

Oxygen Therapy Equipment Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product Type (Oxygen Source Equipment {Oxygen Cylinders, Oxygen Concentrators, Liquid Oxygen Devices, Others} v/s Oxygen Delivery Devices {Oxygen Masks, Nasal Cannula, Non-Rebreather Masks, Others}), Mobility (Stationary v/s Portable), By Application (COPD, Lung Cancer, Pneumonia, COVID-19, Others), By End User (Hospitals & Clinics, Ambulatory Care Centers, Homecare, Others) , By Region and Competition

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Abstracts

In 2022, the Global Oxygen Therapy Equipment Market reached a valuation of USD 10.83 Billion, and it is poised to exhibit impressive growth during the forecast period, maintaining a substantial Compound Annual Growth Rate (CAGR) of 6.22% through 2028. Oxygen therapy stands as a pivotal treatment approach for individuals in need of maintaining adequate oxygen levels. It is commonly employed in the management of conditions such as asthma, Chronic Obstructive Pulmonary Disease (COPD), sleep apnea, and other scenarios characterized by insufficient oxygen supply to patients.

Patients can access various types of oxygen therapy based on their specific requirements, including oxygen concentrators, liquid oxygen, and hyperbaric oxygen therapy. Oxygen therapy, as a medical intervention, harnesses oxygen gas to administer acute or chronic patient care, playing a critical role in supporting diverse cellular metabolic processes and promoting optimal physiological function through

tissue oxygenation.

Oxygen therapy becomes necessary when blood oxygen levels are below the required threshold. It can be administered through a range of methods, encompassing nasal delivery to hyperbaric oxygen therapy conducted within a closed environment. The respiratory system, comprising the lungs, nasal passages, and windpipe, facilitates the process of respiration. Air enters the body through the nose or mouth and travels through the windpipe, reaching the lungs via the bronchi. Oxygen therapy equipment serves as a dependable device that ensures a consistent supply of oxygen-enriched air. These devices effectively filter ambient air, removing dust, bacteria, and other particulates, thereby ensuring the purity of the delivered oxygen.

Key Market Drivers

Surge In the Latest Oxygen Therapy Solutions

The demand for the most minor, durable portable oxygen solutions is rising. Patients are increasingly seeking oxygen therapy options that are not only compact and long-lasting but also easy to carry. This preference arises from their desire to avoid the burden of lugging around a heavy and cumbersome oxygen device. Fortunately, recent years have witnessed significant advancements in oxygen-conserving methods and lithium-ion battery technology, particularly in terms of battery life improvement.

The latest versions of portable oxygen concentrators weigh a mere 5-7 pounds. These lightweight devices can provide oxygen therapy for extended periods, ranging from 8 to 13 hours, depending on the litre flow settings chosen by each patient, after a single battery charge. The focus of manufacturers has also shifted towards developing silent compressor motors for these concentrators, thereby reducing noise pollution in small and confined spaces.

Moreover, the effective utilization of dosing technology has enabled portable oxygen concentrator manufacturers to enhance their products' performance features. This, in turn, has resulted in current designs that offer a longer lifespan beyond occasional use, making them more reliable and durable for a consistent five-year cycle. With these advancements and improvements, patients can now enjoy the benefits of portable oxygen therapy without compromising on convenience, reliability, and longevity.

Increase in Tobacco Smoking

The increase in tobacco smoking is expected to drive up the demand for oxygen therapy equipment, as smoking-related health issues continue to be a major public health concern worldwide. Smoking is a leading cause of various respiratory conditions, including chronic obstructive pulmonary disease (COPD) and lung cancer, which often necessitate oxygen therapy as part of the treatment and management plan.

COPD, a progressive lung disease commonly linked to smoking, can severely impact a person's ability to breathe efficiently. As the condition worsens, individuals often experience oxygen deficiency, requiring supplemental oxygen therapy to maintain adequate blood oxygen levels. With the rising number of COPD cases due to smoking, there is a growing need for oxygen concentrators, portable oxygen tanks, and other oxygen delivery systems to improve the quality of life for affected individuals.

Moreover, smoking is a significant risk factor for lung cancer, and patients undergoing lung cancer treatments may also require oxygen therapy to manage symptoms and side effects. As the global incidence of lung cancer continues to rise due to smoking habits, the demand for oxygen therapy equipment, such as oxygen concentrators and oxygen masks, is likely to increase in tandem. The increase in tobacco smoking-related health conditions underscores the vital role that oxygen therapy equipment plays in managing and improving the lives of affected individuals. As smoking-related respiratory diseases continue to pose a significant global health challenge, the demand for oxygen therapy equipment is expected to grow, necessitating ongoing advancements and innovations in this critical medical field.

Rising Prevalence of Respiratory Diseases

The rising prevalence of respiratory diseases is expected to drive a significant increase in the demand for oxygen therapy equipment, marking a crucial facet of modern healthcare. Respiratory diseases such as chronic obstructive pulmonary disease (COPD), asthma, pneumonia, and interstitial lung diseases are on the rise globally, and they often necessitate the use of oxygen therapy to manage symptoms and improve patients' quality of life.

Chronic respiratory conditions like COPD have become a major public health concern, particularly due to factors such as air pollution, smoking, and an aging population. Patients with COPD often experience difficulty in breathing and require supplemental oxygen to maintain adequate blood oxygen levels. This growing demographic has led to an increased demand for oxygen concentrators, portable oxygen tanks, and other oxygen delivery systems.

Asthma, another common respiratory ailment, affects millions of people worldwide, and severe asthma attacks can lead to oxygen deprivation. Oxygen therapy is often crucial in stabilizing patients during acute asthma exacerbations, further contributing to the demand for oxygen-related equipment. The COVID-19 pandemic also highlighted the importance of oxygen therapy equipment as hospitals worldwide faced surges in patients with severe respiratory symptoms. This emphasized the necessity for having adequate oxygen infrastructure in healthcare facilities, further underscoring the demand for oxygen concentrators and ventilators.

Furthermore, as healthcare trends shift towards home-based care and telemedicine, the demand for portable and user-friendly oxygen therapy equipment for patients managing chronic respiratory conditions at home is increasing.

Technological Advancement in Oxygen Therapy

Technological advancements in the field of oxygen therapy are poised to revolutionize the healthcare industry, driving an unprecedented surge in the demand for oxygen therapy equipment. These innovations are not only improving the efficacy of treatment but also enhancing patient comfort and accessibility, thus reshaping the landscape of respiratory care.

One significant development is the proliferation of portable oxygen concentrators (POCs) that offer patients the freedom to receive oxygen therapy while on the move. These lightweight and compact devices are equipped with advanced battery technology, ensuring extended runtime, and they allow patients to maintain an active lifestyle, contributing to an increased quality of life. As the aging population continues to grow, the demand for POCs is expected to soar, as they enable seniors to remain independent and engaged in their communities.

Moreover, telemedicine and remote monitoring solutions have emerged as powerful tools in oxygen therapy management. The integration of smart sensors and wireless connectivity enables healthcare professionals to remotely track patients' oxygen levels, adjust treatment plans in real-time, and provide immediate support when necessary. This not only enhances the overall patient experience but also reduces the burden on healthcare facilities and staff.

Key Market Challenges

Stringent Regulatory Guidelines

Stringent regulatory guidelines in the healthcare industry have the potential to significantly decrease the demand for oxygen therapy equipment. While regulations are essential for ensuring patient safety and treatment efficacy, an excessively complex or burdensome regulatory environment can create obstacles that hinder innovation, drive up costs, and limit market access for manufacturers and healthcare providers. Rigorous regulatory processes can slow down the introduction of new and improved oxygen therapy equipment to the market. This delay can have serious consequences, as patients may miss out on potentially more effective treatments or innovations that enhance their quality of life. Healthcare providers may also be discouraged from adopting new technologies due to the uncertainties and complexities associated with regulatory approval, further stifling demand.

Additionally, stringent guidelines can lead to a limited selection of available equipment, reducing competition and innovation within the industry. This lack of variety can result in fewer options for patients and healthcare professionals, making it harder to find solutions that best meet individual needs. While regulatory guidelines are crucial for ensuring patient safety and treatment effectiveness, excessively stringent regulations can create barriers that diminish the demand for oxygen therapy equipment. Striking the right balance between regulation and innovation is essential to ensure that patients have access to the most advanced and affordable respiratory care solutions.

Frequent Adverse Effects

The market expansion for oxygen treatment is being constrained by their unfavorable side effects, which, when used therapeutically, include skin irritation and nasal dryness. Dryness of the nose and skin irritation are two of the most typical side effects of oxygen therapy. The cannula may rub against the skin and create irritation.

Moreover, prolonged exposure to high oxygen concentrations can lead to an increased risk of oxygen toxicity, which can seriously harm not only the lungs but also other organ systems. Inappropriate or excessive supplemental oxygen can result in oxygen toxicity, causing detrimental effects on lung function and overall health. This can potentially lead to lung injury and impair the body's ability to effectively exchange gases.

Additionally, the range of lung ailments that can be induced by oxygen therapy extends beyond minor tracheobronchitis to include widespread alveolar damage. The excessive production of free radicals due to long-term exposure to high oxygen concentrations can

further contribute to lung injury and hinder the overall effectiveness of oxygen therapy.

Considering these factors, it becomes evident that the presence of such side effects and potential risks associated with oxygen therapy may pose challenges in the expansion of the oxygen therapy equipment market.

Key Market Trends

Technology Advancements in Therapeutic Equipment

Due to the significant increase in the number of individuals with respiratory conditions who rely on oxygen therapy devices (OTD), healthcare facilities are facing immense pressure to effectively manage patients who require constant OTD support. This growing demand is driving the market for oxygen therapy solutions. As wearable technology continues to advance, with notable improvements in Photoplethysmography (PPG) sensors and wireless 5G connectivity, it is expected that the trend of ****digital health**** data transfer for oxygen therapy monitoring will experience rapid growth.

PPG, a non-invasive device, accurately measures volumetric fluctuations in blood circulation by utilizing a light source and a photodetector placed on the skin's surface. Wearable PPG sensors can be comfortably accommodated on specific body parts such as fingertips, earlobes, and the forehead. Moreover, with the increasing utilization and adoption of remote patient monitoring systems, patients are becoming more actively engaged in their own care, thanks to proper instruction in the use of these systems. These advancements and patient involvement hold promising prospects for the market's growth and profitability.

Advanced Portable Oxygen Solutions

Portable oxygen concentrators (POCs) and lightweight, wearable devices will continue to evolve. These innovations will allow patients to receive oxygen therapy while maintaining an active lifestyle and even traveling, contributing to a better quality of life. POCs will continue to become smaller and lighter, making them highly portable. These devices will be easier to carry in backpacks or even wear as discreet accessories. Patients will have the freedom to move around without the burden of bulky equipment.

Battery technology will advance, providing POCs with longer runtime. This means patients can go longer periods without needing to recharge or replace their batteries, making travel and outdoor activities more practical. POCs will feature wireless

connectivity options, allowing for remote monitoring by healthcare providers and caregivers. Real-time data on oxygen levels and usage patterns can be transmitted, enabling timely adjustments to treatment plans and better support. These advancements will collectively empower patients to lead more active and fulfilling lives while managing their oxygen therapy needs. With greater portability, convenience, and connectivity, patients will be better equipped to maintain an active lifestyle, travel, and participate in a wide range of activities, ultimately contributing to an improved quality of life for individuals with respiratory conditions.

Segmental Insights

Mobility Insights

Based on the mobility segment, the stationary oxygen therapy equipment devices is projected to dominate the market in terms of portability. This is primarily due to the fact that a significant number of patients receiving treatment are confined to beds, thus making the fixed oxygen therapy equipment market the key driver and contributor to maximum market revenue throughout the projection period.

The expansion of this category can be attributed to several factors, including a rising population base, favourable reimbursement policies, and a low mobility profile of patients. As a result, there is an increased demand for long-term oxygen therapy (LTOT) equipment in residential settings, which is expected to further boost the overall demand for oxygen therapy equipment over the projected period. The utilization of LTOT equipment in residential settings not only provides enhanced convenience and comfort for patients but also contributes to the overall improvement in their quality of life.

Application Insights

Based on the Application, the market is bifurcated into Chronic Obstructive Pulmonary Disease (COPD), Lung Cancer, Pneumonia, COVID-19, and others. Among these, the Chronic Obstructive Pulmonary Disorder (COPD) segment dominates the market with the largest share, owing to the increasing prevalence of COPD worldwide. According to estimates by the World Health Organization (WHO), approximately 65 million individuals are currently suffering from COPD, making it the fifth-leading cause of death globally. This alarming statistic highlights the urgent need for effective COPD therapy and creates a significant clinical demand in the market, which in turn contributes to the growth of companies operating in this domain. With the rising prevalence of COPD, there is an increasing focus on developing innovative treatment solutions to address this

chronic respiratory disorder and improve the quality of life for affected individuals.

Regional Insights

During the forecast period, North America is anticipated to maintain its dominance in the global oxygen therapy equipment market. This is attributed to the increasing prevalence of respiratory diseases like COPD, asthma, and carbon monoxide poisoning.

Additionally, the rising number of Covid-19 cases in the region is expected to drive the demand for oxygen therapy equipment in the coming years.

Moreover, the United States holds the largest share in the global oxygen therapy equipment market, mainly due to its well-established healthcare infrastructure and the growing adoption of advanced non-invasive patient monitoring technologies.

Furthermore, the presence of key market players such as Koninklijke Philips N.V., Invacare Corporation, and Inogen, Inc. is expected to further propel the oxygen therapy equipment market.

Considering various factors, including a sizable patient population and the introduction of new products in the region, the North American oxygen therapy equipment market is projected to witness significant growth during the forecast period.

Key Market Players

Allied Healthcare Products, Inc.

CAIRE Inc.

DeVilbiss Healthcare

Fisher & Paykel Healthcare Limited

Inogen Inc.

Invacare Corporation

Koninklijke Philips N.V.,

Smith's Medical, Inc.

Taiyo Nippon Sanso Corporation

Linde Healthcare

Report Scope:

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

Oxygen Therapy Equipment Market, By Product Type:

Oxygen Source Equipment

Oxygen Delivery Devices

Oxygen Therapy Equipment Market, By Mobility:

Stationary

Portable

Oxygen Therapy Equipment Market, By Application:

COPD

Lung Cancer

Pneumonia

COVID-19

Others

Oxygen Therapy Equipment Market, By End User:

Hospitals & Clinics

Ambulatory Care Centres

Homecare

Others

Oxygen Therapy Equipment 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

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Oxygen Therapy Equipment Market.

Available Customizations:

Global Oxygen Therapy Equipment 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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