Sleep Apnea Diagnostic and Therapeutic Devices Worldwide

Report Highlights

August 2008

Report Benefits

This report can help in:

- Assessing the market for Sleep Apnea Diagnostic and Therapeutic Devices worldwide, growth segments, and growth regions.
- Understanding market drivers and restraints, market segmentation, and competitive segmentation.
- Strategic planning and competitive strategy.
- Identifying opportunities for partnerships and alliances.

Key Takeaways

- The total US market for sleep apnea diagnostic and therapy devices is estimated to have been $1.12 billion in revenues in 2007, growing to $2.92 billion by the end of 2014 at a CAGR of 14.7 percent.
- Focus of product innovation is on development of more economical, wireless, portable, easy-to-use monitors for screening and PAP-based treatment devices for OSA and other types of sleep apnea.
- Other innovations include more comfortable facial interfaces and features of CPAP devices such as less noisy machines with long battery life..
- Type I and II monitors for sleep apnea diagnosis are the most commonly used in the US. New CMS reimbursement will open up the market to Type III devices for home testing.

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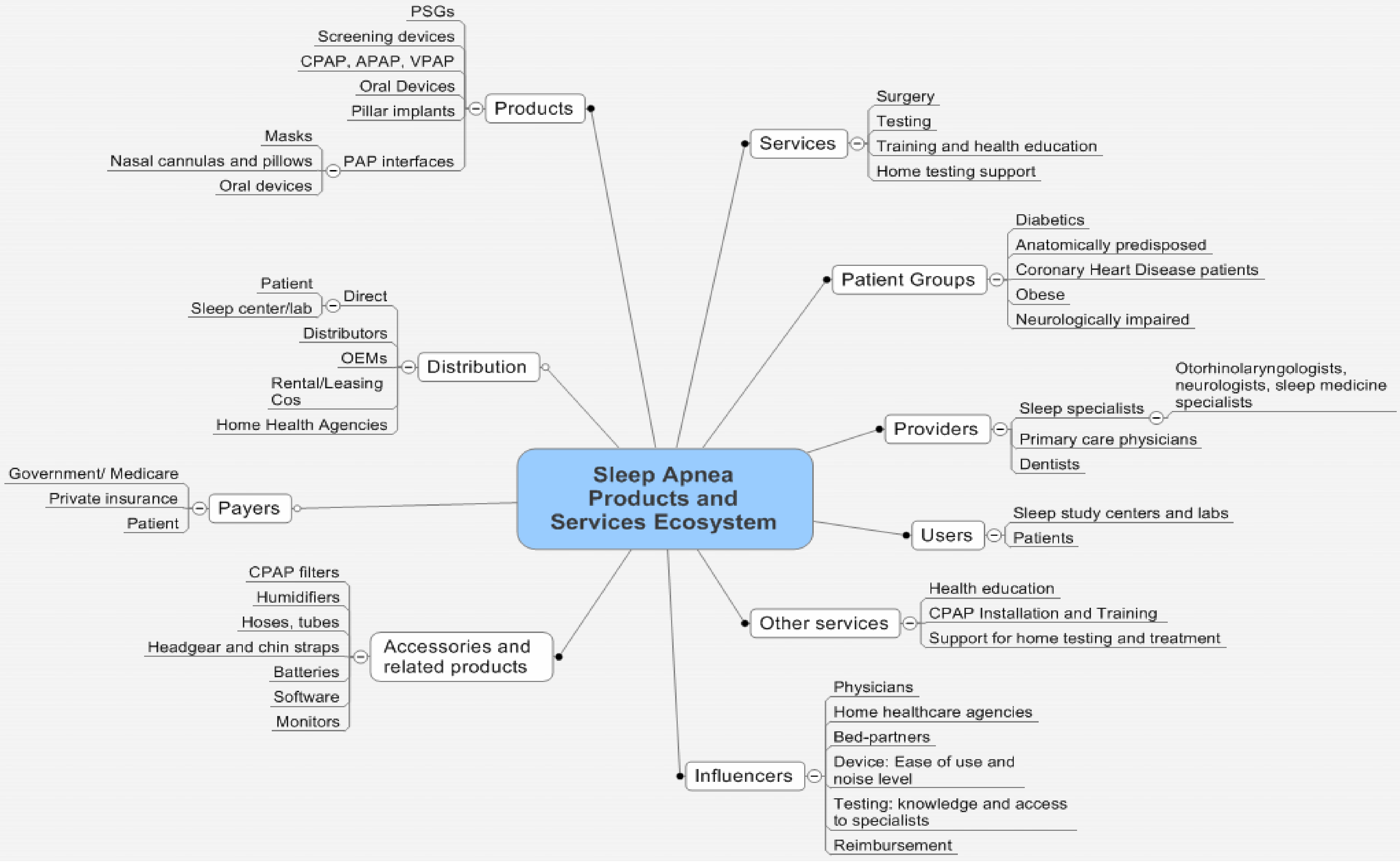
Sleep Apnea Devices Ecosystem



Key Market Drivers

- Increasing numbers of target age-group of 40-60 year olds around the world together with increasing incidence of co-morbid conditions such as diabetes, heart failure and hypertension.
- Greater acceptance of Type III devices and home testing that will tap into the prevalent undiagnosed patient population (currently estimated to be about 95% worldwide).
- Increased home testing is likely to also increase full PSG at a sleep lab for validation, determination of specific type of sleep apnea and CPAP titration tests. Therefore home testing will have a domino effect, driving the demand for more PSG testing and CPAP treatment.
- Mounting clinical evidence pointing to the decrease in risk of cardiovascular disease with CPAP treatment is likely to have a positive impact with patients who are suspected of having sleep apnea referred for testing and CPAP therapy.

Global Trends

- Trends toward home-testing, with Respironics and Resmed driving this segment.

- Consolidation of medical device and supplies manufacture is set to continue, raising the entry barrier for newcomers while existing leaders tap into previously under penetrated markets and establish themselves as providers of comprehensive, cost-effective diagnostic and therapeutic products and accessories with measurable clinical outcomes.

- Growth Opportunity: Improvement of compliance rates in the CPAP population, currently about 50% Manufacturers will need to focus on improving compliance with a greater focus at developing CPAP machines with user-friendly systems with more comfortable interfaces and integrated compliance monitors.

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Sample Market Table(s)

WORLD CPAP DEVICES MARKET BY COUNTRY / REGION (UNITS, 2006-2014)

Segment	2006	2007	2008	2009	2010	2011	2012	2013	2014	CAGR
United States										
Canada & LATAM										
Europe										
Japan										
Rest of the World (ROW)										
Total										

Notes:
1. CPAP devices deliver constant flow of pressurized air, and are used in OSA
2. Data are at the manufacturer level

Source: Marketstrat™

WORLD BI-LEVEL PAP DEVICES MARKET BY COUNTRY / REGION ($ MILL, 2006-2014)

Segment	2006	2007	2008	2009	2010	2011	2012	2013	2014	CAGR
United States										
Canada & LATAM										
Europe										
Japan										
Rest of the World (ROW)										
Total										

Notes:
1. Bi-PAP devices provide lower pressure during exhalation
2. Data are at the manufacturer level

Source: Marketstrat™

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Report Stats

Regions Covered	United States; Canada & Latin America; Europe; Japan; Rest of the World

Product/Market Segments	• Sleep Apnea Diagnostic Equipment
	  • Clinical PSG Equipment (Units & $)
	  • Ambulatory PSG Equipment (Units & $)
	  • Screening Devices (Units & $)
	• Sleep Apnea Therapeutic Equipment
	  • Flow Generators (Units & $)
	  • CPAP Devices (Units & $)
	  • Bi-Level PAP Devices (Units & $)
	  • Auto PAP Devices (Units & $)
	  • Facial Interfaces (Units & $)

Companies Profiled	~ 118 companies worldwide
Market Estimates/ Forecasts	In Units & US dollars for 2006-2014
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