

**Cough Assist Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Automatic v/s Manual), By Choice of Delivery (Face Mask, Mouthpiece, Adapter), By End User (Hospitals & Clinics, Ambulatory Care Settings, Homecare, Others), By Region and Competition, 2020-2030F**

Market Report | 2025-05-30 | 188 pages | TechSci Research

**AVAILABLE LICENSES:**

- Single User License \$4500.00
- Multi-User License \$5500.00
- Custom Research License \$8000.00

**Report description:**

**Market Overview**

The Global Cough Assist Devices Market was valued at USD 2.98 billion in 2024 and is projected to reach USD 4.55 billion by 2030, expanding at a CAGR of 7.45% during the forecast period. The market is being driven by rising awareness around respiratory health and a growing prevalence of chronic respiratory illnesses such as ALS and muscular dystrophy. Cough assist devices, also known as mechanical insufflation-exsufflation systems, are used to assist patients who cannot cough effectively due to neuromuscular disorders or spinal cord injuries. These devices provide a non-invasive method for clearing airway secretions, reducing the risk of infections and hospitalizations. Increasing diagnosis of chronic conditions, an aging global population, and the shift toward home-based care are major factors contributing to market growth. Furthermore, advancements in device design-such as portability, ease of use, and smart connectivity features-are expanding access and adoption across both institutional and homecare settings. However, high equipment costs and limited access in lower-income regions continue to challenge market penetration. Nonetheless, ongoing investments in healthcare infrastructure, product innovation, and respiratory care awareness are expected to sustain market momentum, particularly in emerging economies.

**Key Market Drivers**

**Rising prevalence of chronic respiratory diseases**

The increasing incidence of chronic respiratory disorders is a key driver for the global cough assist devices market. Conditions such as COPD, asthma, bronchiectasis, and neuromuscular diseases-including ALS and muscular dystrophy-impair the ability to

**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)

clear airway secretions. For patients with weakened respiratory muscles, natural coughing becomes ineffective, making cough assist devices vital for secretion clearance and infection prevention. Factors such as air pollution, smoking, and occupational exposures are accelerating the burden of respiratory diseases, particularly in low- and middle-income countries. The rise in global life expectancy is also contributing to a larger elderly population at higher risk for respiratory complications. As healthcare providers prioritize early diagnosis and preventative care, there is a growing emphasis on integrating cough assist devices into long-term treatment plans. These devices are increasingly recommended to improve patient outcomes, reduce hospital visits, and support quality of life for those living with chronic respiratory conditions. This trend is especially significant in the homecare segment, where long-term respiratory support is essential.

#### Key Market Challenges

##### High cost of devices

The high cost associated with cough assist devices is a major constraint for market expansion. These devices entail significant upfront investment, in addition to recurring expenses related to accessories, servicing, and user training. For many patients-particularly in developing regions-the cost barrier prevents access to these crucial respiratory support tools. Reimbursement policies for such devices remain inconsistent across markets, further exacerbating out-of-pocket expenses for users. Limited funding and insurance coverage often discourage healthcare professionals from prescribing these devices, knowing that affordability may be an issue for patients. In homecare settings, this financial burden typically falls on families or caregivers, creating additional reluctance to invest in the technology. While innovations in design and features continue, they often raise production costs, which manufacturers then pass on to consumers. This pricing dynamic complicates efforts to scale adoption. Solutions such as expanded reimbursement, targeted subsidies, and the development of more affordable alternatives are needed to overcome this barrier and enhance access to life-improving respiratory devices.

#### Key Market Trends

##### Technological Advancements and AI Integration

The market is being reshaped by technological advancements and the integration of artificial intelligence (AI) into cough assist devices. Newer models feature compact, portable designs, improved pressure modulation, and user-friendly interfaces that make them more comfortable and efficient for daily use. AI-powered functionalities allow these devices to analyze cough patterns and respiratory metrics, aiding in the early diagnosis and monitoring of conditions like COPD and pneumonia. Real-time data collection and predictive analytics enable more precise, individualized treatment planning. Furthermore, smart connectivity features allow remote monitoring by healthcare professionals, enhancing continuity of care and minimizing hospital visits. These innovations are particularly beneficial in homecare environments, where constant clinical supervision is not feasible. Digital platforms also foster better communication among patients, caregivers, and medical teams, contributing to improved compliance and outcomes. As AI and smart features become more widespread, cough assist devices are expected to become increasingly personalized, adaptable, and aligned with the broader trend toward connected health ecosystems.

#### Key Market Players

- Koninklijke Philips N.V.
- Hillrom Holdings, Inc.
- Percussionaire Corp.
- Dima Italia Srl
- United Hayek Industries Inc
- McKesson Medical-Surgical Inc.
- Aetna Inc.
- International Biophysics Corporation
- PARI GmbH
- Air Liquide Medical Systems S.A.

#### Report Scope:

In this report, the Global Cough Assist Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- Cough Assist Devices Market, By Type:

**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)

- o Automatic
- o Manual
- Cough Assist Devices Market, By Choice of Deliver:

- o Face Mask
- o Mouthpiece
- o Adapter

- Cough Assist Devices Market, By End User:

- o Hospitals & Clinics
- o Ambulatory Care Settings
- o Homecare
- o Others

- Cough Assist Devices Market, By Region:

- o North America

- ☐ United States

- ☐ Canada

- ☐ Mexico

- o Europe

- ☐ France

- ☐ United Kingdom

- ☐ Italy

- ☐ Germany

- ☐ Spain

- o Asia-Pacific

- ☐ China

- ☐ India

- ☐ Japan

- ☐ Australia

- ☐ South Korea

- o South America

- ☐ Brazil

- ☐ Argentina

- ☐ Colombia

- o Middle East & Africa

- ☐ South Africa

- ☐ Saudi Arabia

- ☐ UAE

#### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Cough Assist Devices Market.

#### Available Customizations:

Global Cough Assist Devices Market report with the given Market data, TechSci Research, offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

- Detailed analysis and profiling of additional Market players (up to five).

### Table of Contents:

1. Product Overview

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

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

www.scotts-international.com

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations
2. Research Methodology
  - 2.1. Objective of the Study
  - 2.2. Baseline Methodology
  - 2.3. Key Industry Partners
  - 2.4. Major Association and Secondary Sources
  - 2.5. Forecasting Methodology
  - 2.6. Data Triangulation & Validation
  - 2.7. Assumptions and Limitations
3. Executive Summary
  - 3.1. Overview of the Market
  - 3.2. Overview of Key Market Segmentations
  - 3.3. Overview of Key Market Players
  - 3.4. Overview of Key Regions/Countries
  - 3.5. Overview of Market Drivers, Challenges, Trends
4. Voice of Customer
5. Global Cough Assist Devices Market Outlook
  - 5.1. Market Size & Forecast
    - 5.1.1. By Value
  - 5.2. Market Share & Forecast
    - 5.2.1. By Type (Automatic v/s Manual)
    - 5.2.2. By Choice of Delivery (Face Mask, Mouthpiece, Adapter)
    - 5.2.3. By End User (Hospitals & Clinics, Ambulatory Care Settings, Homecare, Others)
    - 5.2.4. By Region
    - 5.2.5. By Company (2024)
  - 5.3. Market Map
    - 5.3.1. By Type
    - 5.3.2. By Choice of Delivery
    - 5.3.3. By End User
    - 5.3.4. By Region
6. North America Cough Assist Devices Market Outlook
  - 6.1. Market Size & Forecast
    - 6.1.1. By Value
  - 6.2. Market Share & Forecast
    - 6.2.1. By Type
    - 6.2.2. By Choice of Delivery
    - 6.2.3. By End User
    - 6.2.4. By Country
  - 6.3. North America: Country Analysis
    - 6.3.1. United States Cough Assist Devices Market Outlook
      - 6.3.1.1. Market Size & Forecast
        - 6.3.1.1.1. By Value
      - 6.3.1.2. Market Share & Forecast

**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)

- 6.3.1.2.1. By Type
- 6.3.1.2.2. By Choice of Delivery
- 6.3.1.2.3. By End User
- 6.3.2. Canada Cough Assist Devices Market Outlook
  - 6.3.2.1. Market Size & Forecast
    - 6.3.2.1.1. By Value
  - 6.3.2.2. Market Share & Forecast
    - 6.3.2.2.1. By Type
    - 6.3.2.2.2. By Choice of Delivery
    - 6.3.2.2.3. By End User
- 6.3.3. Mexico Cough Assist Devices Market Outlook
  - 6.3.3.1. Market Size & Forecast
    - 6.3.3.1.1. By Value
  - 6.3.3.2. Market Share & Forecast
    - 6.3.3.2.1. By Type
    - 6.3.3.2.2. By Choice of Delivery
    - 6.3.3.2.3. By End User
- 7. Europe Cough Assist Devices Market Outlook
  - 7.1. Market Size & Forecast
    - 7.1.1. By Value
  - 7.2. Market Share & Forecast
    - 7.2.1. By Type
    - 7.2.2. By Choice of Delivery
    - 7.2.3. By End User
    - 7.2.4. By Country
  - 7.3. Europe: Country Analysis
    - 7.3.1. France Cough Assist Devices Market Outlook
      - 7.3.1.1. Market Size & Forecast
        - 7.3.1.1.1. By Value
      - 7.3.1.2. Market Share & Forecast
        - 7.3.1.2.1. By Type
        - 7.3.1.2.2. By Choice of Delivery
        - 7.3.1.2.3. By End User
    - 7.3.2. Germany Cough Assist Devices Market Outlook
      - 7.3.2.1. Market Size & Forecast
        - 7.3.2.1.1. By Value
      - 7.3.2.2. Market Share & Forecast
        - 7.3.2.2.1. By Type
        - 7.3.2.2.2. By Choice of Delivery
        - 7.3.2.2.3. By End User
    - 7.3.3. United Kingdom Cough Assist Devices Market Outlook
      - 7.3.3.1. Market Size & Forecast
        - 7.3.3.1.1. By Value
      - 7.3.3.2. Market Share & Forecast
        - 7.3.3.2.1. By Type
        - 7.3.3.2.2. By Choice of Delivery
        - 7.3.3.2.3. By End User

**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)

- 7.3.4. Italy Cough Assist Devices Market Outlook
  - 7.3.4.1. Market Size & Forecast
    - 7.3.4.1.1. By Value
  - 7.3.4.2. Market Share & Forecast
    - 7.3.4.2.1. By Type
    - 7.3.4.2.2. By Choice of Delivery
    - 7.3.4.2.3. By End User
- 7.3.5. Spain Cough Assist Devices Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Type
    - 7.3.5.2.2. By Choice of Delivery
    - 7.3.5.2.3. By End User
- 8. Asia-Pacific Cough Assist Devices Market Outlook
  - 8.1. Market Size & Forecast
    - 8.1.1. By Value
  - 8.2. Market Share & Forecast
    - 8.2.1. By Type
    - 8.2.2. By Choice of Delivery
    - 8.2.3. By End User
    - 8.2.4. By Country
  - 8.3. Asia-Pacific: Country Analysis
    - 8.3.1. China Cough Assist Devices Market Outlook
      - 8.3.1.1. Market Size & Forecast
        - 8.3.1.1.1. By Value
      - 8.3.1.2. Market Share & Forecast
        - 8.3.1.2.1. By Type
        - 8.3.1.2.2. By Choice of Delivery
        - 8.3.1.2.3. By End User
    - 8.3.2. India Cough Assist Devices Market Outlook
      - 8.3.2.1. Market Size & Forecast
        - 8.3.2.1.1. By Value
      - 8.3.2.2. Market Share & Forecast
        - 8.3.2.2.1. By Type
        - 8.3.2.2.2. By Choice of Delivery
        - 8.3.2.2.3. By End User
    - 8.3.3. Japan Cough Assist Devices Market Outlook
      - 8.3.3.1. Market Size & Forecast
        - 8.3.3.1.1. By Value
      - 8.3.3.2. Market Share & Forecast
        - 8.3.3.2.1. By Type
        - 8.3.3.2.2. By Choice of Delivery
        - 8.3.3.2.3. By End User
    - 8.3.4. South Korea Cough Assist Devices Market Outlook
      - 8.3.4.1. Market Size & Forecast
        - 8.3.4.1.1. By Value

**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)

- 8.3.4.2. Market Share & Forecast
  - 8.3.4.2.1. By Type
  - 8.3.4.2.2. By Choice of Delivery
  - 8.3.4.2.3. By End User
- 8.3.5. Australia Cough Assist Devices Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Type
    - 8.3.5.2.2. By Choice of Delivery
    - 8.3.5.2.3. By End User
- 9. South America Cough Assist Devices Market Outlook
  - 9.1. Market Size & Forecast
    - 9.1.1. By Value
  - 9.2. Market Share & Forecast
    - 9.2.1. By Type
    - 9.2.2. By Choice of Delivery
    - 9.2.3. By End User
    - 9.2.4. By Country
  - 9.3. South America: Country Analysis
    - 9.3.1. Brazil Cough Assist Devices Market Outlook
      - 9.3.1.1. Market Size & Forecast
        - 9.3.1.1.1. By Value
      - 9.3.1.2. Market Share & Forecast
        - 9.3.1.2.1. By Type
        - 9.3.1.2.2. By Choice of Delivery
        - 9.3.1.2.3. By End User
    - 9.3.2. Argentina Cough Assist Devices Market Outlook
      - 9.3.2.1. Market Size & Forecast
        - 9.3.2.1.1. By Value
      - 9.3.2.2. Market Share & Forecast
        - 9.3.2.2.1. By Type
        - 9.3.2.2.2. By Choice of Delivery
        - 9.3.2.2.3. By End User
    - 9.3.3. Colombia Cough Assist Devices Market Outlook
      - 9.3.3.1. Market Size & Forecast
        - 9.3.3.1.1. By Value
      - 9.3.3.2. Market Share & Forecast
        - 9.3.3.2.1. By Type
        - 9.3.3.2.2. By Choice of Delivery
        - 9.3.3.2.3. By End User
- 10. Middle East and Africa Cough Assist Devices Market Outlook
  - 10.1. Market Size & Forecast
    - 10.1.1. By Value
  - 10.2. Market Share & Forecast
    - 10.2.1. By Type
    - 10.2.2. By Choice of Delivery

**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)

- 10.2.3. By End User
- 10.2.4. By Country
- 10.3. MEA: Country Analysis
  - 10.3.1. South Africa Cough Assist Devices Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Type
      - 10.3.1.2.2. By Choice of Delivery
      - 10.3.1.2.3. By End User
  - 10.3.2. Saudi Arabia Cough Assist Devices Market Outlook
    - 10.3.2.1. Market Size & Forecast
      - 10.3.2.1.1. By Value
    - 10.3.2.2. Market Share & Forecast
      - 10.3.2.2.1. By Type
      - 10.3.2.2.2. By Choice of Delivery
      - 10.3.2.2.3. By End User
  - 10.3.3. UAE Cough Assist Devices Market Outlook
    - 10.3.3.1. Market Size & Forecast
      - 10.3.3.1.1. By Value
    - 10.3.3.2. Market Share & Forecast
      - 10.3.3.2.1. By Type
      - 10.3.3.2.2. By Choice of Delivery
      - 10.3.3.2.3. By End User
- 11. Market Dynamics
  - 11.1. Drivers
  - 11.2. Challenges
- 12. Market Trends & Developments
  - 12.1. Recent Developments
  - 12.2. Mergers & Acquisitions
  - 12.3. Product Launches
- 13. Competitive Landscape
  - 13.1. Koninklijke Philips N.V.
    - 13.1.1. Business Overview
    - 13.1.2. Company Snapshot
    - 13.1.3. Products & Services
    - 13.1.4. Financials (As reported)
    - 13.1.5. Recent Developments
    - 13.1.6. SWOT Analysis
  - 13.2. Hillrom Holdings, Inc.
  - 13.3. Percussionaire Corp.
  - 13.4. Dima Italia Srl
  - 13.5. United Hayek Industries Inc
  - 13.6. McKesson Medical-Surgical Inc.
  - 13.7. Aetna Inc.
  - 13.8. International Biophysics Corporation
  - 13.9. PARI GmbH

**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)



- 13.10. Air Liquide Medical Systems S.A.
- 14. Strategic Recommendations
- 15. About Us & Disclaimer

**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)

**Cough Assist Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Automatic v/s Manual), By Choice of Delivery (Face Mask, Mouthpiece, Adapter), By End User (Hospitals & Clinics, Ambulatory Care Settings, Homecare, Others), By Region and Competition, 2020-2030F**

Market Report | 2025-05-30 | 188 pages | TechSci Research

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](mailto:support@scotts-international.com)

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4500.00
	Multi-User License	\$5500.00
	Custom Research License	\$8000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact [support@scotts-international.com](mailto: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"/>

**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)

Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-06-14"/>
		Signature	<input type="text"/>