

WINTERGREEN RESEARCH, INC.

**Oxygen Concentrator Market Opportunities, Strategies,  
and Forecasts, 2005 to 2011**

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**Oxygen Concentrator**

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*Picture by Susie Eustis*

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Lexington, Massachusetts**

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## **CHECK OUT THESE KEY TOPICS**

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*OXYGEN CONCENTRATOR MARKET SHARES*  
*OXYGEN CONCENTRATOR MARKET FORECASTS*  
**Home Oxygen Concentrator Market Driving Forces**

### **Treatment Trends**

U.S. Healthcare Delivery Trends  
Marketing Globally  
*PROSPECTIVE PAYMENT SYSTEMS (PPS)*  
***HEMECARE MARKET GROWTH FACTORS***  
***HEMECARE INFORMATION SYSTEMS MARKET STRATEGY***  
***TECHNOLOGICAL TRENDS***  
***COMPRESSOR FOR CO2 CONCENTRATORS***  
***ADVANCED TECHNOLOGY FRACTIONATOR***  
***MEDICAL COMPRESSORS***  
***UOP LLC***  
***RESPIRATORY DISEASE CONDITIONS***  
***UNIFIED SUPPLY NETWORK***

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## **Oxygen Concentrator Market Opportunities, Market Forecasts, and Market Strategies, 2005-2011**

Homecare is poised to grow based on the creation of new services efficiencies for the healthcare industry. Systems automate care delivery, permitting remote tracking from central locations to the bedside, eliminating unnecessary visits to the home. Patients and family gain more control over the care delivery. Care can be delivered in familiar settings.

The oxygen concentrator market participants offer a wide range of products, services, training, and support, whose purpose is to make it easier and more enjoyable for people needing homecare to take advantage of the convenience delivered by oxygen concentrators. Reimbursement drives markets.

Worldwide oxygen concentrator markets at \$349 million in 2005 are anticipated to reach \$1.2 billion by 2011. Growth is spurred by increasing trends toward homecare and the desire for lifestyle by older people who may have some illness. Smoking and air pollution are the biggest causes of respiratory disease.

## Companies Profiled

### Market Leaders

Invacare  
Respironics  
Sunrise Medical / DeVilbiss

### Market Participants

AirSep  
Chart Industries / Caire  
Gardner Denver / Thomas Industries  
Mada Medical

CHAD Therapeutics  
Drager Medical  
Hudson RCI  
Sievetek / Oxygen Plus

# Oxygen Concentrator Strategies and Forecasts, 2005-2011

## REPORT METHODOLOGY

THIS IS THE 255TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

**YOU MUST HAVE THIS STUDY**

# Oxygen Concentrator Market Opportunities, Strategies, and Forecasts, 2005 to 2011

## Table of Contents

### OXYGEN CONCENTRATOR EXECUTIVE SUMMARY

<b>OXYGEN CONCENTRATOR EXECUTIVE SUMMARY</b>	<b>ES-1</b>
Home Oxygen Concentrator Market Driving Forces	ES-1
Oxygen Concentrator Market Shares	ES-3
Oxygen Concentrator Market Forecasts	ES-4

### HOME HEALTHCARE MARKET DESCRIPTION

<b>1. HOME HEALTHCARE MARKET DESCRIPTION</b>	<b>1-1</b>
1.1 Treatment Trends	1-1
1.2 U.S. Healthcare Delivery Industry	1-3
1.2.1 Competition Forms Basis Of U.S. Medical Care Services Delivery	1-3
1.3 European Homecare Market Trends	1-4
1.4 Marketing Globally	1-5
1.5 Prospective Payment System (PPS)	1-7
1.5.1 Home Care Services Billing Issues	1-8
1.5.2 Managed Care Requirements	1-10
1.6 Market Drivers For Healthcare Cost Containment	1-13
1.6.1 Managed Care Organization Impact	1-14
1.6.2 Reasons Home Health Care Has Gained Wide-Spread Acceptance	1-14
1.6.3 Managed Care Change In The Healthcare Industry	1-15
1.6.4 Homecare For People With Long Term Disabilities	1-15
1.7 Homecare Market Growth Factors	1-16
1.7.1 Growth In Population Over Age 65	1-17
1.8 Worldwide Homecare Information Systems Market Distribution	1-17
1.8.1 Delivery Of Non-Acute Health Care	1-17
1.8.2 Leveraging Distribution Channels	1-18
1.8.3 Worldwide Homecare Information Systems Market Positioning	1-18
1.9 Increased Need For Information Technology	1-20
1.9.1 Medical Error	1-21
1.10 Shortcomings Of Traditional Healthcare Information Systems	1-22
1.11 Homecare Information Systems Market Strategy	1-23
1.11.1 Integrated Healthcare Information Technology Solutions	1-24
1.11.2 Flexible Product-Delivery Options	1-24
1.11.3 Leveraging Existing Customer Base	1-25
1.12 Homecare Information Systems Market Trends	1-26
1.12.1 Clinician Support For Spending Less Time At The Desktop And More Time Taking Care Of Patients	1-27

### OXYGEN CONCENTRATOR MARKET FORECASTS

<b>2. OXYGEN CONCENTRATOR MARKET FORECASTS</b>	<b>2-1</b>
2.1 Home Oxygen Concentrator Market Driving Forces	2-1

2.2	Home Oxygen Market Segments	2-4
2.3	Market Growth Factors	2-5
2.4	Unified Supply Network	2-7
2.4.1	Support For Distributors	2-7
2.5	Oxygen Concentrator Market Shares	2-8
2.6	Oxygen Concentrator Market Forecasts	2-9

**OXYGEN CONCENTRATOR PRODUCT DESCRIPTIONS**

<b>3. OXYGEN CONCENTRATOR PRODUCT DESCRIPTIONS</b>	<b>3-1</b>	
3.1	Oxygen Concentrator Product Functions	3-1
3.2	Respironics Oxygen Concentrators	3-1
3.2.1	Respironics Millennium Concentrator	3-2
3.2.2	Respironics Millennium™ M10 Concentrator with OPI® or without OPI®	3-3
3.3	Sunrise / DeVilbiss	3-6
3.3.1	Portable Enrichment Of Normal Room Air	3-7
3.3.2	DeVilbiss® Five Liter Concentrator	3-8
3.3.3	Sunrise / DeVilbiss 303DS Oxygen Concentrator	3-9
3.4	Invacare Oxygen Concentrator	3-11
3.4.1	Telemetry System	3-13
3.4.2	Invacare Careguard 3 Oxygen Concentrator	3-14
3.4.3	Invacare 5 Oxygen Concentrator	3-14
3.4.4	Invacare Platinum 10 Oxygen Concentrator with Sens O2	3-14
3.4.5	Invacare Platinum XL 5-Liter Oxygen Concentrator	3-15
3.4.6	Invacare Platinum 10 Oxygen Concentrator	3-17
3.4.7	Invacare Platinum XL 5-Liter Oxygen Concentrator	3-17
3.4.8	Invacare Precise Rx Pediatric Flowmeter	3-17
3.4.9	Invacare Check O2 Plus(TM) Concentrator Analyzer	3-18
3.5	AirSep	3-19
3.5.1	AirSep Positioning	3-20
3.5.2	AirSep LifeStyle	3-20
3.5.3	NewLife Elite	3-21
3.5.4	FreeStyle	3-22
3.5.5	NewLife Intensity	3-23
3.5.6	QuietLife 5	3-23
3.5.7	QuietLife 3	3-24
3.6	Oxlife	3-24
3.6.1	Oxlife Excel Oxygen Concentrator (3LPM)	3-26
3.6.2	Oxlife L-3 Oxygen Concentrator (3LPM)	3-26
3.6.3	Oxlife L-6 Oxygen Concentrator (6LPM)	3-27
3.6.4	The Toaster Oxygen Concentrator	3-28
3.7	Sim Italia Oxygen Concentrator	3-29
3.8	Sequal Technologies	3-30
3.8.1	Integra	3-30
3.8.2	SeQual Technologies Launches the Integra® 7 EZ	3-31

**OXYGEN CONCENTRATOR TECHNOLOGY**

<b>4. OXYGEN CONCENTRATOR TECHNOLOGY</b>	<b>4-1</b>	
4.1	Technological Trends	4-1
4.2	Zeolite	4-2
4.3	Compressor For O2 Concentrators	4-3
4.4	Advanced Technology Fractionator	4-4

4.4.1	Pressure Swing Adsorption Principles	4-4
4.4.2	Conventional Oxygen Concentrators	4-5
4.4.3	Conventional Two-Bed Oxygen Concentrator	4-6
4.4.4	Multi Bed Oxygen Concentrators	4-7
4.4.5	ATF-Based Concentrator	4-9
4.4.6	ATF Endurance Testing Status	4-12
4.5	UL Approved	4-13
4.6	Medical Compressors	4-14
4.6.1	Thomas Industries	4-14
4.7	UOP LLC	4-16
4.7.1	UOP MOLSIV Adsorbents	4-17
4.7.2	Molecular Sieves	4-17
4.8	Respiratory Disease Conditions	4-18
4.8.1	Increased Demand Impacts Industry	4-19
4.8.2	Bronchiectasis	4-19
4.8.3	Chronic Bronchitis	4-20
4.8.4	Chronic Obstructive Pulmonary Disease (COPD)	4-21
4.8.5	Emphysema	4-21
4.8.6	Muscular Dystrophy	4-22
4.8.7	Respiratory Syncytial Virus (RSV)	4-24
4.9	Asthma	4-24

**OXYGEN CONCENTRATOR COMPANY PROFILES**

<b>5. OXYGEN CONCENTRATORS COMPANY PROFILES</b>	<b>5-1</b>	
5.1	AirSep	5-1
5.2	CHAD Therapeutics	5-4
5.3	Chart Industries / Caire	5-6
5.3.1	s BioMedical Group Achieves Certification for Medical Products	5-6
5.4	DeVilbiss	5-6
5.5	Drager Medical	5-7
5.6	Gardner Denver / Thomas Industries	5-7
5.6.1	Thomas Industries	5-7
5.7	Hudson RCI	5-12
5.7.1	Teleflex Medical	5-12
5.8	Invacare	5-13
5.8.1	Invacare Net Sales	5-13
5.9	Mada Medical	5-17
5.10	Respironics	5-19
5.10.1	Respironics Net Sales	5-19
5.10.2	Respironics Homecare Products	5-19
5.10.3	Sleep and Home Respiratory Care	5-20
5.10.4	Critical Care	5-20
5.10.5	Respiratory Drug Delivery	5-20
5.10.6	International	5-21
5.11	Sievetek / Oxygen Plus	5-22
5.12	Sunrise Medical	5-22
5.12.1	Respiratory Products	5-23

**List of Tables and Figures****OXYGEN CONCENTRATOR EXECUTIVE SUMMARY**

Table ES-1	ES-2
Home Medical Market Driving Forces	
Figure ES-2	ES-3
Worldwide Oxygen Concentrator Market Shares, 2004	
Figure ES-3	ES-5
Worldwide Oxygen Concentrator Market Forecasts, 2005-2011	

**HOME HEALTHCARE MARKET DECSRIPTION**

Table 1-1	1-2
Factors Relating To Value Of Home Health Care Over Institutional Care	
Table 1-2	1-6
Marketing Globally	
Table 1-3	1-8
Home Care Services Billing Issues	
Table 1-4	1-9
Home Care Services Billing Changes Needed	
Table 1-5	1-11
JCAHO ORYX Requirements	
Table 1-6	1-16
Homecare Market Growth Factors	
Table 1-7	1-19
Worldwide Homecare Information Systems Market Positioning	
Table 1-8	1-23
Strategies For Offering Technology Solutions To The Home Healthcare Industry	
Table 1-9	1-26
Homecare Information Systems Market Trends	

**OXYGEN CONCENTRATOR MARKET FORECASTS**

Table 2-1	2-2
Home Medical Market Driving Forces	
Table 2-2	2-3
Home Medical Oxygen Concentrator Systems Market Forces	
Table 2-3	2-6
Factors Contributing To Growth Of Oxygen Concentrator Markets	
Figure 2-4	2-8
Worldwide Oxygen Concentrator Market Shares, 2004	
Table 2-5	2-9
Worldwide Oxygen Concentrator Market Shares, 2004	
Figure 2-6	2-10
Worldwide Oxygen Concentrator Market Forecasts, 2005-2011	
Table 2-7	2-11
Worldwide Oxygen Concentrator Market Forecasts, 2005-2011	

**OXYGEN CONCENTRATOR PRODUCT DESCRIPTIONS**

Table 3-1	3-4
Respironics Millennium Product Features	
Table 3-2	3-5
Respironics Millennium Specifications	
Table 3-3	3-9
DeVilbiss 303DS Oxygen Concentrator Features	
Table 3-4	3-10
DeVilbiss 303DS Oxygen Concentrator Functions	
Table 3-5	3-12
Advantages Of Invacare Check O2Plus	
Table 3-6	3-13
Advantages Of ConnectO2 Telemetry System	
Table 3-7	3-16
Invacare Platinum XL 5-Liter Oxygen Concentrator Specifications	
Table 3-8	3-18
Precise Rx Pediatric Flowmeter Features	
Table 3-9	3-25
Oxlife Features	
Table 3-10	3-26
Oxlife Excel Oxygen Concentrator (3LPM) Specifications	
Table 3-11	3-27
Oxlife L-3 Oxygen Concentrator (3LPM) Specifications	
Table 3-12	3-28
Oxlife L-6 Oxygen Concentrator (6LPM) Specifications	
Table 3-13	3-29
Toaster Oxygen Concentrator Standard Features	
Table 3-14	3-30
Integra 5L Features / Benefits	

**OXYGEN CONCENTRATOR TECHNOLOGY**

Table 4-1	4-8
Comparison Of Multi Bed And A Typical Oxygen Concentrator	
Table 4-2	4-10
ATM-Based Concentrator Major Components	
Figure 4-3	4-11
Comparison Of A 5 Liter Per Minute (LPM) Capacity Conventional Oxygen Concentrator With A 5 LPM ATF System	
Table 4-4	4-13
UL Approval Functions	
Table 4-5	4-15
Thomas Industries Compressor Features	

**OXYGEN CONCENTRATOR COMPANY PROFILES**

Table 5-1	5-2
AirSep Products	
Table 5-2	5-3
AirSep Corporation Registered Trademarks and Trademarks	

Table 5-3  
Mada Medical Products

5-17

## **ABOUT THE COMPANY**

**WINTERGREEN RESEARCH**, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

IT IS A LUXURY REALLY, AVAILABLE TO ONLY A VERY FEW PEOPLE, TO BE ABLE TO GATHER INFORMATION, LOTS OF INFORMATION FROM READING MASSIVE AMOUNTS OF CONTENT, AND THEN TRYING TO MAKE SENSE OF THAT CONTENT. THE ABILITY TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS THE THIRD ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

**WINTERGREEN RESEARCH**, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

**ABOUT THE PRINCIPAL AUTHORS**

**ELLEN T. CURTISS**, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

**SUSAN EUSTIS**, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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