

Germany Respiratory Devices Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 110 pages | Mordor Intelligence

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Report description:

The German respiratory devices market is expected to register a CAGR of 5.5% over the forecast period.

Major respiratory devices, including ventilators, nebulizers, CPAP, BiPAP, and oxygen concentrators, were in high demand due to their widespread use in the case of COVID-19 patients. With the increased severity of COVID-19 in countries such as Germany, the use of breathing equipment has increased during the pandemic. The study published in the PLOS One Journal in January 2022 reported that during COVID-19, the use of non-invasive ventilation (NIV) increased substantially in Germany. The proportion of patients who only received NIV increased from 9% to 30%. As a result, the demand for respiratory equipment increased dramatically in Germany during the pandemic to treat COVID-19 patients, which had a favorable impact on the market's expansion. Furthermore, due to an increase in the prevalence of respiratory diseases and new product introductions, a similar trend is expected to continue over the forecast period.

The market is driven by the increase in the prevalence of respiratory disorders, such as COPD, TB, asthma, lung cancer, and sleep apnea, technological advancements, and a large patient population. For instance, a study published in the Journal of Asthma and Allergy in July 2022 reported that asthma is one of Germany's most common chronic diseases, affecting almost 4-5% of all adults and 10% of children each year. Thus, the high burden of asthma in the country is expected to increase the demand for respiratory devices, thereby driving the growth of the market studied over the forecast period.

Additionally, older people are more susceptible to respiratory disorders; therefore, an increase in this group is anticipated to fuel market expansion. Pneumonia, chronic obstructive pulmonary disease, asthma, lung cancer, and pulmonary embolism are examples of respiratory conditions associated with aging. According to the Germany Federal Statistical Office 2022 report, Germany has a population of approximately 83.2 million people. Of that, 16.2 million people are above the age of 67, which is

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anticipated to reach 21.4 million by 2040. Respiratory diseases are highly associated with the aging population; hence, an increase in the geriatric population is expected to drive the demand for respiratory devices in the country, thereby boosting market growth over the forecast period.

Furthermore, increasing R&D expenditure by innovators and generic players, technological advancements associated with respiratory devices, and the rising aging population are expected to boost the German respiratory devices market. For instance, in March 2022, researchers at FAU (Germany) and McGill University Quebec (Canada) received EUR 225,000 (approximately USD 236,628) in funding from the Free State of Bavaria. The funding will be used to design a wearable device for monitoring the breathing of patients with chronic diseases such as asthma or bronchitis. The wearable device can automatically monitor respiratory function and reliably recognize symptom changes. Such technological advances and growing research and development activity are expected to boost market growth over the forecast period.

However, high costs associated with the devices may hamper the market growth to a certain extent.

Germany Respiratory Devices Market Trends

Ventilators in Germany Respiratory Device is Estimated to Witness Healthy Growth in Future.

Ventilators are estimated to witness healthy growth in the future, attributed to the growing prevalence of respiratory disorders and the growing geriatric population. Ventilation equipment has been in high demand as a result of the COVID-19 outbreak. A ventilator is a type of medical equipment that provides mechanical ventilation by moving breathable air into and out of the lungs to provide breaths to patients who are physically unable to breathe or insufficiently breathing.

An increase in product launches by the market players is expected to boost the segment's growth over the forecast period. In October 2021, the launch of Luisa was announced; it is the third-generation ventilator developed and manufactured by Lowenstein Medical in Germany and marketed in Europe since 2020. It can be prescribed to patients diagnosed with chronic respiratory failure due to chronic obstructive pulmonary disease (COPD) and interstitial lung disease (ILD).

Additionally, various initiatives taken by the market players are expected to boost the market growth in the country. For instance, in March 2022, German authorities prevented the Chinese Aeonmed Group from acquiring German medical equipment producer Heyer Medical AG. Such initiatives by the market players are expected to boost the segment's growth over the forecast period. In September 2021, Germany donated five ventilators worth UGX 407.5 million (EUR 98,150) to Mulago National Referral Hospital and Mbarara Regional Referral Hospital. Thus, all aforementioned factors are expected to boost the segment's growth over the forecast period.

Inhalers Segment is Expected to Witness Healthy Growth Over the Forecast Period

An inhaler is a device used to deliver medication to the lungs and airways. It is mainly used to treat or prevent respiratory diseases such as asthma, chronic obstructive pulmonary disease (COPD), or cystic fibrosis. Inhalers are medications inhaled through the mouth and into the lungs, which help relax the muscles that tighten around the airways. Inhalers help open up the airways, allowing more air to move in and out of the lungs and helping the patient breathe more easily.

The increasing cases of respiratory diseases, such as hay fever, chronic obstructive pulmonary disease (COPD), and asthma, are the major factor propelling the segment's growth. In Germany, the most prevalent respiratory allergy in the country is hay fever, which is caused due to the cedar pollen spread throughout the country. According to the study published in the Journal of Asthma Allergy in July 2022, asthma is one of Germany's most common chronic diseases, affecting 4-5% of all adults and 10% of children each year. Thus, the significant burden of respiratory diseases in the country drives the demand for respiratory devices such as

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inhalers, thereby boosting the growth of the segment.

The study published in the International Journal of Chronic Obstructive Pulmonary Disease in July 2022 reported that single-inhaler triple therapy (efSITT), which includes inhaled corticosteroid (ICS) beclomethasone, long-acting 2-agonist (LABA) formoterol, and long-acting muscarinic antagonist (LAMA) glycopyrronium, were effective against respiratory diseases and improved COPD-specific symptoms and lung function parameters in COPD patients. The advantages and effectiveness of inhalers for COPD diseases are expected to propel the growth of the segment.

Germany Respiratory Devices Market Competitor Analysis

The German respiratory devices market is moderately competitive and consists of several major players. Some of the companies currently dominating the market are Geratherm Respiratory GmbH, DeVilbiss Healthcare GmbH, Dragerwerk AG, Fisher & Paykel Healthcare Limited, GENERAL ELECTRIC COMPANY, GlaxoSmithKline PLC, Invacare Corporation, Chart Industries, Koninklijke Philips NV, and Medtronic.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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