

Manual Resuscitators Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Self-inflating Resuscitator, Flow-inflating Resuscitator, T-piece), By Modality (Disposable, Reusable), By Material (Silicon, PVC, Rubber), By Technology (Pop-off Valve, PEEP Valve, Others), By Patient Type (Adult, Pediatric, Others), By Application (Chronic obstructive pulmonary disease, Cardiopulmonary arrest, Others), By End Use (Hospital, Out-of-hospital, ASC, Military, Others), By Region, and By Competition, 2019-2029F

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Abstracts

Global Manual Resuscitators Market was valued at USD 500.25 million in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.36% through 2029. The global rise in respiratory illnesses and the escalating need for emergency medical equipment are fueling the expansion of the market for manual resuscitators. A manual resuscitator, which is also referred to as a Bag Valve Mask (BVM) or self-inflating bag, is a device frequently used to provide positive ventilation for patients who are unable to breathe. Key areas where manual resuscitators find application encompass ambulances, emergency departments, and other critical healthcare scenarios.

Key Market Drivers

Increasing Prevalence of Respiratory Diseases

The Global Manual Resuscitators Market is witnessing significant growth, primarily driven by the rising prevalence of respiratory diseases. Conditions like chronic obstructive pulmonary disease (COPD), asthma, pneumonia, and others are becoming increasingly common worldwide. Factors such as air pollution, smoking, and lifestyle changes contribute to this trend. Respiratory diseases rank among the leading causes of death globally, according to the World Health Organization (WHO), underscoring the urgent need for effective respiratory support.

During acute exacerbations of respiratory diseases, patients often experience severe breathing difficulties, necessitating immediate intervention to save lives. Manual resuscitators, also known as Bag Valve Masks (BVMs) or self-inflating bags, play a crucial role in providing positive pressure ventilation to patients unable to breathe effectively. As the prevalence of respiratory diseases continues to rise, the demand for these life-saving devices escalates, especially in emergency situations. Hospitals and emergency rooms are at the forefront of managing respiratory distress cases. With the increasing incidence of respiratory diseases, healthcare facilities must be adequately equipped to handle a higher patient volume. Manual resuscitators are indispensable tools in such scenarios, making them essential components of medical equipment inventories for hospitals and emergency rooms.

The growing prevalence of respiratory diseases has raised expectations regarding the quality of care delivered in healthcare settings. Patients and their families now demand reliable, efficient, and user-friendly medical equipment. This drives healthcare institutions to invest in cutting-edge technology, thereby fueling the market for manual resuscitators. Training in basic life support and advanced cardiac life support is becoming more widespread among healthcare professionals, first responders, and even laypersons. Manual resuscitators form a fundamental part of this training, ensuring individuals are prepared to provide respiratory support when necessary. The increased focus on training and readiness contributes to the rising demand for manual resuscitators.

Emergency Response and Ambulance Services

The global manual resuscitators market is witnessing remarkable growth, driven significantly by the essential role played by emergency response and ambulance services. These critical components of healthcare, often the initial responders to medical emergencies, heavily rely on manual resuscitators, also known as Bag Valve Masks (BVMs) or self-inflating bags. In critical medical situations where every second is

crucial, prompt and effective intervention is imperative. Ambulance services, typically the first point of contact for individuals facing emergencies, depend heavily on manual resuscitators to provide life-saving respiratory support. As the demand for swift response increases, so does the need for manual resuscitators.

Modern ambulances are equipped with advanced medical gear, effectively functioning as mobile clinics. Manual resuscitators are integral to this equipment, enabling paramedics and emergency medical technicians to deliver essential respiratory care during transportation. The growing focus on enhancing ambulance services has led to a surge in demand for high-quality manual resuscitators. With urbanization and traffic congestion on the rise globally, the likelihood of accidents and medical emergencies occurring on roads has increased. Urban ambulance services must be well-prepared for such incidents, including those necessitating respiratory support. Manual resuscitators are indispensable in their readiness efforts, thereby contributing to the expansion of the global market.

The global population is experiencing growth, accompanied by an increase in the elderly demographic, who are more prone to respiratory and cardiac issues. Given the heightened susceptibility of aging demographics to such health challenges, respiratory support becomes even more critical. As ambulance services cater to a larger and more diverse population, the demand for manual resuscitators continues to grow. Emergency response personnel undergo extensive training, including cardiopulmonary resuscitation (CPR) and advanced cardiac life support (ACLS) courses. Manual resuscitators are pivotal in this training regimen, as they play a central role in life-saving procedures. With the growing emphasis on training and certification, the demand for manual resuscitators has naturally increased.

Hospital and Emergency Room Usage

The global manual resuscitators market is witnessing significant growth, largely driven by the indispensable role played by hospitals and emergency rooms. These healthcare facilities heavily rely on manual resuscitators, also known as Bag Valve Masks (BVMs) or self-inflating bags, to provide life-saving respiratory support to patients in critical conditions. Hospitals and emergency rooms serve as the frontline of healthcare, often receiving patients facing life-threatening situations. Manual resuscitators are crucial devices that deliver positive pressure ventilation to individuals experiencing respiratory distress. In emergency scenarios, the timely and effective use of these devices can be decisive, highlighting their essentiality in hospital and emergency room environments.

With the global population steadily increasing, healthcare facilities face a growing influx of patients. As hospital admissions rise, so does the demand for vital medical equipment, including manual resuscitators. These devices play a pivotal role in managing patients with respiratory complications, aligning with the imperative of providing high-quality patient care. Hospital and emergency room settings encounter diverse medical emergencies, many necessitating immediate respiratory support. Manual resuscitators exhibit versatility, catering to various clinical scenarios and thus becoming integral components of the medical equipment inventory. Their adaptability to different situations further propels their demand within hospital environments.

The evolving healthcare landscape has heightened patient expectations regarding the quality of care they receive. Patients and their families anticipate readily available, reliable, and efficient medical equipment during treatment. Manual resuscitators must meet these expectations, prompting healthcare institutions to invest in state-of-the-art technology and superior equipment, driving market growth further. Innovations in manual resuscitator technology have rendered these devices more user-friendly, efficient, and safer. Hospitals and emergency rooms are keen to embrace these advanced devices to ensure optimal patient care. The continuous advancement of manual resuscitator technology serves as a significant catalyst in their increasing utilization within medical settings.

Pandemic Preparedness

The global manual resuscitators market is witnessing significant growth, largely attributed to the heightened focus on pandemic preparedness. In the aftermath of the COVID-19 pandemic, healthcare systems worldwide are prioritizing the reinforcement of their capabilities to manage respiratory emergencies effectively. Manual resuscitators, also referred to as Bag Valve Masks (BVMs) or self-inflating bags, have emerged as indispensable assets for providing crucial respiratory support to critically ill patients during health crises. The COVID-19 pandemic served as a stark reminder of the criticality of respiratory support in combating highly contagious and life-threatening diseases. Manual resuscitators played a pivotal role in delivering life-saving care, particularly in regions overwhelmed by the pandemic's impact. This experience underscored the essential role of manual resuscitators in pandemic response efforts.

In light of the lessons learned from the COVID-19 pandemic, governments and healthcare organizations worldwide have recognized the necessity of stockpiling essential medical equipment, including manual resuscitators, to enhance preparedness for future health emergencies. Consequently, there has been a notable surge in

demand for these devices, significantly driving market growth. With the acknowledgment that novel infectious diseases can arise unexpectedly, preparedness for future pandemics entails ensuring adequate access to critical equipment for managing respiratory distress. Manual resuscitators are integral components of these preparedness strategies, prompting increased investments in these devices across healthcare facilities.

The aftermath of the COVID-19 pandemic has emphasized the importance of healthcare professionals being well-trained and equipped to address respiratory crises effectively. Training programs now place a heightened emphasis on the utilization of manual resuscitators, integrating them into essential components of pandemic readiness initiatives. Consequently, healthcare institutions have ramped up their procurement of these devices to bolster their response capabilities. Given the global nature of pandemics, international cooperation and assistance often play crucial roles in relief efforts. In such scenarios, manual resuscitators emerge as indispensable medical equipment for providing immediate respiratory support. The collaborative efforts in coordinating supplies and aid across borders have spurred greater demand for these devices on a global scale.

Key Market Challenges

Supply Chain Disruptions

The COVID-19 pandemic exposed the vulnerabilities in global supply chains. Manufacturers of manual resuscitators faced disruptions in the production and distribution of these life-saving devices due to lockdowns, transportation restrictions, and shortages of raw materials. Ensuring a stable supply chain is crucial to meeting the increasing demand for manual resuscitators.

Quality and Safety Standards

The manual resuscitators market must adhere to stringent quality and safety standards to ensure patient safety. Meeting these standards often requires substantial investment in research, development, and testing. Manufacturers must consistently produce devices that comply with international regulations, which can be challenging for smaller producers.

Rising Competition

The increasing prevalence of respiratory diseases and the recognition of manual resuscitators' importance have attracted new entrants to the market. This heightened competition can lead to price wars, making it difficult for established manufacturers to maintain their market share and profitability.

Key Market Trends

Increased Portability and Compact Design

Compact, portable manual resuscitators are gaining prominence. These devices are ideal for emergency services in confined spaces or during patient transport. The demand for lightweight and easily maneuverable manual resuscitators is expected to rise significantly.

Eco-Friendly Solutions

A growing emphasis on sustainability and eco-friendliness is influencing the market. Manufacturers are developing manual resuscitators with recyclable and environmentally friendly materials. These eco-conscious choices are not only good for the planet but also enhance the reputation of healthcare facilities.

Global Distribution and Accessibility

The distribution of manual resuscitators is becoming more equitable. Efforts are underway to ensure that underserved and vulnerable populations have access to these life-saving devices. Global organizations and governments are working towards bridging the healthcare gap, making manual resuscitators more accessible worldwide.

Segmental Insights

Modality Insights

Based on the category of Modality, the disposable category dominated the market share in 2023 and is projected to experience significant growth in the coming forecast period. This is primarily attributed to the increasing preference for single-use resuscitators among both patients and healthcare professionals due to their lower risk of infection. Additionally, the rising incidence of cardiopulmonary disorders is contributing to the growth of this segment.

The market is categorized into two modalities: reusable and disposable. Typically, single-use resuscitation bags are constructed from PVC material, while their reusable counterparts are manufactured using silicone. Reusable resuscitation bags can be cleaned, sterilized, and reassembled, albeit at a higher initial cost compared to disposable ones. However, they prove to be more cost-effective in the long run. Silicone resuscitation bags that are reusable are not only environmentally friendly but also free from latex and odor. Moreover, they offer a softer touch, which is expected to be a driving factor in the growth of the reusable segment.

Material Insights

Based on Material, the silicone sector captured the largest market share in 2023 primarily because of its widespread utilization in hospitals and outpatient facilities for the treatment of pediatric and adult patients suffering from cardiac and respiratory ailments. Prominent manufacturers have been heavily employing silicone-based manual resuscitators, with most innovations centered around this material. For instance, in September 2020, Aequs introduced AQovent, an oxygen-driven emergency resuscitator made from medical-grade silicone. This innovative device offers a cost-effective and mass-manufactured solution that provides continuous pressurized ventilation to patients automatically.

The PVC material segment is expected to exhibit the highest growth rate during the forecast period. Despite the fact that silicone resuscitators come at a higher initial cost compared to PVC or rubber alternatives, they prove to be more cost-effective in the long run when compared to disposable resuscitators. Consequently, there is a gradual increase in demand for PVC resuscitators.

Regional Insights

North America emerged as the dominant market leader in 2023, primarily due to the increasing prevalence of cardiac arrests and the rising demand for neonatal ventilation within the region. For instance, the United States hosted the inaugural virtual Resuscitation Science Symposium in November 2020, in collaboration with the American Heart Association. This symposium aimed to foster discussions on the latest advancements in resuscitation research and facilitate knowledge exchange among professionals.

Moreover, efforts to address out-of-hospital cardiac arrests are anticipated to fuel market growth in the region. Organizations like the Resuscitation Outcomes Consortium

(ROC) have been established to explore more effective approaches to managing cardiac arrest and trauma cases outside the hospital environment. With ten regional centers across the United States and Canada, the ROC plays a significant role in advancing research in this field.

Meanwhile, the Asia Pacific region is poised for the highest compound annual growth rate (CAGR) during the forecast period. The Government of India has launched initiatives to enhance in-hospital neonatal care as part of the National Health Mission 2015 and New-born Action Plan (NAP). These initiatives aim to equip 2,706 hospitals as primary referral units, establish 14,000 newborn care corners, and create 2,020 newborn stabilization units. The overarching objective of NAP is to reduce neonatal mortality rates to single-digit figures by 2030. These proactive measures are expected to drive market expansion in the region.

Key Market Players

Weinmann Emergency Medical Technology GmbH + Co KG

Laerdal Medical Corp

Ambu A/S

Medline Industries Inc

Hopkins Medical Products

ResMed Inc

Humana Inc.

CareFusion Corp

Report Scope:

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

Manual Resuscitators Market,By Type:

oSelf-inflating Resuscitator

oFlow-inflating Resuscitator

oT-piece

Manual Resuscitators Market,By Modality:

oDisposable

oReusable

Manual Resuscitators Market,By Material:

oSilicon

oPVC

oRubber

Manual Resuscitators Market,By Technology:

oPop-off Valve

oPEEP Valve

oOthers

Manual Resuscitators Market,By Patient Type:

oAdult

oPediatric

oOthers

Manual Resuscitators Market,By Application:

oChronic obstructive pulmonary disease

oCardiopulmonary arrest

oOthers

Manual Resuscitators Market,By End Use:

oHospital

oOut-of-hospital

oASC

oMilitary

oOthers

Manual Resuscitators Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

Germany

United Kingdom

France

Italy

Spain

oAsia-Pacific

China

Japan

India

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global

Manual Resuscitators Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Typ...

Manual Resuscitators Market.

Available Customizations:

Global Manual Resuscitators 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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