



GRAND VIEW RESEARCH

Manual Resuscitators Market Size, Share & Trends Analysis By Type, By Modality, By Material, By Technology, By Patient Type, By Application, By End Use, By Region And Segment Forecasts, 2019 - 2026

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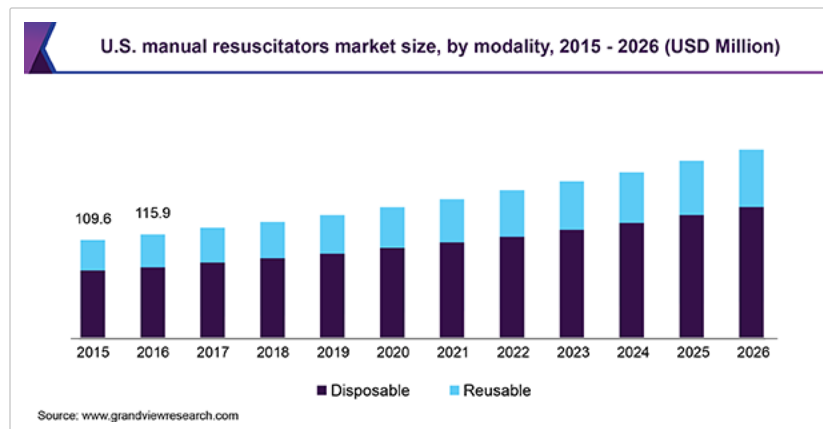
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[Report Summary](#)
[Table of Contents \(/industry-analysis/manual-resuscitators-market/toc\)](/industry-analysis/manual-resuscitators-market/toc)
[Segmentation \(/industry-analysis/manual-resuscitators-market/segmentation\)](/industry-analysis/manual-resuscitators-market/segmentation)
[Methodology \(/industry-analysis/manual-resuscitators-market/methodology\)](/industry-analysis/manual-resuscitators-market/methodology)
[Request a Free Sample \(/industry-analysis/manual-resuscitators-market/request/rs1\)](/industry-analysis/manual-resuscitators-market/request/rs1)

Industry Insights

The global manual resuscitators market size was valued at USD 436.1 million in 2018. The market of manual resuscitators also known as Bag Valve Masks (BVM), is expected to witness growth owing to the increasing incidence rates of cardiac arrest, increasing awareness initiatives and simulation websites, and the need for neonatal care.

In May 2016, the American Heart Association (AHA) released a snapshot of the heart disease status around the globe. The health data compiled from around 190 counties showed heart disease to be the prime cause of death. There are around 17.3 million deaths each year and the number is expected to rise over 23.6 million by 2030.



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International organizations are coming together to reduce the chances of cardiac arrest cases and improve lives. The AHA is working in collaboration with Cardiology Group and the United Nations to launch an evidence-based study. The study will be a collection of data from countries all around the world. The initiatives taken have reduced the overall death rates by 30.8% from 2001 to 2011.

Report Coverage & Deliverables

PDF report & online dashboard will help you understand:

- ✓ Competitive benchmarking
- ✓ Market forecasts
- ✓ Company market shares
- ✓ Market opportunities
- ✓ Latest trends & dynamics

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Type Insights

Self-inflating resuscitator dominated the market owing to their usability in hospital emergency departments such as neonatal and delivery ward and the increasing number of self-inflating resuscitators being launched. In January 2015, Laerdal filed a premarket approval (PMA) for its NeoNatalie resuscitator. The reusable self-inflating resuscitator was equivalent to Ambu Mark IV Baby Resuscitator. The NeoNatalie resuscitator was used for neonatal resuscitation up to 5kg.

Flow-inflating bags require an oxygen reservoir to ensure 100% oxygen flow. The flow-inflating resuscitators are majorly used in the neonatal care and intensive units. According to the 2012 American Academy of Pediatrics Instructor Update, infants need flow-inflating bags for administering Continuous Positive Airway Pressure Therapy (CPAP). As the available self-inflating bags cannot deliver CPAP, flow-inflating bags are preferred for neonatal care.

Modality Insights

On the basis of services, the market is segmented into coronary care, intensive care, neonatal intensive care, and others. The intensive care held the largest share in the service segment of the market due to increasing patient volume seeking intensive monitoring and nursing round the clock. In a few hospitals, there are ICUs specialize in certain patient types such as cardiac, surgical, medical, etc.

The coronary care segment, care which is being provided at a dedicated unit in the hospitals called Coronary Care Unit (CCU), is expected to grow at the fastest rate over the forecast period. In addition, increased patient preference towards secondary health care for a shorter hospital stay and dedicated monitoring is another key factor driving the market growth.

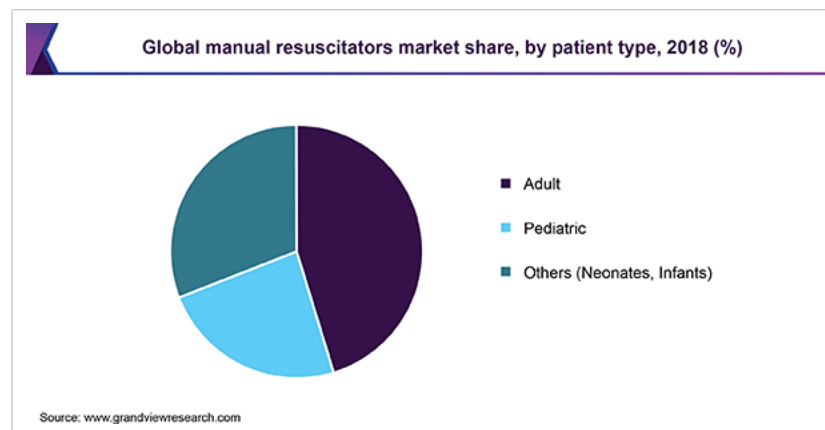
Material Insights

On the basis of material, the manual resuscitator market is classified as [silicone](https://www.grandviewresearch.com/industry-analysis/silicone-market) (<https://www.grandviewresearch.com/industry-analysis/silicone-market>), PVC, and rubber. The silicone segment held the largest market share in 2018 due to its extensive use in the hospitals and outpatient setting for treating adult and pediatric patient suffering from respiratory or heart disease.

However, [PVC](https://www.grandviewresearch.com/industry-analysis/polyvinyl-chloride-pvc-market) (<https://www.grandviewresearch.com/industry-analysis/polyvinyl-chloride-pvc-market>) is projected to grow at a highest rate over the forecast period. Even though silicone resuscitators are more expensive when compared with PVC or rubber but in the long term use, they are more economical when compared with disposable resuscitators.

Technology Insights

Manual resuscitators market based on technology is classified as resuscitators with pop-off valve, PEEP valve and others. Most of the resuscitators come only with the pressure valves and have the slot to accommodate PEEP valve, and thus they fall into others category. Generally, the resuscitators only with the pressure valve are used for treating medical condition in adults.



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The others segment held the largest market share in 2018 due to extensive use in hospitals for treating adult patients. However, pop-off valve segment is anticipated to grow rapidly at a high CAGR over the forecast period. The demand for pop-off valve is growing at the neonatal intensive care units (NICUs) as most of the neonates require respiratory support at birth.

Patient Type Insights

Based on patient type, the market is divided into adult, pediatric and others. The others segments include the neonates and infants patient population. The adult segment held the largest market share in 2018 due to the rising prevalence of Chronic Obstructive Pulmonary Disease (COPD) and cardiac diseases among the population which include large geriatric patient pool. However, others segment which include neonates and infants patient population is the fastest growing segment and is anticipated to grow at a high CAGR over the forecast period.

Application Insights

Based on application the manual resuscitators market is divided into Chronic Obstructive Pulmonary Disease (COPD), cardiopulmonary arrest, and others. The other segment include the application of resuscitators during anesthesia and for treating conditions like asthma. The COPD segment held the largest market share in 2018 attributed to rising burden of the diseases.

According to estimates from the Global Burden of Disease Study, COPD was prevalent in more than 300 million people in 2013. The disease burden and its financial impact is predicted to increase with time, mainly due to aging population. COPD is the third leading cause of death worldwide. However, cardiopulmonary arrest segment is expected to gain market share and is projected to grow at a rapid pace during the forecast period.

End-Use Insights

Hospitals dominated the manual resuscitators end use market in 2018. BVMs in hospitals are used in cases of cardiac arrest, intensive care, and neonatal care. The American Health Association (AHA) published the first guideline for reviewing, researching, and reporting in-hospital resuscitation. The in-hospital Utstein Style was published as a mechanism of international standardization and is used as a reporting system for patient monitoring. For instance, the AHA has established National Registry of Cardiopulmonary Resuscitation (NRCPR), which acts as a multi-site data collection source. The registry enables inter-facility comparison between various hospitals, establishing a standardized mechanism.

The use of out-of-hospital/prehospital/community resuscitators is expected to witness a faster growth owing to the increasing need to provide bystander cardiopulmonary resuscitation and the related awareness initiatives taken. The main reasons why bystanders are not able to perform CPR are the unavailability of CPR kits in the vicinity and lack of training. In July 2014, the British Heart Foundation improved the public access to resuscitators by committing to fund the initiative, where a national public access defibrillators database would be set up in the UK to overcome these issues.

Regional Insights

North America held the largest market share in 2018. The demand for resuscitators in North America is expected to witness high growth owing to increasing cases of cardiac arrest and neonatal ventilation.

Moreover, companies are launching newer technologically advanced products to provide state-of-the-art resuscitation. In November 2015, Foothills Hospital developed a device to resuscitate a baby while its umbilical cord is still attached. Inspire, a portable integrated station that supports transfusion and resuscitation is expected to enhance urgent care.

Moreover, initiatives to control the outside hospital cardiac arrest are expected to drive the demand for resuscitators. Research networks, such as the Resuscitation Outcomes Consortium (ROC), are established to study better ways to treat outside hospital cardiac arrest and trauma cases. The ROC is a clinical research network of ten regional centers throughout the U.S. and Canada.

Asia Pacific is expected to witness the fastest growth owing to the increasing need for ventilation. Realizing the need for development, governments have taken efforts to bring in newer technologies, which can be user-friendly and effective. In October 2015, the government of India introduced the augmented infant resuscitator which provided detailed information on resuscitation to healthcare providers.

Moreover, the government of India has also undertaken initiatives to improve the in-hospital neonatal care under the National Health Mission 2015. Under this initiative, the government of India was expected to provide 2,706 hospitals as first referral units, 14,000 newborn care corners, and 2,020 newborn stabilization units.

Manual Resuscitators Market Share Insights

Key industry contributors are Weinmann Emergency, Laerdal Medical, Hersill, HUM Systems for Life, Hersill, Me.Ber. srl, Ambu A/S, Medline Industries, Philips Healthcare, Hopkins Medical Product, Drager Medical AG and Co., ResMed, Inc., Covidien Plc, GE Healthcare, and CareFusion.

Companies such as Laerdal provide resuscitation training material and workshops to increase the awareness towards cardiac resuscitation. In January 2016, Laerdal Medical and SonoSim, Inc. collaborated to launch the ultrasound solution for SimMom and SimMan. The solution provides classroom learning related totrauma care, critical care, and pregnancy.

Moreover, companies are following mergers and acquisitions to expand their presence in this market. In July 2018, Medline industries acquired NeuroGym Technologies, a therapy and rehabilitation equipment maker based out at Ottawa. With this acquisition, Medline focusses to offer improved solutions for post-acute healthcare in North America.

Report Scope

Attribute	Details
Base year for estimation	2018
Actual estimates/Historic data	2015 - 2017
Forecast period	2019 - 2026
Market representation	Revenue in USD million & CAGR from 2019 to 2026
Regional Scope	North America, Europe, Asia Pacific, Latin America, Middle East & Africa
Country scope	U.S., Canada, UK, Germany, France, Italy, Spain, India, China, Japan, Australia, Brazil, Mexico, South Africa, UAE
Report coverage	Revenue forecast, company share, competitive landscape, growth factors & trends
15% free customization scope (equivalent to 5 analyst working days)	If you need specific market information, which is not currently within the scope of the report, we will provide it to you as a part of customization

Segments Covered in the Report

This report forecasts revenue growth and provides an analysis on the latest trends in each of the sub-segments from 2015 to 2026. For this study, Grand View Research has segmented the manual resuscitators market based on type, modality, material, technology, patient type, application, and end-use:

Type Outlook (Revenue, USD Million; 2015 - 2026)

- Self-inflating Resuscitator
- Flow-inflating Resuscitator
- T-piece

Modality Outlook (Revenue, USD Million; 2015 - 2026)

- Disposable
- Reusable

Material Outlook (Revenue, USD Million; 2015 - 2026)

- Silicon
- PVC
- Rubber

Technology Outlook (Revenue, USD Million; 2015 - 2026)

- Pop-off valve
- PEEP Valve
- Others

Patient Type Outlook (Revenue, USD Million; 2015 - 2026)

- Adult
- Pediatric
- Others(Neonates, Infants)

Application Outlook (Revenue, USD Million; 2015 - 2026)

- Chronic obstructive pulmonary disease
- Cardiopulmonary arrest
- Others (Anesthesia, Asthma)

End-Use Outlook (Revenue, USD Million; 2015 - 2026)

- Hospital
- Out-of-hospital (Primary care, home care, community care)
- ASC
- Military
- Others (Specialized diagnostic centers, specialized clinics)

Region Outlook (USD Million; 2015 - 2026)

- North America
 - U.S.
 - Canada
- Europe
 - UK
 - Germany
 - France
 - Italy
 - Spain
- Asia Pacific
 - China
 - Japan
 - India

- Australia
- Latin America
 - Brazil
 - Mexico
- Middle East & Africa
 - South Africa
 - UAE

Key questions answered by the report

- ▶ What was the market size from 2013 to 2015?
- ▶ What will be market growth till 2024 and what will be the resultant market forecast in the year?
- ▶ How will the market drivers, restraints and future opportunities affect the market dynamics and a subsequent analysis of the associated trends?
- ▶ What segment or region will drive or lead market growth and why?
- ▶ A comprehensive mapping of the competitive landscape and the market participants' behavior.
- ▶ What are the key sustainability strategies adopted by market players? An In-depth analysis of these strategies and their impact on competition and growth

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