

***Respiratory Care and Ventilator Market in Japan:
Key Research Findings 2010***

➤ **Research Outline**

Yano Research Institute has conducted a study on the respiratory care and ventilator market in Japan with following conditions.

1. Research period: August to December 2010
2. Research targets: Manufacturers, importers, manufacturing sellers, sales distributors
3. Research methodologies: Face-to-face interviews, telephone surveys

➤ **Key Findings**

- ◆ Market size of long-term ventilators: The fiscal 2009 market size was a little over 5,200 units, including new rentals, as sales largely increased due to the purchases with use of supplementary budget for influenza measures. The 2010 market size would be a little over 5,100 units due to the delay in budgeting at medical institutions.
- ◆ Company trends of long-term ventilators: The sales quantity of top companies are stable during fiscal 2009 to 2010. Sales performance is polarized between models.
- ◆ Rentals (home mechanical ventilation, hospitals): New rental shipments of NPPV are around 1,400 units annually, including model changes. Philips launched “Triogy 100/200. New rental/sales shipments of TPPV are 200 to 300 units. Chest began rentals with GE Healthcare products.
- ◆ Market trends of emergency ventilators: The fiscal 2009 market size was 975 units and the size would be nearly 1,000 units for fiscal 2010. Kohken Medical launched “ANSWER.” Wako Shoji delivers “Medumat a” through its proprietary route and “Medumat Easy” through Nihon Kohden route.
- ◆ Market trends of CPAP: The market size of nasal CPAP in fiscal 2009 was a little over 35,000 units (net increase was below 18,000 units), based on the quantity of each company’s new shipments (rentals and some sales, including model changes). Teijin and Philips hold a large market share. Koike Medical entered the market with Metran’s products.
- ◆ Market trends of sleep apnea equipment: The fiscal 2009 to 2010 market size was around 1,000 units for simple type and around 90 units for diagnostic polygraphy.

➤ **Report format:**

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