

## **Capnography Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029**

Market Report | 2024-02-17 | 114 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The Capnography Devices Market size is estimated at USD 584.47 million in 2024, and is expected to reach USD 829.37 million by 2029, growing at a CAGR of 7.25% during the forecast period (2024-2029).

#### Key Highlights

- COVID-19 disease significantly impacted capnography devices. During the early pandemic in 2020, there had been a slight decline in market growth due to the lack of availability of the devices. This had been primarily due to the supply chain restrictions and manufacturing halts because of stringent lockdowns across the globe. But, during the late pandemic, there had been a huge surge in market growth due to the rising adoption of capnography devices in the management and detection of COVID-19 disease.
- Furthermore, according to the study published in Respiratory Physiology and Neurobiology in December 2020, capnography is a convenient bedside approach for monitoring patients' split ventilation. Such advantages of capnography during the pandemic have led to increased adoption of capnography devices during the late pandemic phase. Furthermore, post-pandemic, the market is expected to show a significant pace due to the adoption of capnography devices for various lung diseases such as respiratory infections, asthma, and chronic obstructive lung pulmonary disease.
- The major factors driving the market growth include the rising number of surgeries across the globe, the increasing prevalence of respiratory diseases, and technological advancements in capnography devices, among others.
- Respiratory diseases, such as respiratory infections, asthma, lung cancer, and Chronic obstructive pulmonary disease (COPD), are increasing at an alarming rate in both developed and developing countries, which is driving the growth of the market. Chronic respiratory diseases are found to affect the airways and other parts of the lungs for a longer duration of the period. Respiratory symptoms are among the major causes of consultation with doctors and physicians in primary health care centers. According to the Global Initiative for Chronic Obstructive Lung Disease 2022, COPD is thought to affect 200 million people, and asthma affects 262 million people globally.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

-In addition, according to the ERS International Congress 2021, it is estimated that the number of COPD patients in European regions such as Germany, the United Kingdom, Spain, and Italy would be 7.6 million, 7 million, 4.8 million, and 4.7 million, respectively, by 2050. Such a huge prevalence of respiratory devices is anticipated to drive market growth due to the rising adoption of capnography devices during the management of COPD

-Furthermore, the rising demand for capnography devices and key initiatives adopted by the market players is anticipated to rise in adoption, driving market growth. For instance, in November 2021, Smile Train and Lifebox started developing capnography equipment specifically for low-resource settings in an effort to increase the safety of anesthesia for kids worldwide. The goal of this endeavor is to locate and acquire a reliable, user-friendly, and reasonably priced capnography device that will aid in enhancing anesthetic safety for kids all over the world.

-Thus, the increasing prevalence of respiratory diseases, technological advancement in the products, and rising initiatives from the market players have augmented the demand for capnography devices, which is expected to drive the growth of the market. However, the shortage of skilled professionals and the high cost of devices are the factors expected to hinder market growth.

## Capnography Devices Market Trends

### Side Stream in Technology Segment is Expected to Hold a Significant Share Market Share over the Forecast Period

- The side stream technology is expected to hold a significant market share over the forecast period owing to its wide usage in anesthesia monitoring.

- The major factor driving the growth of the market includes an increase in surgical procedures across the globe. The side stream capnography devices are easy to connect, and they can be used in collaboration with simultaneous oxygen administration via a nasal prong. The number of surgeries in developed nations of Europe is anticipated to drive the segment's growth due to the increased adoption of side-stream technology.

- According to the Organization for Economic Co-operation and Development (OECD), in January 2023, the number of surgeries performed in European countries such as Denmark, Ireland, and Portugal in 2021 were 49,308, 32,844, and 94,872, respectively. Such a huge number of surgeries in developed countries will drive market growth due to the increased adoption of side-stream capnography devices to monitor the concentration of carbon dioxide in exhaled breath, driving the segment growth.

- Furthermore, the importance of side-stream capnography in infant ventilation is also expected to bolster market growth. For instance, according to the study published in the Journal of Perinatology in March 2021, the introduction of side-stream capnography reduces the magnitude of difference in CO<sub>2</sub> levels in mechanically ventilated newborns in the first week after birth, and the number of blood samples would be reduced. Furthermore, according to the same source, side-stream capnography was associated with a reduction in severe intraventricular hemorrhage. Such studies show the importance of side stream capnography devices driving segment growth.

- The rise in surgical procedures and the importance of side-stream capnography during surgeries is expected to increase the demand for side-stream capnography devices, leading to significant growth in the market.

### North America is Expected to Hold a Healthy Market Share over the Forecast Period

- North America holds a significant market share and is expected to do the same over the forecast period. In North America, the United States is expected to have the largest capnography devices share owing to the rising technological advancements and an increase in the prevalence of respiratory diseases.

- The rising prevalence of respiratory diseases such as asthma is also expected to drive market growth in the region. For instance, according to the Centers for Disease Control and Prevention (CDC), in October 2022, the percentage of adults aged 18 and over

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

who currently have asthma in the United States in 2021 was 8.0%, and the annual number of office visits for asthma was 5.8 million in 2021. Such a huge incidence of asthma is expected to drive the adoption of capnography devices in the management of asthma, driving the market growth.

- According to the study published in the European Journal of Pediatrics in September 2021, the Masimo EMMA Portable Capnograph was found to be an effective monitoring device for mechanically ventilated preterm infants. For patients of all ages, EMMA offers smooth mainstream capnography in a small, portable instrument. Such technologically advanced products from the companies of the United States will lead to increased adoption of the device in the region, driving market growth.

- The rising approvals of capnography devices from international regulatory agencies are expected to drive market growth in the region. For instance, in April 2021, the United States Food and Drug Administration (US FDA) approved Radius PCG, a portable real-time capnograph with wireless Bluetooth connectivity developed by Masimo. The approval of innovative devices is anticipated to increase the adoption of capnography devices, driving market growth in the region.

- Thus, owing to the rising initiatives from the market players and rising technological advancement, the market is expected to witness high growth over the forecast period.

## Capnography Devices Industry Overview

The capnography devices market is consolidated due to the presence of established players. The factors owing to the competition include rising approvals of capnography devices and rising initiatives from the market players, such as partnerships and acquisitions, among others. Some of the market players are Becton, Dickinson and Company, DiMedica, Dragerwerk AG & Co. KGaA, Koninklijke Philips N.V., Masimo Corporation, Medtronic Plc, Nihon Kohden Corporation, Nonin Medical, Smiths Medical, and Welch Allyn.

### Additional Benefits:

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

### Table of Contents:

#### 1 INTRODUCTION

##### 1.1 Study Assumptions and Market Definition

##### 1.2 Scope of the Study

#### 2 RESEARCH METHODOLOGY

#### 3 EXECUTIVE SUMMARY

#### 4 MARKET DYNAMICS

##### 4.1 Market Overview

##### 4.2 Market Drivers

###### 4.2.1 Rising Number of Surgeries across the Globe

###### 4.2.2 Increase in the Prevalence of Respiratory Diseases

###### 4.2.3 Technological Advancements in Capnography Devices

##### 4.3 Market Restraints

###### 4.3.1 Shortage of Skilled Professionals

###### 4.3.2 High Cost of the Devices

##### 4.4 Porter's Five Forces Analysis

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.4.1 Threat of New Entrants
- 4.4.2 Bargaining Power of Buyers/Consumers
- 4.4.3 Bargaining Power of Suppliers
- 4.4.4 Threat of Substitute Products
- 4.4.5 Intensity of Competitive Rivalry

## 5 MARKET SEGMENTATION

- 5.1 By Product
  - 5.1.1 Hand-held
  - 5.1.2 Stand-alone
- 5.2 By Technology
  - 5.2.1 Side Stream
  - 5.2.2 Main Stream
  - 5.2.3 Micro Stream
- 5.3 By Application
  - 5.3.1 Critical Care
  - 5.3.2 Sleep studies
  - 5.3.3 Pain Management
  - 5.3.4 Procedural Sedation
  - 5.3.5 Other Applications
- 5.4 By End-User
  - 5.4.1 Hospitals
  - 5.4.2 Ambulatory Surgical Centers
  - 5.4.3 Other End-Users
- 5.5 Geography
  - 5.5.1 North America
    - 5.5.1.1 United States
    - 5.5.1.2 Canada
    - 5.5.1.3 Mexico
  - 5.5.2 Europe
    - 5.5.2.1 Germany
    - 5.5.2.2 United Kingdom
    - 5.5.2.3 France
    - 5.5.2.4 Italy
    - 5.5.2.5 Spain
    - 5.5.2.6 Rest of Europe
  - 5.5.3 Asia-Pacific
    - 5.5.3.1 China
    - 5.5.3.2 Japan
    - 5.5.3.3 India
    - 5.5.3.4 Australia
    - 5.5.3.5 South Korea
    - 5.5.3.6 Rest of Asia-Pacific
  - 5.5.4 Middle East and Africa
    - 5.5.4.1 GCC
    - 5.5.4.2 South Africa
    - 5.5.4.3 Rest of Middle East and Africa

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.5.5 South America
  - 5.5.5.1 Brazil
  - 5.5.5.2 Argentina
  - 5.5.5.3 Rest of South America

## 6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
  - 6.1.1 Becton, Dickinson and Company
  - 6.1.2 DiMedica
  - 6.1.3 Dragerwerk AG & Co. KGaA
  - 6.1.4 Koninklijke Philips N.V.
  - 6.1.5 Masimo Corporation
  - 6.1.6 Medtronic Plc
  - 6.1.7 Nihon Kohden Corporation
  - 6.1.8 Nonin Medical
  - 6.1.9 Smiths Medical
  - 6.1.10 Welch Allyn
  - 6.1.11 SunMed
  - 6.1.12 Infinium Medical, Inc.

## 7 MARKET OPPORTUNITIES AND FUTURE TRENDS

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Capnography Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029**

Market Report | 2024-02-17 | 114 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-28"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)