

# **North America Medical Oxygen Market Segmented By Form (Liquid Oxygen, Compressed Oxygen, Oxygen Gas Mixture), By Delivery Mode (Tanks/Pipeline, Cylinder, Others (Oxygen Cans, etc.)), By Application (Therapeutic, Diagnostic), By End-User (Hospitals & Clinics, Ambulatory Care Centers, Homecare, Others), By Country, Competition, Forecast & Opportunities, 2018-2028**

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## **Abstracts**

North America Medical Oxygen Market has valued at USD 3.66 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.68% through 2028. The North America Medical Oxygen Market is a critical component of the healthcare industry, providing a lifeline to patients with various respiratory conditions and playing a pivotal role in medical interventions. In this comprehensive market overview, we will delve into the key aspects of the North America Medical Oxygen Market, providing detailed insights into its size, growth drivers, challenges, and competitive landscape.

### **Key Market Drivers**

#### **Increasing Prevalence of Respiratory Disorders**

The aging demographic in North America is more susceptible to respiratory conditions such as chronic obstructive pulmonary disease (COPD) and sleep apnea. As the population ages, the prevalence of these conditions increases, driving the demand for medical oxygen therapy. Factors such as pollution, allergens, and lifestyle choices have

contributed to a rise in respiratory ailments across the region. These environmental elements further escalate the need for medical oxygen treatment. **Smoking Epidemic:** North America has faced a persistent issue with smoking, leading to a higher incidence of lung diseases. Smoking-related health concerns create a sustained demand for medical oxygen to manage associated respiratory issues.

### Technological Advancements in Oxygen Delivery Systems

The development of advanced portable oxygen concentrators has revolutionized oxygen therapy. These devices are lightweight, efficient, and offer greater mobility to patients, enhancing their quality of life. The convenience of these systems has significantly increased their adoption. Telehealth services have become increasingly prevalent in North America, especially following the COVID-19 pandemic. Oxygen therapy can now be monitored remotely, allowing for timely adjustments and reducing the need for in-person visits. **Precision and Customization:** Technological advancements have enabled precise control over oxygen delivery, tailoring treatment plans to individual patient needs. This personalization ensures the effectiveness of therapy, improving patient outcomes.

### Rising Healthcare Expenditure

Countries like Canada have universal healthcare systems that ensure access to essential medical services, including oxygen therapy, for all citizens. This stable demand is supported by government funding. In the United States, the presence of private healthcare providers and insurance companies has led to comprehensive coverage for medical oxygen therapy, reducing financial barriers for patients.

**Investment in Healthcare Infrastructure:** Both public and private sectors continue to invest in healthcare infrastructure, expanding the reach of medical services and increasing the accessibility of medical oxygen therapy. **Growing Awareness and Education**

### Growing Awareness and Education

Patients are becoming more informed about the benefits of medical oxygen therapy, particularly for respiratory conditions. Increased awareness has led to early diagnosis and treatment initiation. Healthcare professionals are receiving more extensive training in diagnosing and prescribing oxygen therapy. This ensures that patients who require medical oxygen receive it promptly. **Advocacy Organizations:** Organizations dedicated to respiratory health, such as the American Lung Association, play a crucial role in

raising awareness and advocating for oxygen therapy as a viable treatment option.

The North America Medical Oxygen Market's growth is driven by a convergence of factors, including the rising prevalence of respiratory disorders, technological advancements, increased healthcare expenditure, and growing awareness. These drivers collectively contribute to a robust and evolving market that continues to meet the critical oxygen therapy needs of the region's population.

## Key Market Challenges

### Supply Chain Disruptions

Supply chain disruptions have emerged as a major challenge in the North America Medical Oxygen Market, primarily due to the following reasons:

The COVID-19 pandemic highlighted the vulnerabilities in the medical oxygen supply chain. The surge in demand for oxygen during the pandemic, particularly for severe cases, strained existing supply networks. Ensuring the timely delivery of medical oxygen to healthcare facilities across a vast region like North America is a complex logistical task. Disruptions in transportation and distribution networks can lead to delays in oxygen delivery, potentially jeopardizing patient care. **North America Competition:** The North America demand for medical oxygen has increased, leading to competition for limited resources, including oxygen concentrators and cylinders. This North America competition can impact the availability of these essential oxygen delivery systems.

### Regulatory Compliance and Quality Control

Ensuring regulatory compliance and maintaining stringent quality control standards in the North America Medical Oxygen Market presents ongoing challenges:

The medical oxygen industry is subject to strict regulations and standards to ensure patient safety. Compliance with these regulations requires continuous monitoring, documentation, and adherence to best practices, which can be resource-intensive for manufacturers and providers. **Quality Assurance:** Maintaining the quality and purity of medical oxygen is paramount. Any compromise in quality can have severe consequences for patient health. Ensuring that oxygen is free from impurities and contaminants is an ongoing challenge. **Certification and Testing:** Medical oxygen equipment and systems must undergo rigorous certification and testing processes. These processes require time and resources, potentially affecting the speed at which

new technologies or products can be introduced to the market.

## Financial and Economic Pressures

Financial and economic pressures impact the North America Medical Oxygen Market in various ways, including:

Providing medical oxygen therapy, especially in homecare settings, can be expensive. Balancing the need to invest in advanced oxygen delivery systems and maintaining affordability for patients can be challenging. **Healthcare Budget Constraints:** Healthcare budgets in both the public and private sectors are subject to constraints. Budget limitations can limit investments in healthcare infrastructure, affecting the accessibility of oxygen therapy in certain regions or for specific populations. **Reimbursement Challenges:** In the United States, the intricacies of healthcare reimbursement can pose challenges for providers seeking reimbursement for oxygen therapy. Navigating the reimbursement landscape and ensuring that patients have access to affordable oxygen therapy can be complex.

## Key Market Trends

### Rise in Demand for Portable Oxygen Concentrators

There is a growing trend towards the adoption of portable oxygen concentrators (POCs) in the North America Medical Oxygen Market. This trend is fueled by several factors:

Patients are increasingly seeking oxygen therapy options that allow them to maintain an active and mobile lifestyle. POCs provide the flexibility for patients to move around, travel, and engage in daily activities while receiving oxygen therapy. Advances in POC technology have made these devices more efficient, lightweight, and user-friendly. They now offer longer battery life, improved oxygen delivery, and quieter operation, making them a preferred choice for patients. **Home Healthcare:** The trend towards home healthcare, especially in the wake of the COVID-19 pandemic, has accelerated the demand for POCs. These devices enable patients to receive oxygen therapy in the comfort and safety of their homes.

### Telehealth Integration for Oxygen Therapy Monitoring

The integration of telehealth services for the monitoring of oxygen therapy is a significant trend in the North America Medical Oxygen Market. This trend is driven by

several factors:

**Patient Convenience:** Telehealth services allow patients to connect with healthcare providers remotely for oxygen therapy monitoring and adjustments. This convenience reduces the need for frequent in-person visits, especially for patients with chronic conditions. **Real-Time Monitoring:** Telehealth platforms provide real-time data on patients' oxygen saturation levels and treatment adherence. This data enables healthcare providers to make timely adjustments to therapy and intervene in case of emergencies. **COVID-19 Impact:** The COVID-19 pandemic accelerated the adoption of telehealth across healthcare sectors, including oxygen therapy. Patients and providers became more accustomed to virtual consultations, leading to its continued use in the monitoring of oxygen therapy.

### Sustainability and Green Initiatives

There is a growing trend in the North America Medical Oxygen Market towards sustainability and green initiatives. This trend is motivated by several reasons:

**Environmental Concerns:** Increasing awareness of environmental issues has led healthcare providers and manufacturers to seek more sustainable practices in oxygen production and distribution. Reducing carbon emissions and environmental impact is a priority. **Green Technology:** Manufacturers are investing in green technology to minimize the ecological footprint of oxygen production. This includes using energy-efficient processes and exploring renewable energy sources for oxygen generation. **Regulatory Emphasis:** Regulatory agencies are increasingly focusing on sustainability and environmental impact. Compliance with green regulations and standards is becoming a competitive advantage for companies in the market.

### Segmental Insights

#### Form Insights

Based on the category of Form, the liquid oxygen segment emerged as the dominant player in the North America market for Medical Oxygen in 2022. Liquid oxygen, often abbreviated as LOX, is not a newcomer to the medical oxygen scene. Its origins date back to the early 20th century when scientists harnessed the cryogenic properties of oxygen, liquefying it at extremely low temperatures. This breakthrough paved the way for a more efficient and versatile form of medical oxygen therapy. One of the key factors that sets liquid oxygen apart is its exceptional purity. When oxygen is converted into

liquid form, impurities and contaminants are removed, resulting in a product that surpasses gaseous oxygen in terms of quality. This high level of purity is paramount in the medical field, where precision and safety are paramount. The liquid state of oxygen allows for efficient storage and transportation. Unlike compressed oxygen gas, which requires bulky cylinders, liquid oxygen can be stored in smaller, insulated containers. This not only saves space but also simplifies logistics, making it an attractive choice for medical facilities. Liquid oxygen's versatility extends to its ability to deliver customized treatment options. Medical professionals can adjust the flow rate and concentration of oxygen to meet the specific needs of patients, ensuring optimal care for a wide range of respiratory conditions. The liquid oxygen segment has made significant strides in the realm of home healthcare. Portable liquid oxygen systems have become increasingly popular, empowering patients with respiratory issues to maintain their independence while receiving the necessary treatment.

Additionally, Liquid oxygen systems are known for their efficiency in terms of oxygen supply duration. The conversion of liquid oxygen to a gaseous state occurs at the point of use, eliminating the risk of oxygen wastage. This translates into cost savings for both medical facilities and patients. Compared to traditional oxygen cylinders, liquid oxygen systems require less frequent refills. This not only saves time but also reduces the overall operational costs for healthcare providers, making it an economically viable choice. These factors are expected to drive the growth of this segment.

## Delivery Mode

Based on the category of Delivery Mode, the tanks/pipeline oxygen segment emerged as the dominant player in the North America market for Medical Oxygen in 2022. The tank/pipeline oxygen delivery mode is not a newcomer to the medical oxygen market. It has been the backbone of the industry for decades, offering a proven and trusted solution for delivering oxygen to patients in healthcare facilities. This long-standing reliability has contributed significantly to its dominance in the North American market. One of the primary advantages of the tank/pipeline delivery mode is its ability to provide a consistent and uninterrupted supply of oxygen. This is particularly critical in healthcare settings where patient well-being depends on the continuous availability of medical oxygen. Tanks and pipelines ensure that oxygen is readily accessible whenever and wherever it is needed. Tank/pipeline oxygen delivery offers unparalleled flexibility in healthcare settings. Large tanks can supply oxygen to entire hospital wings, while smaller, portable tanks serve individual patients. This adaptability ensures that medical facilities can cater to a wide range of patients with varying oxygen needs. These factors are expected to drive the growth of this segment.

## Application Insight

Based on the category of Application, the therapeutics segment emerged as the dominant player in the North America market for Medical Oxygen in 2022. The therapeutics segment is characterized by its remarkable versatility. It is employed in an array of medical applications, including but not limited to:

Oxygen therapy is administered to patients experiencing respiratory distress due to conditions such as chronic obstructive pulmonary disease (COPD), pneumonia, or asthma. It helps improve oxygen saturation levels in the blood, alleviating distress and preventing complications. After surgical procedures, patients may require oxygen therapy to aid in their recovery. This is crucial for maintaining proper oxygen levels during the healing process. Premature infants often require specialized oxygen therapy to support their underdeveloped respiratory systems. Therapeutic oxygen is indispensable in neonatal intensive care units (NICUs). With the advent of portable oxygen concentrators, patients are no longer confined to hospital rooms or their homes. They can enjoy an improved quality of life with the freedom to engage in various activities, travel, and spend time with their families.

Effective therapeutic oxygen therapy can prevent hospital readmissions and reduce the length of hospital stays for patients with chronic respiratory conditions. This not only benefits patients but also reduces healthcare costs. The therapeutics segment adheres to stringent safety and regulatory standards to ensure patient safety and the highest quality of care. This commitment to excellence further solidifies its position as a dominant force in the medical oxygen market.

## End-User Insights

The Homecare segment is projected to experience rapid growth during the forecast period. The Homecare segment is characterized by its unwavering commitment to patient-centered care. It acknowledges the importance of creating an environment where patients can receive medical oxygen therapy while enjoying the comforts and familiarity of their homes. This patient-centric approach is central to its dominance in the North American market. The aging population in North America is growing, and with it, the demand for home-based healthcare services, including oxygen therapy. As individuals age, the prevalence of chronic respiratory conditions and other ailments that necessitate oxygen therapy also increases. The Homecare segment has strategically positioned itself to cater to this expanding demographic.

One of the key advantages of the Homecare segment is the enhanced quality of life it offers to patients. Home-based oxygen therapy allows individuals to maintain their independence and continue engaging in daily activities, promoting a sense of normalcy despite medical conditions. Receiving medical care at home reduces the stress and anxiety often associated with hospital visits or extended stays. Patients can recuperate in a familiar and comfortable environment, surrounded by their loved ones. The Homecare segment provides specialized equipment and support tailored to the unique needs of individual patients. This includes portable oxygen concentrators, stationary oxygen systems, and a dedicated team of healthcare professionals who offer guidance, training, and round-the-clock assistance. Homecare providers ensure that patients have easy access to medical oxygen whenever needed. This accessibility is vital in emergencies or when patients require immediate intervention. These factors collectively contribute to the growth of this segment.

## Regional Insights

United States emerged as the dominant player in the North America Medical Oxygen market in 2022, holding the largest market share in terms of value. The U.S. boasts a vast and sophisticated healthcare infrastructure, including world-renowned hospitals, research institutions, and medical facilities. This extensive network ensures a constant demand for medical oxygen. The U.S. has a significant prevalence of respiratory conditions such as chronic obstructive pulmonary disease (COPD), asthma, and sleep apnea. This drives the demand for medical oxygen therapy. The country has a history of early adoption of advanced medical technologies, including cutting-edge oxygen delivery systems and portable concentrators, which cater to patient needs efficiently.

The Canada market is poised to be the fastest-growing market, offering lucrative growth opportunities for Medical Oxygen players during the forecast period. Factors such as Canada's universal healthcare system ensures that all citizens have access to medical services, including oxygen therapy. This stable demand provides a reliable market base. Similar to the United States, Canada is witnessing an aging population, leading to an increased prevalence of respiratory conditions. This demographic trend sustains the demand for medical oxygen. The Canadian government actively supports healthcare initiatives, including subsidies for medical oxygen equipment, ensuring accessibility for patients.

## Key Market Players



Linde PLC

Air Products and Chemicals Inc

Air Liquide SA

Messer SE & Co KGaA

Keen Compressed Gas Co

Atlas Copco AB

AGL Welding Supply Co., Inc.

Report Scope:

In this report, the North America Medical Oxygen Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Medical Oxygen Market, By Form:

Liquid Oxygen

Compressed Oxygen

Oxygen Gas Mixture

Medical Oxygen Market, By Delivery Mode:

Tanks/Pipeline

Cylinder

Others (Oxygen Cans, etc.)

Medical Oxygen Market, By Application:

Therapeutics

Diagnostics

Medical Oxygen Market, By End-User:

Hospitals & Clinics

Ambulatory Care Centers

Homecare

Others

Medical Oxygen Market, By Country:

United States

Canada

Mexico

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the North America Medical Oxygen Market.

Available Customizations:

North America Medical Oxygen 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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