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Augmenting Value

March 2020

ER
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Category – Market Research

COVID'19 Impact From What's "Next"? to "Now" What? – Tapping Demand Surge to Scaling Ventilator Manufacturing

Ventilator Market in India & Demand Outlook till 2025

Coverage >



COVID-19 – From 'Next to Now'
– Current capacity track



Demand Surge Scenarios
for India



Purpose – Addressing
Demand Surge & Scaling
Up Capacities



Domestic Manufacturing &
New Contributing Units –
Action Plan



State wise – Capability &
Capacity Escalation –
Mapping Change for EVER



Market Response Factored
– Feed from Top Domestic
& International Players

MARKET RESPONSE
enirrac consulting

Report Rationale



COVID'19 – Will it be the silver lining for DVMs (domestic ventilator manufacturers) amidst all gloom?

The existing scenario shall open fresh and immediate opportunities for existing players as well as for new entrants. Players with strong manufacturing base irrespective of the industry are likely to reap high gains



enirrac reports

Enirrac reports are a combination of logical thinking and analysis on industry issues that matter the most and assist our clients to stay ahead of the market happenings.



**Value
Augmentation**

The study presents major demand centers in each region with indicating the medical facilities driving maximum need as per the type of ventilators.



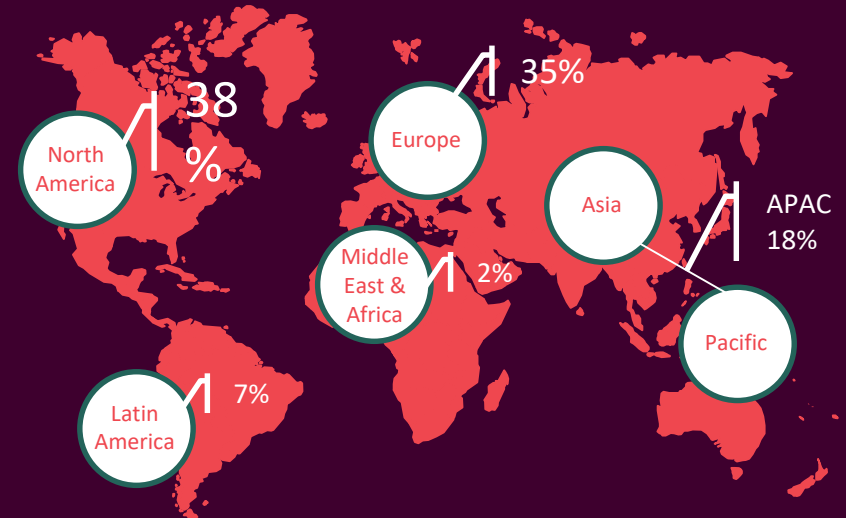
Global Ventilators Market & Indian Context – A Glance

The global ventilators market is expected to grow at a moderate rate of 4.6% on CAGR basis from FY 2019 to FY 2026. In the global context the largest share is of North America comprising of established markets of USA & Canada. Followed by the share of NORAM shall be the region of Europe which is at 35% of the overall global market size for ventilators. Interestingly, the growth market of A-PAC region lags in the share at 18% but is expected to grow strong in coming years with relatively highest growth rate amongst all other regions. Regions of Latin America & Africa are having lower shares at 7% and 2% respectively. The growth observed in the Americas & European segment is at large due to the high target disease prevalence & extensive research and development which in turn is fueling the growth for the market. As per application critical care takes the largest share followed by homecare setting and NICU, respectively. These three segment combinedly contribute 94% of overall market share.

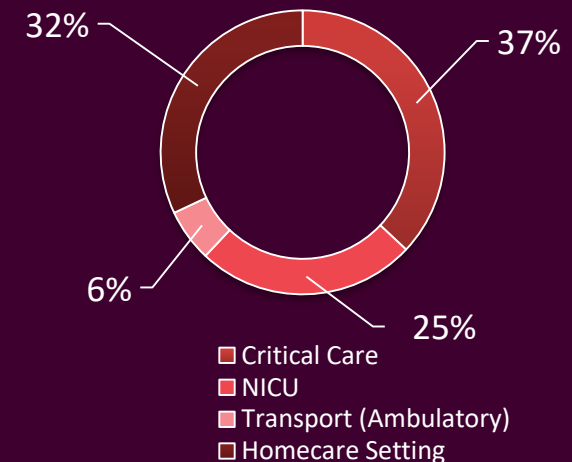
2019-2026, the ventilator market will accelerate at a CAGR of 4.6%



Market Share of Ventilators in Key Geographies - World

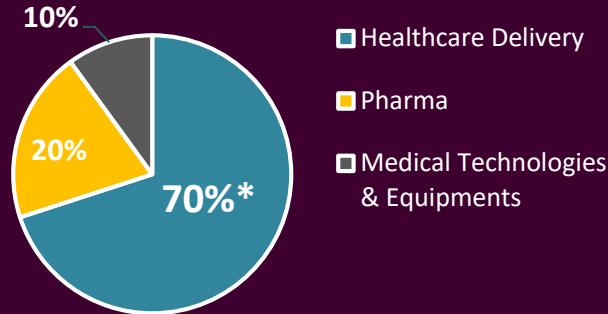


Global Ventilator Share by Type of End Use Application



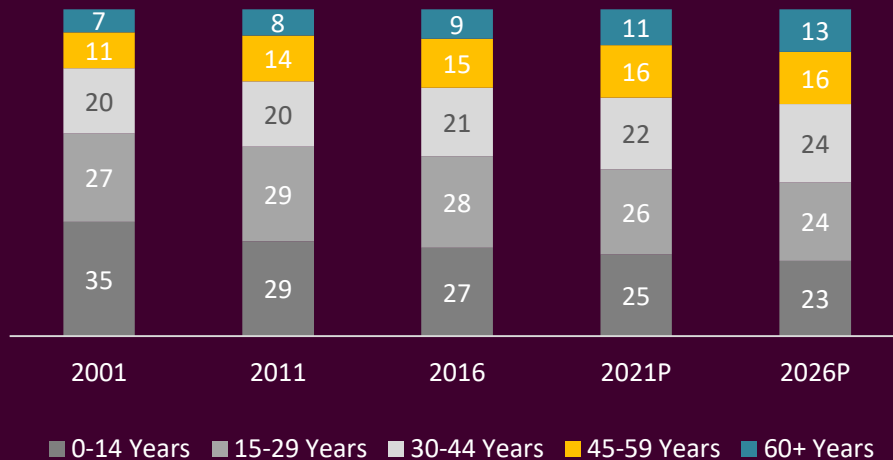
India – Hugely Under Penetrated Market with Attractive Dynamics

Indian Healthcare Delivery Split as on FY 2019



Demographic Shift in India - %age of Population by age group

Growing working class population between ages 45 and 60 from 22% in 2011 to a projected 29% in 2026



COVID'19 – Why India is No Different from World Regards the “ Ventilator” Requirement

The current global health crisis doesn't need any introduction and is one of the biggest ever witnessed by the mankind. With more and more infected cases getting registered amid COVID'19, providing adequate medical facilities have become a challenge even for the nations with best healthcare infrastructure. In such a scenario one of the critically required resource in many hospitals across the globe is “Ventilator” which is already constrained, with India being no different. Amidst this outbreak the demand for ventilators in the country is bound to shot up not only to support the current situation but as a preparedness for future too. This is where the domestic manufacturing comes in picture. The government of India has already initiated steps in this direction and has asked the auto giants in the country to utilize their manufacturing facilities to produce ventilators. Majors such as Mahindra & Mahindra, Tata Motors, Maruti Suzuki and Hyundai are most likely to be the flag bearers of this initiative. As per the industry estimation India will need an approximate of 1.5 to 2 lakhs of ventilators by May 2020. In such a war footing scenario eninrac's research study on “ Ventilator Market in India and Outlook till 2025” can be a path finder and assist in country's biggest need of current time.

By the medium of this report eninrac team attempts to assess the impact of global health crisis on Indian ventilator market and its role in flattening the curve. The report covers demand outlook of all type of ventilators in India by government and privately owned hospitals. Further, it also focuses on demand response by the active ventilator manufacturers in the country and the potential new ones.

Market Assessment Model

For estimating the ventilator market size in India with factored outlook till 2025 we did a deep dive study covering contours and bases in relation to the same

The market data for ICU ventilators in India is very discreet and to reach a robust information set a deep dive analysis was required and therefore a multiple level channel check and assessment was done. We considered civil, district, community health clinics, group hospitals (both privately & government held) and AIIMS units. Entire country was split into four distinct regions namely Northern, Eastern, Western and Southern with analysis being done for each state in respective regions. For more details about the report contact eninrac team.

Contact Person – Nivi Bakhru
Email id – nivi.bakhru@eninrac.com
Contact - +91 7055517333

Contents & Coverage

1. COVID-19 Impact – From ‘Next to Now’ – Current capacity track of ventilators in India on State Wise Basis
2. Demand Surge Scenario Wise Assessment of Ventilators Market in India till 2025 – By Application & State Wise Split
 - a. ICU Ventilators
 - b. Transport Ventilators
 - c. BiPAP & CPAP Machines
3. Demand Surge Scenario Assessment of Ventilators Market in India till 2025 – By Type & State Wise Split
 - a. Adult & Pediatric Ventilators
 - b. Neonatal/Infant Ventilators
 - c. All in One
4. Demand Surge Scenario Assessment of Ventilators Market in India till 2025 – By Technology & State Wise Split
 - a. Invasive
 - b. Non-Invasive
5. Demand Surge Scenario Assessment of Ventilators Market in India till 2025 – By Modes & State Wise Split
 - a. Auto Modes
 - b. Specialized Modes
 - c. Volume & Pressure Controlled Modes
6. Assessment of Ventilators Demand in India – Amidst COVID 19 Outbreak & Long-Range Outlook 2025
7. Assessment of Current Manufacturing Market of Ventilators in India – Company Profiles & Detailed Analytic Feed



The life of a man consists not in seeing visions and in dreaming dreams, but in active charity and in willing service

- Henry Wadsworth Longfellow

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vantedge⁺

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Contact – Head Office

Address : 5th floor, Caddie Commercial Tower, Aerocity (DIAL), New Delhi - 110037

Contact – NCR Office

Address : 7th Floor, I-Thum Towers, Noida, NCR Region, Uttar Pradesh, India

Contact – Mumbai Office

Address : 4th Floor Duru House, Juhu, Opposite JW Marriott, Mumbai, Maharashtra



connect@enirrac.com



+91 120 4147 000



www.enirrac.com