

Breath Analyzer Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis By Technology (Fuel Cell Technology, Semiconductor Sensor, Infrared Spectroscopy, and Others), Application (Drug Abuse Detection, Alcohol Detection, and Medical Applications), End User (Law Enforcement Agencies, Hospital & Diagnostic Centers, and Others), and Geography (North America, Europe, Asia Pacific, South & Central America, and Middle East & Africa)

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Abstracts

The breath analyzers market is expected to grow from US\$ 1.188 billion in 2022 to US\$ 3.685 billion by 2030; it is expected to grow at a CAGR of 15.19% from 2022 to 2030. The growing alcohol consumption and alcohol-impaired accidents and false results by breath analyzers are the noteworthy factors driving the breath analyzers market growth.

A breath analyzers device is used to determine the amount of alcohol in the system of persons suspected of being intoxicated or to detect the presence of infection or disease. Also, several breath analyzers devices are still in the development phase for the detection of disease and infectious agents. For example, a breath analyzers may be developed for sensitivity to certain volatile organic compounds (VOCs) in the breath that are associated with the presence of disease.

Government Support and Advanced Technologies Implementation for Breath Analyzers

According to the WHO 2023 report, after the contentious debate, Brazil's supreme court declared the country's 'Drink-Driving Law' completely constitutional in August 2022. This is due to crashes standing as one of the top three causes of death among Brazilian population aged between 5 and 39 years. Among these deaths, alcohol consumption-led accidents account for nearly 10% of all deaths due to road traffic crashes in the country. Also, Brazil's supreme court implemented and announced that the police would carry the breath analyzers tests and administer drinkers to control alcohol-related road traffic crashes and deaths in the future. Such implementation makes the 'Drink-Driving Law' completely workable and fully enforceable.

In November 2021, Congress mandated that all cars must have an in-built advanced drunk and impaired driving prevention technology capable of detecting drunk drivers by the police. The mandate was included in the US\$ 1.5 trillion infrastructure bill that was signed in 2021. Also, in the US, some states already incorporated in-car breath analyzers for people called 'ignition interlock devices.' These ignition interlock devices require drivers to blow an alcohol-free breath into a tube before the car will start. Despite this technology, Congress's mandate for 'advanced drunk and impaired driving prevention technology' is a more advanced technology than breath analyzers that involve sensors collecting data about the driver's body and detecting whether the alcohol is consumed by the driver or not. Thus, government support and implementation of new advanced technologies to detect alcohol-impaired drivers resulting in controlling road traffic crashes boost the breath analyzers market growth.

Market Opportunity

Favorable and Supportive Regulations for Adoption of Breath Analyzers and Innovative Product Launches by Manufacturers

Market players launch innovative products such as 'Contact-Free Breath Analyzer.' In May 2023, Cannabix Technologies Inc., a manufacturer of breath testing devices, announced the development of contactless alcohol breathalyzer (CAB) technology in the workplace and in-cabin vehicles. The company ran a pilot testing of its workplace CAB in Montana-based Friedel LLC in March 2023. Since then, the device has been performing well, with over 300 breath samples taken till today. The company's CAB product has received strong interest from the US and Australia for the development and commercialization of a CAB product targeting small to medium-sized enterprises (SMEs). The CAB product proves especially effective with pre-alcohol testing before and during work hours of an employee. Furthermore, the device can be utilized in bars, restaurants, hotels, and organizations.

Further, in June 2021, the Breath Alcohol Permit Program approved breath analysis instruments and full-fledged incorporated by the US Department of Transportation/National Highway Traffic Safety Administration (NHTSA). Thus, launches of innovative products and fast approvals by the regulatory/authorized bodies for the adoption of breath analyzers are expected to provide lucrative opportunities for the breath analyzers manufacturers in the long run.

The “Global Breath Analyzer Market” is segmented on the basis of technology, application, end user, and geography. Based on technology, the market is segmented into fuel cell technology, semiconductor sensor, infrared spectroscopy, and others. In 2022, the fuel cell technology segment held the largest share of the market. Breath analyzers working on fuel cell technology consist of sensor devices comprising a platinum (Pt) anode compartment and a cathode to react with the ethanol and water in the breath sample during the breath test. To ensure accuracy, a precise sampling pump is utilized to draw the sample, specifically chosen to fit the fuel cell's specifications. The fuel cell sensor circuit produces an electric potential without any need for a power source during the oxidation reaction of ethanol in the sample. Fuel cell technology offers a perfect solution for portable screening devices due to its compact size and low power consumption. Law enforcement agencies commonly rely on electrochemical fuel cell technology for handheld screening devices, which provide highly accurate results. Although fuel cell breath analyzers may require a higher manufacturing cost, their reliability and precision make them a worthwhile investment. Overall, fuel cell technology presents an exciting opportunity for advancing screening capabilities and enhancing public safety. Therefore, the applications mentioned above drive the breath analyzers market growth for the fuel cell technology segment.

Application-Based Insights

Based on application, the global breath analyzer market is segmented as drug abuse detection, alcohol detection, and medical applications. The medical application segment held the largest market share in 2022 and is anticipated to register the highest CAGR during 2022–2030. In recent years, breath analysis has emerged as one of the most promising noninvasive diagnostic methods, attracting significant research interest. The method involves detecting gas analytes such as exhaled volatile organic compounds (VOCs) and inorganic gases, which are considered essential biomarkers for various diseases. Recent advancements in metabolomics have led to improved capabilities to explore human metabolic profiles in breath. Despite some challenges in sampling and analysis, exhaled breath is a desirable medium for metabolomics applications. It is

convenient and practically limitless in availability. Currently, several breath-based tests are established and in practical and clinical use. In an article published by Biomedical Signal Processing and Control in September 2021, a study carried out using a breath analyzer for the assessment of patients' breath print to diagnose chronic kidney disease resulted in 85.7% accuracy using Fast Fourier Transform (FFT) coefficient as feature sets.

In April 2022, the US FDA issued an emergency use authorization (EUA) for the first InspectIR COVID-19 Breathalyzer that detects chemical compounds in breath samples to diagnose SARS-CoV-2 infection.

European Medicines Agency, Emergency Use Authorization, Centers for Disease Control and Prevention, International Diabetes Federation, are some of the relevant sources referred while preparing the breath analyzers market research report.

Contents

1. INTRODUCTION

- 1.1 The Insight Partners Research Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Breath Analyzer Market, by Geography (US\$ Million)

3. RESEARCH METHODOLOGY

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

4. BREATH ANALYZER MARKET LANDSCAPE

- 4.1 Overview
- 4.2 PEST Analysis
 - 4.2.1 PEST Analysis

5. BREATH ANALYZER MARKET - KEY INDUSTRY DYNAMICS

- 5.1 Key Market Drivers
 - 5.1.1 Growing Alcohol Consumption and Alcohol-Impaired Accidents
 - 5.1.2 Government Support and Advanced Technologies Implementation for Breath Analyzers
- 5.2 Key Market Restraints
 - 5.2.1 False Results by Breath Analyzers
- 5.3 Key Market Opportunities
 - 5.3.1 Favorable and Supportive Regulations for Adoption of Breath Analyzers and Innovative Product Launches by Manufacturers
- 5.4 Future Trends
 - 5.4.1 Technological Advancements in Breath Analyzers

6. BREATH ANALYZER MARKET - GLOBAL MARKET ANALYSIS

6.1 Breath Analyzer Market Revenue (US\$ Mn), 2022 – 2030

7. GLOBAL BREATH ANALYZER MARKET – REVENUE AND FORECAST TO 2030 – BY TECHNOLOGY

7.1 Overview

7.2 Breath Analyzer Market Revenue Share, by Technology 2022 & 2030 (%)

7.3 Fuel Cell Technology

7.3.1 Overview

7.3.2 Fuel Cell Technology: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

7.4 Semiconductor Sensor

7.4.1 Overview

7.4.2 Semiconductor Sensor: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

7.5 Infrared Spectroscopy

7.5.1 Overview

7.5.2 Infrared Spectroscopy Sensor: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

7.6 Others

7.6.1 Overview

7.6.2 Others: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

8. GLOBAL BREATH ANALYZER MARKET – REVENUE AND FORECAST TO 2030 – BY APPLICATION

8.1 Overview

8.2 Breath Analyzer Market Revenue Share, by Application 2022 & 2030 (%)

8.3 Drug Abuse Detection

8.3.1 Overview

8.3.2 Drug Abuse Detection: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

8.4 Alcohol Detection

8.4.1 Overview

8.4.2 Alcohol Detection: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

8.5 Medical Applications

8.5.1 Overview

8.5.2 Medical Applications: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

9. GLOBAL BREATH ANALYZER MARKET – REVENUE AND FORECAST TO 2030 – BY END USER

9.1 Overview

9.2 Breath Analyzer Market Revenue Share, by End User 2022 & 2030 (%)

9.3 Law Enforcement Agencies

9.3.1 Overview

9.3.2 Law Enforcement Agencies: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

9.4 Hospital & Diagnostic Centers

9.4.1 Overview

9.4.2 Hospital & Diagnostic Centers: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

9.5 Others

9.5.1 Overview

9.5.2 Others: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10. BREATH ANALYZER MARKET – REVENUE AND FORECAST TO 2030 – GEOGRAPHIC ANALYSIS

10.1 North America: Breath Analyzer Market

10.1.1 Overview

10.1.2 North America: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.1.3 North America: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)

10.1.4 North America: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)

10.1.5 North America: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)

10.1.6 North America: Breath Analyzer Market, by Country

10.1.6.1 US: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.1.6.1.1 Overview

10.1.6.1.2 US: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.1.7 US: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)

10.1.8 US: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)

- 10.1.9 US: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.1.9.1 Canada: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.1.9.1.1 Overview
 - 10.1.9.1.2 Canada: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.1.10 Canada: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.1.11 Canada: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
 - 10.1.12 Canada: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.1.12.1 Mexico: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.1.12.1.1 Overview
 - 10.1.12.1.2 Mexico: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.1.13 Mexico: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.1.14 Mexico: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
 - 10.1.15 Mexico: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
- 10.2 Europe: Breath Analyzer Market
 - 10.2.1 Overview
 - 10.2.2 Europe: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.2.3 Europe: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.2.4 Europe: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
 - 10.2.5 Europe: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.2.6 Europe: Breath Analyzer Market, by Country
 - 10.2.6.1 Germany: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.2.6.2 Overview
 - 10.2.6.2.1 Germany: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.2.7 Germany: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.2.8 Germany: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
 - 10.2.9 Germany: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.2.9.1 France: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.2.9.1.1 Overview
 - 10.2.9.1.2 France: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.2.10 France: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.2.11 France: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)

- 10.2.12 France: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.2.12.1 UK: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.2.12.1.1 Overview
 - 10.2.12.1.2 UK: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
- 10.2.13 UK: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
- 10.2.14 UK: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
- 10.2.15 UK: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.2.15.1 Italy: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.2.15.1.1 Overview
 - 10.2.15.1.2 Italy: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
- 10.2.16 Italy: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
- 10.2.17 Italy: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
- 10.2.18 Italy: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.2.18.1 Spain: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.2.18.1.1 Overview
 - 10.2.18.1.2 Spain: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
- 10.2.19 Spain: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
- 10.2.20 Spain: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
- 10.2.21 Spain: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.2.21.1 Rest of Europe: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.2.21.1.1 Overview
 - 10.2.21.1.2 Rest of Europe: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
- 10.2.22 Rest of Europe: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
- 10.2.23 Rest of Europe: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
- 10.2.24 Rest of Europe: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
- 10.3 Asia Pacific: Breath Analyzer Market
 - 10.3.1 Overview
 - 10.3.2 Asia Pacific: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

- 10.3.3 Asia Pacific: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
- 10.3.4 Asia Pacific: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
- 10.3.5 Asia Pacific: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
- 10.3.6 Asia Pacific: Breath Analyzer Market, by Country
 - 10.3.6.1 China: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.3.6.1.1 Overview
 - 10.3.6.1.2 China: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.3.7 China: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.3.8 China: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
 - 10.3.9 China: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.3.9.1 Japan: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.3.9.1.1 Overview
 - 10.3.9.1.2 Japan: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.3.10 Japan: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.3.11 Japan: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
 - 10.3.12 Japan: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.3.12.1 India: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.3.12.1.1 Overview
 - 10.3.12.1.2 India: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.3.13 India: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.3.14 India: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
 - 10.3.15 India: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.3.15.1 Australia: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.3.15.1.1 Overview
 - 10.3.15.1.2 Australia: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.3.16 Australia: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.3.17 Australia: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
 - 10.3.18 Australia: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.3.18.1 South Korea: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.3.18.1.1 Overview

- 10.3.18.1.2 South Korea: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
- 10.3.19 South Korea: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
- 10.3.20 South Korea: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
- 10.3.21 South Korea: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.3.21.1 Rest of Asia Pacific: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.3.21.1.1 Overview
 - 10.3.21.1.2 Rest of Asia Pacific: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
- 10.3.22 Rest of Asia Pacific: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
- 10.3.23 Rest of Asia Pacific: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
- 10.3.24 Rest of Asia Pacific: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
- 10.4 Middle East & Africa: Breath Analyzer Market
 - 10.4.1 Overview
 - 10.4.2 Middle East & Africa: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.4.3 Middle East & Africa: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.4.4 Middle East & Africa: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
 - 10.4.5 Middle East & Africa: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.4.6 Middle East & Africa: Breath Analyzer Market, by Country
 - 10.4.6.1 South Africa: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.4.6.1.1 Overview
 - 10.4.6.1.2 South Africa: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)
 - 10.4.7 South Africa: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)
 - 10.4.8 South Africa: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)
 - 10.4.9 South Africa: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)
 - 10.4.9.1 Saudi Arabia: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.4.9.1.1 Overview

10.4.9.1.2 Saudi Arabia: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.4.10 Saudi Arabia: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)

10.4.11 Saudi Arabia: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)

10.4.12 Saudi Arabia: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)

10.4.12.1 UAE: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.4.12.1.1 Overview

10.4.12.1.2 UAE: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.4.13 UAE: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)

10.4.14 UAE: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)

10.4.15 UAE: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)

10.4.15.1 Rest of Middle East & Africa: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.4.15.1.1 Overview

10.4.15.1.2 Aforementioned factors are responsible for the growth of the breath analyzer market in the Rest of Middle East & Africa.

10.4.15.1.3 Rest of Middle East & Africa: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.4.16 Rest of Middle East & Africa: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)

10.4.17 Rest of Middle East & Africa: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)

10.4.18 Rest of Middle East & Africa: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)

10.5 South & Central America: Breath Analyzer Market

10.5.1 Overview

10.5.2 South & Central America: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.5.3 South & Central America: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)

10.5.4 South & Central America: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)

10.5.5 South & Central America: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)

10.5.6 South & Central America: Breath Analyzer Market, by Country

10.5.6.1 Brazil: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.5.6.1.1 Overview

10.5.6.1.2 Such factors mentioned above are responsible for the growth of the breath analyzer market in Brazil.

10.5.6.1.3 Brazil: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.5.7 Brazil: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)

10.5.8 Brazil: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)

10.5.9 Brazil: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)

10.5.9.1 Argentina: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.5.9.1.1 Overview

10.5.9.1.2 Argentina: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.5.10 Argentina: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)

10.5.11 Argentina: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)

10.5.12 Argentina: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)

10.5.12.1 Rest of South & Central America: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.5.12.1.1 Overview

10.5.12.1.2 Rest of South & Central America: Breath Analyzer Market – Revenue and Forecast to 2030 (US\$ Million)

10.5.13 Rest of South & Central America: Breath Analyzer Market, by Technology, 2020–2030 (US\$ Million)

10.5.14 Rest of South & Central America: Breath Analyzer Market, by Application, 2020–2030 (US\$ Million)

10.5.15 Rest of South & Central America: Breath Analyzer Market, by End User, 2020–2030 (US\$ Million)

11. BREATH ANALYZER MARKET–INDUSTRY LANDSCAPE

11.1 Overview

11.2 Growth Strategies in Breath Analyzer Market

11.3 Organic Growth Strategies

11.3.1 Overview

11.4 Inorganic Growth Strategies

11.4.1 Overview

12. COMPANY PROFILES

12.1 Thermo Fisher Scientific Inc

- 12.1.1 Key Facts
- 12.1.2 Business Description
- 12.1.3 Products and Services
- 12.1.4 Financial Overview
- 12.1.5 SWOT Analysis
- 12.1.6 Key Developments

12.2 Alcolizer Pty Ltd

- 12.2.1 Key Facts
- 12.2.2 Business Description
- 12.2.3 Products and Services
- 12.2.4 Financial Overview
- 12.2.5 SWOT Analysis
- 12.2.6 Key Developments

12.3 Lifeloc Technologies Inc

- 12.3.1 Key Facts
- 12.3.2 Business Description
- 12.3.3 Products and Services
- 12.3.4 Financial Overview
- 12.3.5 SWOT Analysis
- 12.3.6 Key Developments

12.4 Now Group UK Ltd

- 12.4.1 Key Facts
- 12.4.2 Business Description
- 12.4.3 Products and Services
- 12.4.4 Financial Overview
- 12.4.5 SWOT Analysis
- 12.4.6 Key Developments

12.5 Dragerwerk AG & Co KGaA

- 12.5.1 Key Facts
- 12.5.2 Business Description
- 12.5.3 Products and Services
- 12.5.4 Financial Overview
- 12.5.5 SWOT Analysis
- 12.5.6 Key Developments

12.6 Abbott Laboratories

- 12.6.1 Key Facts
- 12.6.2 Business Description
- 12.6.3 Products and Services
- 12.6.4 Financial Overview
- 12.6.5 SWOT Analysis
- 12.6.6 Key Developments
- 12.7 Honeywell International Inc
 - 12.7.1 Key Facts
 - 12.7.2 Business Description
 - 12.7.3 Products and Services
 - 12.7.4 Financial Overview
 - 12.7.5 SWOT Analysis
 - 12.7.6 Key Developments
- 12.8 KHN Solutions LLC
 - 12.8.1 Key Facts
 - 12.8.2 Business Description
 - 12.8.3 Products and Services
 - 12.8.4 Financial Overview
 - 12.8.5 SWOT Analysis
 - 12.8.6 Key Developments
- 12.9 Bedfont Scientific Ltd
 - 12.9.1 Key Facts
 - 12.9.2 Business Description
 - 12.9.3 Products and Services
 - 12.9.4 Financial Overview
 - 12.9.5 SWOT Analysis
 - 12.9.6 Key Developments
- 12.10 Intoximeters Inc
 - 12.10.1 Key Facts
 - 12.10.2 Business Description
 - 12.10.3 Products and Services
 - 12.10.4 Financial Overview
 - 12.10.5 SWOT Analysis
 - 12.10.6 Key Developments

13. APPENDIX

- 13.1 About Us
- 13.2 Glossary of Terms

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