

# **The U.S. Sleep Market: A Market, Competitive & Operating Analysis**

**May 2021**

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## **Demographics of Persons With Sleep Disorders**

**36-46**

- Scope of affected population: no. and type persons with... insomnia, sleep apnea, narcolepsy, restless legs syndrome, no. of children, women, seniors with sleep disorders
- Findings of Natl. Sleep Foundation's "Sleep in America" poll
- No. of hours of sleep daily, by race (Natl. Health Interview Survey)
- Effects of the Pandemic and Recession on Sleep
- List of sleep disorder statistics
- The National Sleep Foundation's 2020 *Sleep in America*® Poll, findings
- Prevalence of sleeping problems by major countries, U.S. vs. Europe, Japan
- CDC data/research confirms Americans' lack of sleep: causes

## **Market Size & Growth**

**47-52**

- Market Definition & Scope: the markets comprising total sleep market
- Discussion of the historical growth of the market, performance during recessions
- Analysis of the market by McKinsey & Company
- Market size/growth/performance during 2019 and 2020 during the pandemic
- Marketdata outlook and forecast for 2021 & 2025
  
- The **Mattresses** Market
- The Sleep **Pillows** Market
- The **Insomnia Medications** Market
- The **Sleep Labs** Market
- The **Sleep Apnea Devices** Market
- The **Retail Sleep Aids** Market

### Tables

- Size of U.S. sleep market, by segment: 1995-2025 F (mattresses, pillows, sleep lab operations, Rx/OTC sleeping pills, CPAP devices, retail devices & services)
- Total U.S. sleep market value, annual % change: 1995-2025 F
- Sleep pillows sales: 1995-2025 F
- Prescription & OTC retail anti-insomnia drugs sales: 2000-2025 F
- Sleep Labs revenues, no. of labs, annual % change: 1995-2025 F
- Sleep apnea devices (CPAPs) sales: total, ResMed. Respirationics: 1995-2025 F

## **Sleep Labs Market**

**53-91**

- What are sleep labs, how many?, evolution & nature of the field, polysomnograms test description, accredited vs. non-accredited centers
- Launching a new sleep lab – the process/key considerations, capital needed, choices for hospital or MD affiliations
- The effect of Medicare approval of home tests: discussion, type of devices
- What patients can expect at a sleep lab: type tests (PSGs, split night studies, MSLTs, CPAP titrations), role of sleep techs, follow-up
- How to find A sleep lab
- **Market Size & Growth:** 1995-2020 Estimates, Marketdata discussion/analysis of Mkt. performance in 2020, 2021 outlook & 2025 Forecast, estd. effect on revenues

- AASM COVID-19 PULSE SURVEY- major findings, impact of the pandemic on sleep labs
- EnsoData survey, impact of sleep labs
- Recent sleep lab metrics: 2017-2020 quarterly surveys of: trends in patient volume, bed Count, outlook for next year (Needham & Co. research reports)

### Tables

- Sleep Labs revenues, no. of labs, annual % change: 1995-2025 F

### Sleep Lab Technicians Salary Trends

- Descriptions of the major staff positions, training required (sleep tech, technologists)
- Findings of Sleep Review Magazine's salary survey, average salary and ranges for: RPSGTs, sleep techs, respiratory therapists, sleep physicians, sleep center directors, supervisors, managers: by tenure, by day/night shift, by age

### Table

- Salary by job title, by region: - 6 staff positions

### Results of Past Marketdata Sleep Labs Survey – Main Operating Metrics

- Type of sleep lab (percent of total: hospital-based, practice-based, university-based, independent / free-standing)
- Average number of PSGs (sleep studies, CPAP titrations and MSLTs) performed in 2006, 2007
- Average number of beds operated and average days/nights per week operated
- **Number of patients** the sleep lab would be able to test/titrate per week if operating at 100% occupancy, 7 days/nights per week (average)
- Avg. fees, avg. annual revenues per lab
- Sex, age of typical clients, type disorders treated
- List of Sleep centers' **biggest issues** or problems

Competitor Profiles (description and history of company, no. of labs operated, address, specialties, acquisitions, services, financials when available)

- **SleepMed, Inc. (incl. Novasom)**
- **Sleep Holdings**
- **Foundation Surgery Affiliates, LLC**
- **MedBridge Healthcare (SleepWorks, Sleep Services of America, PDS)**

### Sleep Medications Market

**92-109**

- Summary: discussion of number of prescriptions written, mkt. potential, prime drivers of mkt. demand
- Hurdle to overcome: past negative image of sleeping pills, long-term use, FDA fears vs. drug company efforts
- Reasons for dollar value decline of prescription insomnia drugs market, patent expiration, Emergence of generics
- Advertising drives consumer demand: amount spent advertising the top 3 brands,

## Sanofi's success with Ambien

- New meds: Belsomra, Dayvigo
- FDA approval status, setbacks for **Indiplon** (Neurocrine Biosciences) and **Gaboxadol** (Merck)
- Description of the major Rx sleeping Pill Brands (Ambien, Lunesta, Rozerem, benzodiazepines, melatonin receptors, antidepressants)
- OTC Retail Sleeping Pills: discussion
- **Market Size** - A Mature Market: sales of major brands, 2020 performance, 2025 Forecast, rationale for future growth.
- Recent sales of Belsomra, Zolpidem, Lunesta
- Discussion of the OTC sleep supplements market and why it's growing faster than Rx Insomnia drugs

### Tables:

- sales of prescription and retail anti-insomnia drugs: 2000-2025 forecast
- Prescription vs. OTC Insomnia Drugs/Sleep Aids Market: 2016-2021
- U.S. Sales of Top 10 OTC Retail Brands of Sleep Aid Tablets: 2016, 2020
- sales of prescription anti-insomnia drugs, by brand
- sales of Ambien, Ambien CR: 1998-2088 (in Euros and dollars)

## **Sleep Apnea Devices Market**

**110-129**

- Summary - Background of Sleep Disordered Breathing: mkt. penetration in U.S. vs. abroad, estimates of mkt. size by industry analysts/competitors
- Product Definitions: **CPAPs** (continuous positive airway pressure devices), types of masks & mouthpieces used
- Market Trends: the home test mkt., comments by Wachovia analysts regarding potential in view of CMS ruling, move to smaller devices
- **Market Size**: effects of CMS ruling, estimates of growth rates in U.S. vs. Globally, positive/negative factors affecting the market
- **2020 Market Performance During The Pandemic**
- **2021 Outlook by ResMed, Needham & Co., Marketdata**, other research firms, U.S. vs. global market growth
- The Major Respiratory Equipment Device Competitors: address list.

Competitor Profiles (company descriptions, divisions, specializations, 2015-2020 revenues, outlooks)

- Resmed
- Respirationics

### Tables

- Sleep apnea devices (CPAPs) sales: total, ResMed. Respirationics, other companies: 1995-2025 F

## **The Mattress & Pillows Market**

**130-157**

- Summary & Status of the market: a steady replacement business, new technology and sales/distribution outlets, e-commerce, bedding retailers disruption.
- **Market Size & Growth**: 2019-2020 performance during pandemic, ISPA industry wholesale shipments, 2020 outlook by ISPA
- Differences in mfg. technologies used by the major mfrs., visco, latex

- List and sales of top 5 bedding retailers
- The Ultra-premium mattress market: growth rate, % of sales

Competitor Profiles (company description, capabilities, specialties, historical revenues, mergers, mkt. share, distribution, outlooks, recent financials to 2020 if avail., etc.)

- **Tempur Sealy Intl.**
- **Sleep Number (formerly: Select Comfort)**
- **Simmons Serta**
- **Casper**

#### The Sleep Pillows Market

- Discussion of new pillow designs, materials, pricing, mkt. trends
- The Sona pillow, MyPillow company profile
- Estimated retail market size: 1997-2025 F

#### Tables

- U.S. WHOLESALE sales of mattresses & foundations, % change, **units**: 1987-2020
- U.S. Wholesale sales of mattresses & foundations, % change, **dollars**: 1987-2020
- Non-innerspring mattress unit and dollar shipments
- Estimated RETAIL sales of mattresses: 1987-2025 F
- Personal consumption expenditures for furniture & bedding: 1987-2019

#### **Retail Sleep Devices Market**

**158-173**

- Summary & discussion
- **Sleep Lamps/Light Therapy Market**: use for seasonal affective disorder, dawn simulation, evolution of "light boxes", mkt. status & leading mfrs., mkt. size, list of 9 major competitors, Company Profile: Apollo Health
- **Sound Machines/White Noise Machines Market**: use and technology, applications, history of development, emergence of Marpac as industry leader, list of catalog retailers selling machines (Brookstone, Hammacher Schlemmer, etc.), market size/growth.
- **Eye Shades and Sleep Masks**: leading competitors (Dream Essentials)
- **Earplugs Market**: mkt. size, leading mfrs./distributors/retailers
- **Sleep Pods**: Yelo & MetroNaps sleep lounges appearing in metro markets
- **Sleep/Insomnia Books Market**: list of titles
- **Sleep apps** for smartphones, leading apps

#### **Reference Directory of Sleep-related Trade Groups, Experts, Journals**

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- List of sleep market national/regional trade associations, journals, consulting firms, brokerage analysts, other key contacts – address & phones, description of activities.
- Profiles of Michael J. Breus, Ph.D. and Duane M. Johnson, Ph.D.

