

F R O S T & S U L L I V A N

2024 COMPANY OF THE YEAR

*IN THE GLOBAL
RESPIRATORY CARE
DEVICES INDUSTRY*

Dräger

F R O S T & S U L L I V A N

BEST
2024 PRACTICES
AWARD

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Draeger excels in many of the criteria in the respiratory care devices space.

AWARD CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Mega Trends	Customer Purchase Experience
Implementation of Best Practices	Customer Ownership Experience
Leadership Focus	Customer Service Experience
Financial Performance	Brand Equity

Addressing Hospital Needs by Offering Easy-to-use and Cost-conscious Solutions

Draeger, headquartered in Germany, was founded in 1889 by J. Heinrich Dräger and Carl Adolf Gerling. Draeger offers medical and safety solutions, operates in approximately 50 countries, and has a presence in over 190 countries worldwide.¹ In line with its philosophy of ‘Technology for Life,’ Draeger is committed to offering innovative, technologically advanced respiratory care solutions.

In 2023, Draeger received US Food and Drug Administration (FDA) 510(k) clearance for its Evita V600,

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**- Utkarsha Soundankar
Senior Research Analyst**

V800, and Babylog VN800.² The company developed these solutions based on customers’ requirement to improve patient safety, patient outcome, and hospital workflow. The new ventilators have user friendly menus with large icons, with important functions at the top, color-coordinated screen design, low color numbers for screen elements, and reduced use of signal colors, enabling smooth navigation for clinicians. These new ventilators can provide various

modes of ventilation, such as high-flow O2 therapy, non-invasive, and invasive ventilation modes that use the same device and accessories. This solution avoids using multiple devices near critically ill patients who

¹ Dräger; “[Dräger at a glance](#)”

² Dräger; Press Release; July 12, 2023; “[Dräger Secures FDA 510\(k\) Clearance for Evita V600, V800 and Babylog VN800 Ventilators](#)”

require different types of respiratory support, thereby streamlining clinicians' workflow and reducing costs for different equipment.

Infection management is one of the important criteria for critical care units in hospitals, and Draeger's new ventilators have a rounded design with few edges and overhangs and can be effectively disinfected. Draeger developed its ventilation solutions based on its 100 years of experience in ventilation technology, effectively solving multiple challenges that hospitals have faced over the years, such as multiple device requirement, infection control, and difficult device navigation.

Ten percent of patients admitted in the ICU suffer from acute respiratory distress syndrome (ARDS), which can be caused from ventilator-associated lung injuries.³ To prevent this problem, Draeger's ventilators, including Evita, Babylog, and Savina 300-Select, are available with airway pressure release ventilation (APRV) to aid spontaneous breathing at any time under continuous positive airway pressure. APRV improves oxygenation, facilitates spontaneous breathing, and prevents lung complications. Moreover, AutoRelease is a function available in the Evita and Babylog ventilators, wherein the duration of the pressure release is determined by the expiratory flow tracing when AutoRelease is active.

In addition, Draeger offers the PulmoVista 500, an electrical impedance tomography (EIT) that visualizes regional air distribution within the lungs. Instead of obtaining a CAT scan or an x-ray that shows results in a single point of time, PulmoVista shows lung ventilation in real time, non-invasively, and at the patient's bedside. PulmoVista can monitor regional ventilation for up to 24 hours through a flexible silicone belt, with 16 integrated electrodes that are placed around the patient's chest. PulmoVista 500 offers valuable patient information, including impedance waveforms, trend views on ventilation distribution, and changes of end expiratory lung volume. The solution enables the analysis of ventilation distribution, regional compliance changes, and delays in regional ventilation and is available in Canada, China, Japan, Europe, and South America. The PulmoVista 500 is not commercially available in the United States



Image Provided by Draeger

With Draeger's innovative and customer-centric solutions, Frost & Sullivan has recognized the company in the ventilator and neonatal care industry in 2014, 2017, 2020, and 2022.

Visionary Scenario through Mega Trends

Draeger provides first-to-market solutions and continually invests in the development of new technologies. One example of this investment in new research is Draeger's collaboration with STIMIT for the investigation of ventilator-induced diaphragmatic dystrophy (VIDD).⁴

During mechanical ventilation, patients can have impaired diaphragm activity, and 50% of the muscle fibers can be lost during the first 18 to 69 hours of ventilation. STIMIT is developing non-invasive

³ Draeger; "[Airway Pressure Release Ventilation](#)"

⁴ STIMIT AG; "[Company Mission: Empower Patients to Breathe](#)"

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solutions are clinically validated, with detailed consideration for end-user application and high quality. To serve existing customers and assist new customers, the company offers best-in-class services and consumables. Draeger has over 3,000 qualified service technicians globally and offers its services remotely as well.⁵ For consumables, the company offers value-added functionalities, such as single-patient use or reusable valves to meet customers’ infection control requirements.

“The technology and clinical education has been essential to further patient care and improve overall performance.”

- Felix K, Respiratory Therapist, New York

The company’s representatives, including sales representatives, customer service, clinical support, and leadership, offer exceptional support during transportation and new equipment installs, in addition to clinical bedside support. Customers appreciate Draeger’s exceptional clinical and technological training to improve clinicians’ performance. During the COVID-19 pandemic, Draeger undertook multiple programs to support hospitals in additional respiratory equipment installations and training. Draeger has become one of the leading respiratory device vendors for its enhanced clinical outcomes, product quality, long-term customer support, and ongoing education tools, all of which assist in offering patient safety and enhanced care.

Holistic Customer Service Experience

Draeger provides customers with exceptional service programs based on the needs of each healthcare facility. The company offers a robust service program that ranges from 2 to 5 years of service coverage for its devices. Draeger has 24/7 hotline support and an online portal for its products and has shown exceptional service follow up. Additionally, the company offers webinars and training classes for healthcare facilities that want to manage their own programs.

With its broad portfolio of products and services in the critical care and acute care categories, Draeger can effectively offer a holistic approach to healthcare facilities. Draeger offers synergistic products that can meet hospitals’ needs in critical care and neonatal intensive care units and offers the most advanced technologies, exceptional customer support teams, and extensive clinician training, thereby providing a more holistic approach compared to its competitors. Moreover, all of Draeger’s devices have a common

diaphragm stimulation for re-activating diaphragm activity. The US FDA-approved clinical trial for the non-invasive approach of stimulating the diaphragm during mechanical ventilation to preserve diaphragm thickness began in January 2024.

Excellent Customer Ownership Experience

With its outstanding reputation over the years for respiratory devices, such as ventilators, Draeger has acquired multiple customers globally. Draeger’s

⁵ Drägerwerk AG & Co. KGaA; July 2023, Lübeck; [“Capital Markets Presentation”](#)

user interface, making it easier for clinicians to operate and manage the systems.

University of Health Kansas City at Truman Medical and MountainView Hospital are two examples where Draeger's devices have optimized a family centric NICU. Draeger puts significant effort in providing its employees with internal training to offer exceptional customer service. At the American Association for Respiratory Care (AARC) Congress 2023 in Nashville, Draeger received their 12th AARC Zenith Award for best-in-class service.

Brand Equity and Leadership Focus

Draeger has a strong leadership team and a customer-centric, innovative focus. Draeger offers adult respiratory devices and advanced and innovative neonatal respiratory solutions. In 2023, Vizient, Inc. named Draeger as the Pediatric Program Excellence Supplier of the Year for its performance and commitment to improve pediatric outcomes and cost savings.

Draeger has donated more than 150 respiratory devices to respiratory schools to train the next generation of therapists. In 2024, Draeger will be donating another 185 ventilators in the United States.

Draeger started 'A Breath Ahead,' which a respiratory care online education program that covers contemporary clinical topics for customers and all respiratory therapists.⁶ This program has 15 topics on adult ventilation and 17 topics on neonatal ventilation, with 397,035 course completions since 2012. Although many competitors offer training courses, Draeger is one of the first to introduce the same and offer AARC-accredited continuing respiratory care education (CRCE), which is conducted by experienced respiratory therapists and clinicians. These courses can offer \$400 in cost savings because they are free of charge, considering \$20 per hour for online AARC-accredited paid respiratory therapist courses. More than 145,000 respiratory care practitioners can benefit from this program.

Additionally, Draeger, in collaboration with ICON, offers best-in-class clinical support and webinars to the respiratory care community, with 112,662 clinicians completing the courses to meet their education needs and requirements for license renewals. In addition, the company supports research and education through academic work and attends conferences and events, such as American Association for Respiratory Care, Society of Critical Care Medicine, American Thoracic Society, and American College of Chest Physicians, to provide clinicians with awareness and education.

Conclusion

Draeger offers advanced ventilation and respiratory monitoring solutions for adult and neonatal care. With its critical and acute care devices, Draeger can meet hospitals' holistic needs, especially for critical care, intensive care, operating rooms, and neonatal care. The company offers customer-centric solutions by collaborating closely with respiratory therapists and clinicians.

Apart from providing advanced devices, Draeger offers high-quality consumables globally to support infection control, in addition to offering enhanced patient care. Moreover, Draeger offers reliable and fast customer service and support to meet customers' demands and to enhance customer satisfaction.

For its strong overall performance, Draeger is recognized with Frost & Sullivan's 2024 Global Company of the Year Award in the respiratory care devices industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Award is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Award Analysis

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed by a robust solution development process

Visionary Scenarios Through Mega Trends:

Long-range, macro-level scenarios are incorporated into the innovation strategy through the use of Mega Trends, thereby enabling first-to-market solutions and new growth opportunities

Leadership Focus: Company focuses on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate a consistent and repeatable level of success

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Engine™

Frost & Sullivan’s proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

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Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

