

Positive Airway Pressure Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The positive airway pressure (PAP) market studied was anticipated to witness a CAGR of nearly 4.6% during the forecast period.

The COVID-19 pandemic turned the spotlight on continuous positive airway pressure. Since sleep apnea patients have an increasing demand for positive airway pressure (PAP), adherence to PAP significantly increased during the COVID-19 lockdown. According to the article published in the European Respiratory Journal 2020, a 4.48% increase in PAP adherence was observed during the first month of lockdown (15 March 2020 to 15 April 2020) compared to the same time in 2019.

The major factors attributing to the growth of the market are a rise in the global prevalence of sleep disorders such as sleep apnea due to the rise in the sedentary lifestyle, physical inactivity, and poor dietary habits resulting in increased obesity population, which was identified as the most common causative factor of sleep disorders. For instance, according to the World Health Organization report 2021, in 2020, more than 2 billion adults, 18 years and older, were overweight. Of these, over 650 million were obese, leading to a rise in sleep apnea.

The increasing global prevalence of sleep apnea is expected to boost the market over the forecast period. According to the article published in Lancet Respiratory Medicine 2020 by Adam V. Benjafield, globally, 936 million adults aged 30-69 had mild to severe obstructive sleep apnoea (OSA), and 425 million adults aged 30-69 had moderate to severe OSA. Similarly, it is believed that 50-60% of the obese population and patients with metabolic syndrome (MS) suffer from OSA. Thus, the growing prevalence of sleep apnea is expected to drive positive airway pressure market growth.

Also, increased awareness of sleep apnea and risk factors such as cardiovascular indications and high blood pressure are expected to fuel the PAP market throughout the forecast period.

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Positive Airway Pressure Market Trends

Continuous Positive Airway Pressure Devices Expected to Hold the Largest Market Share in the Positive Airway Pressure Market

Continuous positive airway pressure (CPAP) is a type of positive airway pressure ventilation in which a steady pressure larger than atmospheric pressure is continuously applied to a person's upper respiratory tract. Continuous positive airway pressure (CPAP) devices contribute to the largest share in the market because they are used as a first-line PAP therapy to treat various sleep disorders.

According to the article published in The Lancet Respiratory Medicine 2020, "Time to wake the giant of obstructive sleep apnoea", around 8 million people aged 30-69 years are affected by obstructive sleep apnoea (OSA) in the United Kingdom alone each year. The massive demand for the CPAP devices is due to their proven efficiency in many sleep apnea patients in multiple cases, such as airway blockages, by controlling the air pressure with the help of a pump in the device to open up the blocked airways.

Many developments are taking place, including product launches and approvals, partnerships, collaborations, and mergers and acquisitions that can boost the positive airway pressure market. In March 2019, Resmed, a medical equipment firm based in the United States, announced the acquisition of HB Healthcare (HBH) for an undisclosed sum. With this agreement, Resmed hopes to reach out to Korean people with the support of HB Healthcare and its network of trusted distributor partners to provide CPAP and respiratory care to millions of South Koreans suffering from sleep apnea, COPD, and other respiratory disorders.

The patients' increased preference for CPAP devices due to various advantages such as increased energy levels, improved mood, mental alertness, and quality of sleep increase their demand, contributing to the rise in adoption of these systems and fueling the market growth.

North America Dominates the Market and Expected to do Same in the Forecast Period

North America is expected to dominate the global PAP market throughout the forecast period. The dominance is due to factors such as the rising prevalence of diabetes, high blood pressure, obesity, obstructive sleep apnea (OSA), and pulmonary disorders, such as dyspnea in the United States, which is to higher demand for the PAP devices. For instance, according to reports published by the National Institute of Medicine in 2020, in the United States, OSA prevalence was estimated to be as high as 14% of men and 5% of women. Hispanic, black, and Asian populations have higher rates, which drives the market growth in the forecast period.

According to the Centers for Disease Control and Prevention's Behavioral Risk Factors Surveillance System (BFRSS) 2019, the adult obesity percentage in the United States was 42.4%. This was the first time the national average surpassed 40%. The growing prevalence of obesity increases the demand for sleep apnea, thereby driving the market for positive airway pressure market.

Also, increased affordability with a rise in disposable income, an aging population, a surge in high levels of air pollution, and technological advancements in the region contribute to its outstanding share in the global market revenue during the forecast period.

Positive Airway Pressure Market Competitor Analysis

The continuous positive airway pressure therapy market is moderately competitive and consists of several major players. In terms of market revenue, a few prominent players currently dominating the market are vigorously making acquisitions while others are

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launching new products. For example, in March 2019, ResMed consolidated its leading role in Korea's CPAP and respiratory care market by acquiring HB Healthcare (HBH) to help millions of South Koreans living with sleep apnea, chronic obstructive pulmonary disease (COPD), and other respiratory conditions. Some companies currently dominating the market include Koninklijke Philips NV, ResMed Inc., Smiths Group PLC, 3B Medical Inc., and Apex Medical Corp.

Additional Benefits:

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

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