

## **Mechanical Ventilators - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Mechanical Ventilators Market size is estimated at USD 5.33 billion in 2025, and is expected to reach USD 6.79 billion by 2030, at a CAGR of 4.95% during the forecast period (2025-2030).

The rising prevalence of chronic obstructive pulmonary disease (COPD) and other respiratory ailments, combined with a growing elderly population and an expansion of hospitals and healthcare facilities worldwide, is driving the market.

As the burden of COPD and respiratory diseases escalates, the demand for mechanical ventilation is set to surge. Mechanical ventilation plays a pivotal role in aiding patients with compromised respiratory functions, ensuring they receive essential respiratory support and enhancing survival rates during critical moments. For instance, as per data from the Australian Institutes of Health and Welfare in July 2024 highlighted that in 2023, asthma accounted for 2.5% of the overall disease burden, making up 35% of the total burden for all respiratory conditions. Asthma was the leading cause of disease burden for children aged 1-9 years. In 2022, around 2.8 million Australians, or 11% of the population, were estimated to have asthma. Such a significant burden of respiratory diseases underscores the anticipated growth of the market.

Moreover, an August 2023 article in the ERS Journal forecasted that by 2050, COPD could affect around 645.6 million people globally (454.4 million men and 191.2 million women). This projected rise in COPD patients, a pressing public health concern, is poised to drive up the demand for mechanical ventilators, fueling the segment's expansion.

The global surge in healthcare centers and hospitals is set to amplify the market for mechanical ventilators. As new facilities emerge to address the rising healthcare demands, especially in light of the increasing prevalence of respiratory diseases, the market is likely to see significant growth. For instance, the American Hospital Association (AHA) reported that the U.S. had around

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6,129 hospitals in 2023, a slight increase from 6,120 in 2022. This count encompasses a diverse range of establishments, including community hospitals and federal institutions. New healthcare facilities, often equipped with cutting-edge technology, are driving the adoption of modern mechanical ventilators boasting advanced features. Furthermore, the growth of healthcare infrastructure, spanning outpatient facilities to specialty clinics, amplifies the demand for mechanical ventilators.

New product launches and collaborations among industry players are energizing the mechanical ventilator market. For instance, in February 2024, Getinge unveiled its state-of-the-art Servo-c mechanical ventilator in India. Designed for both pediatric and adult patients, the Servo-c is equipped with vital lung-protective therapeutic tools to cater to diverse respiratory needs. As companies roll out innovative ventilator models, they frequently integrate advanced features like superior monitoring, portability, and intuitive interfaces, appealing to healthcare providers aiming to elevate patient care. This trend is expected to further fuel market growth.

Given the high burden of respiratory diseases, the expansion of healthcare facilities, and the introduction of new products, the market is poised for growth in the coming years. However, challenges such as costly materials and processes involved in ventilator manufacturing, coupled with the high expenses of healthcare systems and the rising instances of ventilator-associated pneumonia, could hamper the market growth.

## Mechanical Ventilators Market Trends

### Intensive Care Ventilators Segment is Expected to Grow Significantly Over the Forecast Period

Intensive care ventilators provide essential support to patients unable to breathe independently or needing assistance for adequate ventilation. These ventilators cater to both neonates and adults, accommodating a range of conditions from critically unstable patients to those in stable postoperative recovery. Driven by technological advancements and a heightened focus from manufacturers, the intensive care ventilators segment is poised for significant growth in the coming years.

As hospitals expand their ICU units, the demand for ICU mechanical ventilators is set to rise, propelling market growth. For example, the American Hospital Association's 2023 annual survey highlighted that the U.S. had 6,120 acute care registered hospitals. Notably, 5,222 of these hospitals had at least 25 acute care beds and one ICU bed. Together, they boasted 112,369 ICU beds, making up 12.2% of the total, distributed across more than 5,000 ICUs. With these centers aiming to enhance patient outcomes and effectively manage respiratory conditions, the mechanical ventilator market stands on the brink of substantial growth.

Furthermore, as companies delve into ventilator manufacturing, opportunities for segment growth emerge. For instance, in July 2024, Air Liquide Medical Systems unveiled the Monnal TEO ventilator, designed in France for intensive and critical care. This launch, a product of collaboration with Angers University Hospital's ICU in France, was developed with direct insights from doctors and healthcare professionals, all with the goal of elevating care for patients with acute respiratory failure. Such new launches and collaborative efforts among industry players are pivotal in bolstering the market for these devices.

In conclusion, the convenience of portable ventilators makes them a staple in hospitals, ensuring swift and continuous patient care even before arrival at the facility. With a rising number of hospitals, the demand for these efficient and versatile products is set to grow, further propelling the market.

### North America is Expected to Hold a Significant Share of the Market Over the Forecast Period

North America is poised to capture a significant market share during the forecast period, driven by the rising prevalence of chronic obstructive pulmonary disease (COPD) and other respiratory disorders, a robust healthcare infrastructure, and the presence of key

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market players.

Factors such as an aging population, urbanization, and environmental pollution are driving the rising prevalence of respiratory diseases. This escalating challenge underscores the growing reliance on respiratory support devices, including mechanical ventilators. For instance, data from the Canadian Institutes of Health Information, published in February 2024, highlighted that during the 2022-2023 period, respiratory illnesses were among the top 10 reasons for hospitalizations. They accounted for 32% of all hospitalizations in Canadians aged 0 to 4. Specifically, hospitalizations for seasonal influenza in this demographic reached 2,444, consistent with figures from the 2019-2020 period.

Moreover, there were notable increases in hospitalizations for various respiratory conditions. For instance, stays for lower respiratory infections, including acute bronchitis, surged from 9,501 in 2020 to 19,909 in 2023. Likewise, pneumonia-related hospitalizations saw a near tripling, jumping from 3,447 to 9,871 in the same period. Given this backdrop, the rising COPD cases are amplifying the demand for mechanical ventilators, suggesting a bullish outlook for market growth.

In addition, companies are rolling out innovative ventilator systems, boasting features like advanced monitoring, portability, and intuitive interfaces. These enhancements are drawing the attention of healthcare providers keen on elevating patient care. For instance, in May 2023, Fisher & Paykel Healthcare Corporation Limited unveiled the Airvo 3 high-flow system. With its targeted oxygen delivery, built-in battery, user-friendly interface, and settings tailored for pediatric and neonatal patients, the Airvo 3's increased maximum flow rate distinguishes it in the marketplace. This strategic launch not only expanded the company's clientele but also cemented its competitive edge, further fueling market growth.

In conclusion, the dual challenges of a high burden of respiratory diseases and COPD, coupled with strategic product launches, are set to drive the market in North America during the forecast period.

#### Mechanical Ventilators Industry Overview

The mechanical ventilation market is semi-consolidated in nature. Some of the key players operating in the industry are Getinge AB, Medtronic PLC, Smiths Medical, Koninklijke Philips NV, and ResMed Inc.

Additional Benefits:

- <ul> <li> The market estimate (ME) sheet in Excel format </li>  
<li> 3 months of analyst support </li> </ul>

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