

## **Australia Respiratory Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 70 pages | Mordor Intelligence

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### **Report description:**

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

#### Key Highlights

-The COVID-19 pandemic had an exponential impact on the respiratory devices market during the pandemic. The demand for ventilators, oxygen concentrators, and other respiratory devices was significantly higher in the country during the pandemic. For instance, as per the data published by the Australian Institute of Health and Welfare, in July 2022, the government spent USD 7.7 billion (4 billion by the Australian Government and USD 3.7 billion by state and territory governments) through the National Partnership on COVID-19 Response (NPCR). Additionally, as per the same source, the government invested USD 13.6 million to provide access to pulse oximeters and extended distribution arrangements for PPE from the NMS to general practice and other healthcare settings to support the safe management of COVID-19-positive people. Hence, owing to the above-mentioned factors, COVID-19 had a significant impact on the studied market. However, with the COVID-19 cases in control, the market seized slightly in the current scenario as compared to the pandemic in terms of demand for respiratory devices. Furthermore, due to the increasing prevalence of respiratory disorders and technological advancements in devices, the market is expected to witness significant growth over the forecast period.

-The high prevalence of respiratory diseases such as chronic obstructive pulmonary disease (COPD), asthma, and pneumonia in the country is expected to propel the market growth during the forecast period. For instance, according to the Australian Bureau of Statistics, March 2022 update, 375.8 thousand individuals (1.5%) of all ages had COPD in 2021. The same source stated that roughly 2.7 million (10.7%) Australians were suffering from asthma in 2021. Moreover, the prevalence of asthma was higher in females (12%) as compared to males (9.4%). Therefore, the high burden of COPD and asthma in the country is projected to boost the demand for respiratory devices such as oximeters, inhalers, nebulizers, and oxygen concentrators for the management of such diseases, which is further expected to augment the market growth.

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-In addition, the rising government funding to develop and accelerate the production of essential respiratory devices in the country is also contributing to market growth. For instance, in March 2022, the Australian government invested USD 248.1 million to extend the operational timeframe for the general practice-led respiratory clinics (GPRC) Program and network of up to 150 GPRCs across Australia until 30 September 2022. Thus, such investments and government initiatives are anticipated to accelerate the demand for advanced respiratory devices in the newly established respiratory clinics, hence propelling market growth.

-Furthermore, the technological advancements by market players in respiratory devices significantly contribute to the market growth. For instance, in May 2021, HeiQ Materials AG utilized anti-viral textile technology developed by Australian materials technology company Xefco Pty Ltd with support from Deakin's Institute for Frontier Materials (IFM) to produce medical-grade face masks. The masks will incorporate new patent-pending technology, called Metallix, invented by Xefco and further tested and refined with help from IFM researchers. Such research-driven developments are expected to boost the demand for respiratory disposables, thereby propelling the market growth.

-Therefore, owing to factors such as the high burden of respiratory diseases such as COPD and asthma and rising government investment for the expansions of respiratory clinics, ultimately boosting the demand for respiratory devices along with product launches, the studied market is anticipated to witness growth over the analysis period. However, the high cost of devices is expected to restrain the market growth.

## Australia Respiratory Devices Market Trends

### Ventilators Segment is Expected to Show Better Growth in the Forecast Years

- A ventilator is a machine that pumps oxygen-rich air into the lungs. The segment is expected to grow during the forecast period owing to the high burden of respiratory diseases such as lung cancer and asthma in the country. In addition, the donations of ventilators by the government and technological advancement and launches by market players are also projected to boost the segment's growth.

- According to the Cancer Council 2022 report, lung cancer is the fifth most commonly diagnosed cancer in Australia, and it is estimated that one in 20 people will be diagnosed by the time they are 85. It is also estimated that more than 14,500 people were diagnosed with lung cancer in 2022. In lung cancer, nebulization chemotherapy is suggested, and its management requires ventilation in most cases. Hence, the high burden of lung cancer in the country is expected to propel the demand for ventilators in the country, thereby propelling market growth.

- Additionally, the initiatives by the government to donate ventilators to countries in need indicate the high production and availability of such devices in the country. For instance, in June 2021, the Morrison Government stood with its partners in the Indo-Pacific as they faced significant health and humanitarian challenges from COVID-19 by delivering oxygen medical supplies to India, Nepal, and Sri Lanka. Australia also supplied 3000 ventilators and 250 oxygen concentrators to India, which was part of its USD 37.1 million packages of support for India. Such initiatives are expected to expedite the production of ventilators in the country during the forecast years.

- Furthermore, in January 2023, Getinge launched its new Servo-c mechanical ventilator, offering lung-protective therapeutic tools in Australia to treat both pediatric and adult patients. Servo-c is intended to make health care accessible and affordable for more hospitals around the world. The rising launches of technologically advanced ventilators are also contributing to the segment's growth during the forecast period.

### Spirometers Segment is Expected to Witness significant Growth Over the Forecast Period.

- Spirometers measure various lung function parameters, such as the volume of air a person can inhale and exhale and breathing

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rate. These measurements help in diagnosing and monitoring respiratory conditions such as asthma, chronic obstructive pulmonary disease (COPD), and other lung disorders. The segment is expected to grow due to the high burden of smoking and rising research and development activities by market players for the development of innovative spirometers in the country, contributing significantly to market growth.

- The high prevalence of smoking in Australia is also expected to increase the prevalence of various respiratory diseases, thus increasing the usage of spirometers for measuring lung function required for the diagnosis of diseases. For instance, according to data updated by the Australian Bureau of Statistics in December 2021, an estimated one in ten adults were daily smokers (10.7% or 2.1 million adults) in Australia in 2021, and men were more likely than women to smoke daily (12.6% compared to 8.8%). The source also stated that adults with fair or poor health were more likely to be current daily smokers (17.7%). Therefore, the high burden of smoking in the country is expected to boost the demand for spirometers to monitor respiratory conditions such as COPD and asthma.

- Additionally, in March 2021, Vyair Medical launched the AioCare (HealthUp SA, Poland) mobile spirometry system in more than 15 countries, including Australia and other countries. This new technology allows physicians to promptly diagnose pulmonary diseases, including asthma and COPD, as accurately as hospital-grade spirometers and performs high-quality patient monitoring via advanced digital connectivity at home. The rising launches of technologically advanced spirometers are expected to boost its demand during the forecast period.

- Therefore, owing to the high burden of smoking and rising launches of technologically advanced spirometers, the segment is expected to witness significant growth during the forecast period.

## Australia Respiratory Devices Industry Overview

Australia's respiratory devices market is moderately competitive in nature due to the presence of many market players. The companies implement certain strategic initiatives such as a merger, new product launches, acquisitions, and partnerships that help them strengthen their market position. The majority of respiratory devices are being manufactured by the global key players. Some market players are Chart Industries Inc., Drive Medical (DeVilbiss Healthcare LLC), Drägerwerk AG & Co. KGaA, Fisher & Paykel Healthcare Ltd, GE Healthcare Inc., GSK plc, Invacare Corporation, Koninklijke Philips NV, Medtronic PLC, ResMed Inc, Getinge AB, and Asahi Kasei Corporation (ZOLL Medical Corporation).

### Additional Benefits:

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

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