

Respiratory and Anesthesia Disposables - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 110 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 respiratory and anesthesia disposables market studied is expected to register a CAGR of 5.3% over the forecast period.

Key Highlights

-COVID-19 impacted market growth. For instance, as per the data from the journal Patient Safety in Surgery published in June 2022, the overall number of surgical patients had fallen by 11.7% and 22.7%, respectively, for primary and secondary procedures in Germany. In addition, approximately 376,000 digestive operations and 24% of the cancer surgery cases were canceled in Germany during the pandemic. Thus, this impacted the demand for anesthesia disposables during the pandemic. However, the increased number of COVID-19 cases among the population increased the demand for respiratory masks during the pandemic.

-For instance, in September 2022, the South Korean government reintroduced surgical masks to curb the spread of coronavirus infection among the population. Moreover, the released restrictions have increased patient visits and hospital admissions, increasing the demand for respiratory and anesthesia disposables. Thus, the market is expected to grow over the forecast period.

-Factors such as the increasing prevalence of respiratory disorders, a growing number of surgeries, and the high prevalence of tobacco smoking are expected to boost market growth over the forecast period.

-The prevalence of respiratory disorders, such as COPD, tuberculosis, asthma, and sleep apnea, is increasing globally due to various reasons, such as air pollution, occupational chemicals and dust, frequent lower respiratory infections during childhood, and other environmental factors. This is expected to increase the demand for respiratory disposables products, hence propelling the market growth over the forecast period. For instance, according to the data published by the Center of Disease Control and Prevention (CDC), in December 2022, about 4.6% of individuals had received a chronic obstructive pulmonary disease (COPD), emphysema, or chronic bronchitis diagnosis at some point in 2021. Also, according to World Health Organization (WHO), in October 2022, an estimated 10.6 million people were diagnosed with tuberculosis (TB) in 2021, with an increase of 4.5% as compared to the pandemic period worldwide. Thus, the high burden of respiratory diseases is expected to increase the demand

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

for filtering facepiece respirators (FFR), masks, and other disposable products to prevent the inhalation and spread of infection, hence boosting market growth.

-Additionally, the growing number of surgeries that requires anesthesia raises the demand for various anesthesia disposables products such as oxygen mask, suction catheters, tubes, and others. This, in turn, is expected to boost the market growth over the forecast period. For instance, an article published in the Journal of Orthopaedic Science in September 2021, about 4,052 knee arthroplasties are expected to be performed on men between the ages of 40 and 64 years, 6942 on men between the ages of 65 and 74 years, 14,986 on men over 75 years in Japan by 2030. In addition, as per the same source, about 7,092 knee arthroplasties are expected to be performed on women between the ages of 40 and 64 years, 22,957 on women between the ages of 65 and 74 years, and 58,340 on women over 75 years in Japan by 2030.

-Moreover, the rising new product launches are expected to increase the availability of products in the market, thereby contributing to market growth. For instance, in March 2021, Nonin Medical, Inc. launched two new disposable products, a single-use wristband and a sensor for use with Nonin's WristOx2 3150 wrist-worn pulse oximeter (SpO2). The company's new disposables offer immediate and cost-effective solutions to reduce healthcare provider and patient exposure to infectious agents. Also, in February 2021, Filti launched its new NF95 Respirator in America. The pre-certified NF95 Respirators are constructed using the company's state-of-the-art nanofiber technology and are proven to filter 95% of aerosolized, airborne particles like COVID-19 moving through the material.

-Therefore, owing to the aforementioned factors, such as the high burden of respiratory disorders and increasing surgical procedures, the studied market is expected to grow over the forecast period. However, the high cost of consumables is likely to impede the growth of the respiratory and anesthesia disposables market over the forecast period.

Respiratory and Anesthesia Disposables Market Trends

Chronic Obstructive Pulmonary Disease Segment is Expected to Witness Significant Growth Over the Forecast Period

- The chronic obstructive pulmonary diseases (COPD) segment is anticipated to witness significant growth in the market over the forecast period owing to factors such as the increasing cases of chronic obstructive pulmonary diseases among the population, rising technological advancements in consumables, and new product launches.

- According to an article published in the European Respiratory Journal, in November 2021, about 36 million Europeans were suffering from chronic obstructive pulmonary disease (COPD) during the pandemic, and this number is projected to reach 49 million by 2050, which represents a 35.2% relative increase in patients and 39.6% increase in prevalence. Additionally, according to an article published in the Annals of Intensive Care in March 2021, it has been observed that the newest ECCO2R devices for COPD patients are relatively easy to use as they work with very low blood flow rates and just require the insertion of a tiny double-lumen cannula.

- Additionally, according to an article published in ERS Journal in August 2022, it has been projected that about 645.6 million people (454.4 million men and 191.2 million women) are expected to have COPD by 2050, representing a 36% relative increase in global prevalence as compared to the previous year. Thus, the expected increase in the number of patients suffering from COPD, a serious public health issue, is expected to increase the demand for effective respiratory disposables such as oxygen masks, nebulizers, and others, hence propelling the segment's growth.

- Furthermore, the growing technological advancements in consumables, as well as new product launches, are anticipated to augment the segment's growth over the forecast period. For instance, in June 2021, Penlon launched a new and improved range of laryngoscope blades and handles designed for use in the magnetic resonance (MR) environment. The Penlon MRI Green System Laryngoscope Range provides clinicians with the ability to safely intubate patients in a static magnetic field up to 1000 gauss/cm.

- Thus, owing to the abovementioned factors, such as the high burden of chronic obstructive pulmonary diseases among the population and increasing technological advancements, the studied segment is expected to show considerable growth over the forecast period.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

North America is Expected to Have the Significant Market Share Over the Forecast Period

- North America is expected to hold a significant share in the respiratory and anesthesia disposables market over the forecast period owing to factors such as the high burden of respiratory diseases, an increasing number of surgical procedures owing to chronic diseases and road accidents, and the high prevalence of tobacco smoking.
- According to the data published by the Centers for Disease Control and Prevention (CDC), in August 2022, about 4.6% of adults aged 18 and over had COPD, emphysema, or chronic bronchitis in 2021 in the United States. As per the same source, 3.3% of adults aged 18 and above had asthma attacks/episodes in 2021. Additionally, as per the statistics published by the World Health Organization (WHO), as of 13 February 2023, about 57,852 confirmed cases of coronavirus were reported in America. Thus, the high number of COVID-19 and COPD cases among the population is leading to respiratory diseases, which in turn is expected to increase the demand for respiratory devices such as masks, breathing bags, and others. This is anticipated to augment the market growth over the forecast period.
- Furthermore, as per 2022 statistics published by the Government of Canada, about 3.8 million population aged 12 years and over were current, daily, or occasional smokers in Canada in 2021. Also, as per 2022 statistics published by WHO, West Virginia has the highest smoking rate at 23.8%, followed by Kentucky at 23.6%, Louisiana at 21.9%, and Ohio at 20.8%, 2022. Thus, the high number of smokers in the region are at high risk of developing various lung diseases such as COPD, which in turn raises the demand for respiratory disposables market over the forecast period.
- Furthermore, the growing number of new product launches and approvals increases the availability of disposable products in the market, thereby contributing to market growth in the region. For instance, in May 2022, Honeywell launched two new NIOSH-certified respiratory products, the DC365 small surgical N95 respirator and RU8500X series, to help protect frontline workers who need a smaller-sized surgical N95.
- Also, in April 2022, Omnivision launched new laryngoscope reference designs that include a range of Omnivision products that help improve patient care by providing crisp, clear images for single-use video laryngoscopes. The design provides high-quality images and a wider field of view (FoV) and includes CameraCubeChip CMOS image sensors, low-power mechanical designs, optics, batteries, as well as capabilities for recording and playback.
- Therefore, owing to the aforementioned factors, such as the high burden of respiratory diseases and increasing new product launches, the studied market is expected to grow over the forecast period.

Respiratory and Anesthesia Disposables Industry Overview

The respiratory and anesthesia disposables market is a highly fragmented market with the presence of several players across the globe. The companies are adopting various key strategies such as collaboration, product launches, and others to retain their position in the market. Some of the players in the market are Medtronic plc, Koninklijke Philips N.V., Boston Scientific Corporation, Becton, Dickinson and Company (BD), Teleflex Incorporated, Armstrong Medical Industries, Inc., and Allied Healthcare Products, Inc., among others.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

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 Increasing Prevalence of Respiratory Disorders

4.2.2 Increasing Number of Surgeries

4.2.3 High Prevalence of Tobacco Smoking

4.3 Market Restraints

4.3.1 Higher Cost of Consumables

4.4 Porter's Five Forces Analysis

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 (Market Size by Value - USD)

5.1 Type

5.1.1 Laryngoscope

5.1.2 Tubes

5.1.3 Masks

5.1.4 Breathing Circuits

5.1.5 Resuscitators

5.1.6 Breathing Bags

5.1.7 Filters

5.1.8 Other Types

5.2 Application

5.2.1 Chronic Obstructive Pulmonary Disease (COPD)

5.2.2 Surgical Procedures

5.2.3 Asthma

5.2.4 Sleep Apnea

5.2.5 Emergency Use

5.3 End-User

5.3.1 Hospitals

5.3.2 Clinics

5.3.3 Trauma Centers

5.4 Geography

5.4.1 North America

5.4.1.1 United States

5.4.1.2 Canada

5.4.1.3 Mexico

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 5.4.2 Europe
 - 5.4.2.1 Germany
 - 5.4.2.2 United Kingdom
 - 5.4.2.3 France
 - 5.4.2.4 Italy
 - 5.4.2.5 Spain
 - 5.4.2.6 Rest of Europe
- 5.4.3 Asia-Pacific
 - 5.4.3.1 China
 - 5.4.3.2 Japan
 - 5.4.3.3 India
 - 5.4.3.4 Australia
 - 5.4.3.5 South Korea
 - 5.4.3.6 Rest of Asia-Pacific
- 5.4.4 Middle East and Africa
 - 5.4.4.1 GCC
 - 5.4.4.2 South Africa
 - 5.4.4.3 Rest of Middle East and Africa
- 5.4.5 South America
 - 5.4.5.1 Brazil
 - 5.4.5.2 Argentina
 - 5.4.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 Airways Corporation
 - 6.1.2 Armstrong Medical Industries, Inc.
 - 6.1.3 Becton, Dickinson and Company
 - 6.1.4 Boston Scientific Corporation
 - 6.1.5 Koninklijke Philips N.V.
 - 6.1.6 Medtronic PLC
 - 6.1.7 ResMed
 - 6.1.8 Smiths Group plc.
 - 6.1.9 SunMed
 - 6.1.10 Teleflex Incorporated

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Respiratory and Anesthesia Disposables - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 110 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*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-03
		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
www.scotts-international.com