as more efficient ventilators, oxygen concentrators, and portable devices, drive market growth as healthcare providers seek the latest and most effective equipment. Growing awareness about respiratory health and the importance of early diagnosis and treatment has led to an increased demand for diagnostic and monitoring devices. Concerns about the impact of environmental factors, such as pollution and allergens, on respiratory health have driven demand for devices that assess and address these concerns.

## Key Market Drivers

### Technological Advancements

Technological advancements in respiratory care devices have led to significant improvements in the diagnosis, treatment, and management of respiratory conditions. These advancements aim to enhance patient comfort, provide more accurate data, and improve overall healthcare outcomes. Modern ventilators offer a wide range of ventilation modes, including pressure control, volume control, and adaptive support. These modes provide more personalized and efficient respiratory support. Compact and lightweight ventilators allow for greater mobility, enabling patients to receive ventilation support outside of traditional clinical settings. Oxygen concentrators have become more energy-efficient and portable. Some models are battery-operated, making them suitable for home use and travel. Liquid Oxygen Systems store oxygen in liquid form, providing a continuous supply of oxygen and eliminating the need for frequent cylinder replacement.

These inhalers are equipped with sensors and connectivity to monitor usage and provide feedback to patients and healthcare providers. They help ensure proper inhaler technique and adherence to treatment plans. Digital spirometers offer real-time feedback on lung function, helping individuals with asthma track their respiratory health. Continuous Positive Airway Pressure (CPAP) Devices have become more compact and quieter. Integrated humidification systems improve patients' comfort. Patients can use remote monitoring devices to track their vital signs and respiratory function. Data is transmitted to healthcare providers, enabling timely adjustments to treatment plans.

These devices incorporate advanced filtration technologies to remove allergens,

pollutants, and pathogens from indoor air, benefiting individuals with respiratory conditions. Researchers are developing sensors capable of analyzing exhaled breath to detect biomarkers associated with respiratory conditions and infections. AI algorithms can analyze large datasets of patient information to identify trends, predict exacerbations, and provide personalized treatment recommendations for respiratory conditions. Nanotechnology is being used to create more efficient drug delivery systems for respiratory conditions. It allows for targeted delivery of medications to affected areas of the lungs, reducing side effects. 3D printing technology is being used to create custom-designed respiratory devices, including prosthetic airway splints for pediatric patients with tracheobronchomalacia. This factor will help in the development of the India Respiratory Care Devices Market.

### Increasing Aging Population

As individuals age, they are more susceptible to respiratory conditions such as chronic obstructive pulmonary disease (COPD), asthma, and sleep apnea. The natural aging process can lead to changes in lung function, making older individuals more prone to these conditions. This increased prevalence of respiratory diseases drives the demand for respiratory care devices. Older adults are at a higher risk of developing chronic health conditions, including respiratory diseases. Conditions like hypertension and heart disease can exacerbate respiratory issues, making respiratory care devices essential for managing these comorbidities. Aging often leads to a gradual decline in lung function, reduced lung capacity, and decreased respiratory muscle strength. Respiratory care devices can help older adults maintain adequate oxygen levels and alleviate symptoms related to reduced lung function.

Older adults are more susceptible to respiratory infections, including pneumonia and influenza. Respiratory care devices such as oxygen therapy equipment and nebulizers are essential for managing respiratory distress caused by infections. Sleep apnea and other sleep-related breathing disorders are more common in older individuals. Continuous Positive Airway Pressure (CPAP) devices, often used to treat sleep apnea, are in high demand among the elderly. Older adults may require respiratory care devices following surgery or hospitalization, especially if they experience complications or undergo respiratory therapy. These devices aid in recovery and rehabilitation. Many older adults reside in long-term care facilities, where the demand for respiratory care devices is consistently high. These facilities require a range of devices to meet the needs of their residents.

With a growing number of older adults choosing to age in place, there is an increased

demand for home healthcare services. This includes the use of respiratory care devices at home to manage chronic conditions and reduce hospital readmissions. Advances in respiratory care device technology have made devices more user-friendly and convenient for older adults. For example, lightweight and portable oxygen concentrators are easier to carry and use. Many older adults have the financial means to invest in their healthcare. This demographic often has access to insurance coverage and financial resources to purchase and maintain respiratory care devices. This factor will pace up the demand of the India Respiratory Care Devices Market.

### Rising Environmental Factors

High levels of air pollution, often associated with urban areas and industrial regions, can have a detrimental impact on respiratory health. Pollutants like particulate matter, ozone, and nitrogen dioxide can lead to respiratory conditions and exacerbate existing ones, such as asthma and chronic obstructive pulmonary disease (COPD). The need for respiratory care devices increases in areas with poor air quality. Environmental allergens, including pollen, mold, pet dander, and dust mites, can trigger allergic respiratory conditions like allergic rhinitis and asthma. Respiratory care devices such as nebulizers and inhalers are used to manage symptoms when allergens are prevalent. Changing weather patterns and climate-related events, such as wildfires and extreme heat, can worsen air quality and lead to respiratory distress. Respiratory care devices are crucial in managing exacerbations caused by these environmental changes. Individuals working in certain industries may be exposed to occupational hazards like dust, fumes, and chemicals. This exposure can result in occupational lung diseases. Respiratory care devices are necessary for managing and mitigating the effects of such exposures.

Poor indoor air quality, often found in homes and workplaces, can lead to respiratory problems. Inadequate ventilation and the presence of pollutants like tobacco smoke can be harmful to respiratory health. Air purifiers and home-based respiratory care devices are used to improve indoor air quality. Certain geographic regions are more prone to environmental factors that affect respiratory health. For example, coastal areas may have higher humidity and mold growth, while arid regions can experience dust storms. Respiratory care devices are needed to manage region-specific issues. Seasonal changes can bring about specific allergens like pollen during spring or fall. These seasonal allergies can lead to respiratory symptoms, requiring the use of respiratory care devices during times of the year.

Natural disasters, such as hurricanes, floods, and wildfires, can lead to environmental

disturbances, including poor air quality and increased particulate matter in the air. In the aftermath of these events, respiratory care devices are essential for treating individuals affected by respiratory distress. The increasing awareness of the impact of environmental factors on respiratory health has prompted individuals to take preventive measures. This includes using masks and personal respiratory protection devices in areas with air pollution or during specific activities. Research on the connection between environmental factors and respiratory health has led to a better understanding of the need for respiratory care devices in specific contexts. Data on air quality and health outcomes have also contributed to the demand for these devices. This factor will accelerate the demand of the India Respiratory Care Devices Market.

### Key Market Challenges

#### Supply Chain Issues

Many respiratory care devices are manufactured using components and materials sourced from various parts of the world. Global disruptions, such as trade disputes, transportation bottlenecks, or the COVID-19 pandemic, can lead to delays in the procurement of these components, affecting the production of devices. Within India, supply chain challenges may include issues related to logistics, distribution, and warehousing. Efficient transportation and warehousing of devices are critical to ensuring that they reach healthcare facilities in a timely manner.

Ensuring the quality and regulatory compliance of respiratory care devices throughout the supply chain can be challenging. It often involves coordination between manufacturers, distributors, and regulatory bodies to meet safety and quality standards. Maintaining an optimal inventory of respiratory care devices can be complex. Overstocking may lead to financial strain, while understocking can result in device shortages when demand is high. An efficient and reliable distribution network is essential for delivering devices to hospitals, clinics, and other healthcare facilities. Delays or inefficiencies in this network can disrupt the availability of devices where they are needed. Supply chain disruptions can impact the cost of manufacturing and transportation. This, in turn, may affect the pricing of respiratory care devices and their affordability for healthcare providers and patients.

#### Insurance and Reimbursement

In India, many individuals, particularly in lower-income segments, do not have adequate health insurance coverage. This limits their ability to afford respiratory care devices,

which can be expensive. As a result, some patients may not have access to necessary devices. Even when individuals have health insurance, the coverage for respiratory care devices may be incomplete or have restrictions. Insurance plans may not fully cover the cost of devices, leaving patients with out-of-pocket expenses. Different insurance providers may have varying policies on the coverage of respiratory care devices. This can lead to confusion and inconsistencies in reimbursement, making it challenging for patients to understand what is covered. Some insurance plans may require pre-authorization or extensive documentation before approving reimbursement for respiratory care devices. This can be time-consuming and burdensome for patients and healthcare providers. Many patients and healthcare providers may not be fully aware of the extent of insurance coverage available for respiratory care devices. This lack of awareness can result in missed opportunities for reimbursement. Accurate and detailed documentation is often required to secure reimbursement. Incomplete or incorrect documentation can result in claim denials and delayed reimbursement.

## Key Market Trends

### Home Healthcare

Home healthcare provides patients with the convenience of receiving respiratory care in the comfort of their homes. Patients no longer need to travel to healthcare facilities for routine check-ups, device monitoring, or treatment. Home healthcare can be a cost-effective alternative to hospital or clinic-based care. It eliminates the need for extended hospital stays and reduces healthcare expenditures for patients and insurers. India has a growing elderly population, and many older adults prefer to age in place. Home healthcare allows elderly individuals with respiratory conditions to receive care while maintaining their independence. Many respiratory conditions, such as COPD and sleep apnea, require ongoing management and monitoring. Home healthcare offers a seamless way to address the long-term needs of patients. Advances in telemedicine and remote monitoring technology enable healthcare providers to monitor patients' respiratory health in real-time. This technology is increasingly integrated into respiratory care devices, allowing for remote data transmission. Home-based ventilators and related respiratory care devices make it possible for ventilator-dependent patients to receive care at home. This can improve their quality of life and reduce the burden on healthcare facilities. Home healthcare providers can tailor care plans to the specific needs of patients, providing personalized care and education about respiratory conditions and device use.

## Segmental Insights



## Product Type Insights

In 2023, the India Respiratory Care Devices Market largest share was held by Diagnostic Devices segment and is predicted to continue expanding over the coming years. Diagnostic devices play a crucial role in the early diagnosis and continuous monitoring of respiratory conditions. Timely identification of respiratory issues is essential for effective treatment. As a result, the demand for diagnostic devices in the Indian healthcare system has been steadily increasing. Respiratory diseases such as asthma, chronic obstructive pulmonary disease (COPD), and sleep apnea have a significant prevalence in India. To manage these conditions, healthcare providers rely on diagnostic devices such as spirometers, peak flow meters, and pulse oximeters to assess lung function and oxygen saturation levels. There has been a growing awareness among the general population and healthcare professionals about the importance of early diagnosis and regular monitoring of respiratory conditions. This awareness has increased the adoption of diagnostic devices. Various government healthcare initiatives and programs have emphasized the importance of diagnosing respiratory conditions at an early stage. These programs have often included the procurement and distribution of diagnostic devices to healthcare facilities. The presence of specialized clinics and pulmonologists who focus on respiratory health and diseases has driven the demand for diagnostic devices. These healthcare providers rely on accurate diagnostic tools to assess and manage patients with respiratory conditions.

## Indication Insights

In 2023, the India Respiratory Care Devices Market largest share was held by Asthma segment and is predicted to continue expanding over the coming years. Asthma is a common chronic respiratory condition in India. The country has a significant number of people suffering from asthma due to various factors, including pollution, allergens, and genetic predisposition. The high prevalence of asthma naturally drives the demand for respiratory care devices designed for asthma management. Many urban areas in India experience high levels of air pollution, which can exacerbate respiratory conditions like asthma. This is particularly prominent in regions with increased industrialization and vehicular emissions. People living in these areas often require respiratory care devices to manage their asthma symptoms. There has been a growing awareness about respiratory conditions and the importance of early diagnosis and management. As a result, more individuals with asthma are seeking medical attention and utilizing respiratory care devices as part of their treatment regimen. Inhalers and nebulizers, which are commonly used to manage asthma, are considered respiratory care devices.

These devices are widely available and prescribed by healthcare professionals to asthmatic patients. The ease of use and effectiveness of these devices contribute to their prevalence in the market. The Indian government and various healthcare organizations have launched initiatives to raise awareness about asthma and other respiratory conditions. These initiatives often stress the importance of timely diagnosis and treatment, which can include the use of respiratory care devices.

### End-User Insights

In 2023, the India Respiratory Care Devices Market largest share was held by Hospitals & Clinics segment in the forecast period and is predicted to continue expanding over the coming years. Hospitals and clinics in India are equipped with advanced medical infrastructure and facilities. They often have specialized respiratory care units, intensive care units (ICUs), and pulmonary departments. These facilities require a wide range of respiratory care devices to treat patients with various respiratory conditions. Hospitals and clinics serve as central locations for diagnosing and treating patients with respiratory issues. They are equipped to provide comprehensive care, which includes the use of various respiratory care devices such as ventilators, oxygen concentrators, and nebulizers. Respiratory care devices are essential for patients in critical condition. Hospitals and clinics often treat individuals with severe respiratory diseases, such as acute respiratory distress syndrome (ARDS) or patients in need of surgery. These conditions require the use of ventilators and other advanced respiratory devices. Hospitals and clinics have a team of healthcare professionals, including pulmonologists, respiratory therapists, and critical care nurses, who are trained to operate and manage respiratory care devices. This expertise ensures proper usage and patient care. Hospitals and clinics require a broad range of respiratory care devices to meet the diverse needs of patients. This includes devices for asthma management, sleep apnea treatment, oxygen therapy, and mechanical ventilation, among others.

### Regional Insights

The North India region dominates the India Respiratory Care Devices Market in 2023. North India is one of the most densely populated regions in the country. Higher population density can lead to a higher prevalence of respiratory diseases due to factors like air pollution, dust, and crowded living conditions. This increased disease burden drives the demand for respiratory care devices. North India, particularly in cities like Delhi, has a relatively better-developed healthcare infrastructure compared to some other regions. Well-established hospitals, clinics, and healthcare facilities are more likely to have advanced respiratory care equipment, leading to higher usage and market



presence. The region is home to some of India's top government and private hospitals and medical institutions. These institutions often have access to greater resources and investments in medical equipment, including respiratory care devices. North India is home to several medical colleges and research institutions. This concentration of healthcare education and research can lead to greater awareness and utilization of advanced medical technologies, including respiratory care devices.

### Key Market Players

India Medtronic Private Limited

ResMed India Pvt. Ltd.

Philips Healthcare India

Masimo Medical Technologies India Private Limited

Getinge India Pvt Ltd

Draeger India Private Limited

Hamilton Medical India Private Limited

Fisher & Paykel Healthcare India Pvt Ltd

Wipro GE Healthcare Pvt Ltd

Hill-Rom India Private, Ltd.

Becton, Dickinson, and Company (CareFusion Corp.)

Opto Circuits India Ltd.

Omron Healthcare India Pvt. Ltd.

Nihon Kohden India Pvt. Ltd

Report Scope:

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

Respiratory Care Devices Market, By Product Type:

Therapeutic Devices

Monitoring Devices

Diagnostic Devices

Consumables & Accessories

Respiratory Care Devices Market, By Indication:

Chronic Obstructive Pulmonary Disease

Infectious Diseases

Asthma

Sleep Apnea

Others

Respiratory Care Devices Market, By End-User:

Hospitals & Clinics

Ambulatory Care Centers

Others

Respiratory Care Devices Market, By region:

North India

South India

East India

West India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Respiratory Care Devices Market.

Available Customizations:

India Respiratory Care 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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