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Sleep Testing Services Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Diagnostic Service (Home Sleep Testing, In-Lab Testing, Multiple Sleep Latency Test), By Application (Sleep Apnea, Insomnia, Restless Legs Syndrome, Narcolepsy, Others), By End user (Hospitals, Sleep Centers, In-Home Care), By Region & Competition, 2021-2031F

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Abstracts

The Global Sleep Testing Services Market is projected to expand from USD 8.07 Billion in 2025 to USD 12.01 Billion by 2031, registering a CAGR of 6.85%. These services encompass diagnostic medical procedures conducted either in clinical laboratories or through portable home devices aimed at identifying conditions such as obstructive sleep apnea and narcolepsy. Key factors driving this growth include the rising global incidence of sleep disorders and an aging population that is increasingly prone to respiratory issues. Furthermore, the growing clinical acknowledgment of the link between untreated sleep apnea and chronic cardiovascular diseases is fueling the demand for diagnostic assessments. Highlighting this prevalence, the American Academy of Sleep Medicine estimated in 2024 that nearly 30 million adults in the United States suffer from obstructive sleep apnea.

However, market expansion faces significant hurdles due to the high costs associated with comprehensive laboratory testing and the complex reimbursement frameworks governing these procedures. Inconsistent insurance coverage often discourages patients from seeking necessary diagnostics, while the substantial expense of maintaining specialized sleep centers restricts accessibility in developing regions.

Additionally, a scarcity of trained technologists capable of interpreting complex diagnostic results creates operational bottlenecks. Collectively, these financial and resource limitations continue to hinder the widespread adoption of sleep testing services on a global scale.

Market Driver

The escalating prevalence of Obstructive Sleep Apnea (OSA) and chronic sleep disorders serves as the primary engine driving the growth of the Global Sleep Testing Services Market. This expansion is intrinsically tied to increasing global obesity rates and a rapidly aging population, both of which represent high-risk groups for respiratory complications. The clinical recognition of comorbidities, specifically the association between untreated sleep apnea and cardiovascular health, has further emphasized the need for diagnostic evaluations. Reinforcing this urgency, the National Council on Aging reported in a June 2025 article titled 'Sleep Apnea in Older Adults' that studies suggest 56% of individuals aged 65 and older are at high risk for developing obstructive sleep apnea, underscoring the critical need for accessible diagnostic services for this vulnerable demographic.

Concurrently, the market is being propelled by the rapid adoption of cost-efficient Home Sleep Apnea Testing (HSAT) devices and technological breakthroughs in remote diagnostics. The transition from expensive, complex in-lab polysomnography to user-friendly, portable home testing solutions has broadened access to sleep healthcare, aided by favorable reimbursement policies and the integration of AI-driven analytics. This trend is reflected in the financial results of major industry players capitalizing on remote care demand. For instance, Royal Philips reported in its 'Third quarter 2025 results' in November 2025 that its Sleep & Respiratory Care business achieved comparable sales growth of 5.1%, driven by connected care solutions. Similarly, ResMed reported a 10% revenue increase to $1.3 billion in its second quarter of 2025, highlighting the sustained financial momentum within the sleep health sector.

Market Challenge

A critical restraint on the Global Sleep Testing Services Market is the chronic shortage of trained sleep technologists, which directly limits the industry?s ability to handle diagnostic volumes. Sleep diagnostic procedures, especially in-lab polysomnography, are labor-intensive and require highly specialized professionals to manage patient instrumentation, monitor real-time physiological signals, and interpret complex data. When clinical laboratories lack sufficient staffing, they are often forced to decrease their

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operational bed count or restrict appointment availability. This operational bottleneck leads to prolonged patient wait times and lost revenue, as facilities find themselves physically unable to meet the growing demand for sleep apnea evaluations.

This workforce contraction has been quantified by key industry organizations, indicating a severe retention crisis. In 2024, the American Association of Sleep Technologists reported that its active membership had fallen to just over 2,000 professionals, signaling a significant reduction in the specialized workforce. This decline in available certified personnel creates a competitive hiring landscape that drives up operational costs while simultaneously limiting the volume of tests that can be conducted. Consequently, market growth is artificially capped, not by a lack of patient demand, but by the tangible inability of service providers to scale their human resources sufficiently to perform necessary diagnostics.

Market Trends

The convergence of clinical and consumer wearable technologies is fundamentally reshaping the market by converting widely used lifestyle devices into regulated medical screening tools. Unlike traditional Home Sleep Apnea Testing (HSAT), which relies on specific dispatched hardware, this trend leverages existing smartwatches to passively assess sleep apnea risk, thereby significantly lowering the barriers to diagnostic evaluation. Tech giants are aggressively entering this regulated sector, utilizing advanced sensors and algorithms to identify undiagnosed patients on a massive scale. According to an AppleInsider article from September 2024 titled 'FDA approves Apple Watch sleep apnea detection,' the newly cleared feature is scheduled to roll out to over 150 countries, instantly extending preliminary sleep screening capabilities to a vast global population that previously lacked access to conventional diagnostic avenues.

Simultaneously, the shift toward contactless and radar-based sleep sensing marks a critical evolution toward longitudinal, zero-friction monitoring solutions that resolve compliance issues associated with wearable sensors. This trend emphasizes 'nearable' technologies, such as under-mattress pneumatic mats and bedside radar units, capable of capturing continuous physiological data over weeks or months rather than a single night. This capability is vital for detecting condition variability that sporadic testing frequently overlooks. Emphasizing the clinical necessity of this approach, a September 2024 Fierce Biotech article titled 'FDA clears Withings contactless mattress mat' noted that a study of over 11 million nights demonstrated high variability in sleep apnea severity, proving that long-term, contactless data collection offers superior accuracy in characterizing chronic sleep disorders compared to point-in-time testing.

Key Market Players

%li%ResMed

%li%Philips Respironics

%li%Nox Medical

%li%Compumedics

%li%Itamar Medical

%li%Fisher & Paykel Healthcare

%li%Natus Medical

%li%Welch Allyn

%li%SleepMed

%li%Drive DeVilbiss

Report Scope

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

%li%Sleep Testing Services Market, By Diagnostic Service

%li%%li%Home Sleep Testing

%li%%li%In-Lab Testing

%li%%li%Multiple Sleep Latency Test

%li%Sleep Testing Services Market, By Application

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%li%%li%Sleep Apnea

%li%%li%Insomnia

%li%%li%Restless Legs Syndrome

%li%%li%Narcolepsy

%li%%li%Others

%li%Sleep Testing Services Market, By End user

%li%%li%Hospitals

%li%%li%Sleep Centers

%li%%li%In-Home Care

%li%Sleep Testing Services Market, By Region

%li%%li%North America

%li%%li%%li%United States

%li%%li%%li%Canada

%li%%li%%li%Mexico

%li%%li%Europe

%li%%li%%li%France

%li%%li%%li%United Kingdom

%li%%li%%li%Italy

%li%%li%%li%Germany

%li%%li%%li%Spain

%li%%li%Asia Pacific

%li%%li%%li%China

%li%%li%%li%India

%li%%li%%li%Japan

%li%%li%%li%Australia

%li%%li%%li%South Korea

%li%%li%South America

%li%%li%%li%Brazil

%li%%li%%li%Argentina

%li%%li%%li%Colombia

%li%%li%Middle East & Africa

%li%%li%%li%South Africa

%li%%li%%li%Saudi Arabia

%li%%li%%li%UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Sleep Testing Services Market.

Available Customizations:

Global Sleep Testing Services Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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Company Information

%li%Detailed analysis and profiling of additional market players (up to five).

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