

## **Electronic Skin Patches Market - Global Outlook & Forecast 2022-2027**

Market Report | 2023-01-10 | 268 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global electronic skin patches market is expected to grow at a CAGR of 20.17% during 2022-2027.

### **MARKET INSIGHTS**

-□The significant factors contributing to the growth of the electronic skin patches market include the rise in the need for continuous monitoring of physiological parameters, growing penetration of wearable devices and mobile platforms for healthcare monitoring, development of innovative skin patches, high demand for remote patient monitoring, an emerging trend of digital tattoos, presence of supporting initiatives and reimbursement policies, and a growing number of start-ups developing electronic skin patches.

-□Electronic skin patches anchor a device on the patient's or user's skin to achieve a specific function. These patches are attached to a user's skin and incorporated with sensors, actuators, processors, and communication technology, which allow the device to connect to the internet and turn it smart. Several significant application areas are now profoundly impacting health and quality of life. In particular, cardiovascular monitoring and diabetes management has been growing exponentially to create billions of annual revenues.

-□Electronic skin patches are one of the latest waves in health monitoring; their non-intrusive design means they are comfortable and discrete. These patches include sweat, axillary temperature, motion, biopotential (TENS, EMS) patches, and devices across various sectors and product categories. In cardiovascular monitoring, these devices range from traditional ECG options and monitoring devices for inpatients and outpatients to specific products such as Holter monitors, mobile cardiac telemetry devices, and other event monitors.

### **MARKET TRENDS & OPPORTUNITIES**

#### **Growing Number of Start-ups and Rise in the Development of Innovative Skin Patches**

-□With the growing demand for technological innovations in the healthcare field, several start-ups are emerging to stay ahead of

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the technology curve to strengthen their competitive advantage in the electronic skin patches market. A few interesting start-ups and universities are working to bring advanced electronic skin sensor patches into the market. For instance, XSENSIO SA has developed next-generation wearable devices to track biochemical information on the wearer's skin surface. Scientists at the Georgia Institute of Technology have developed wireless wearable devices for measuring heart rate, electrocardiogram, respiratory rate, and motion activity. Some scientists have also developed a flexible, wearable patch detecting blood-alcohol levels from the user's sweat.

#### High Need for Constant Physiological Monitoring and Treatment for Hospitalized Patients

-□The growing burden of acute or chronic conditions has increased the need for continuous monitoring of both inpatients and outpatients. The major causes of death worldwide are due to heart diseases, cancers, diabetes, chronic lower respiratory syndrome, stroke, cerebrovascular diseases, viral infections, and others. Cardiovascular diseases are one of the leading causes of death worldwide, taking around 17.9 million lives each year. This increased the number of patients needing to constantly monitor heart rate, pulse rate, electrocardiogram, and other parameters related to the heart. The electronic skin patches market has emerged to monitor such physiological parameters for heart-related diseases and various other conditions.

#### Remote Patient Monitoring Driving the Adoption of Electronic Skin Patches

-□Remote patient monitoring uses innovative technology tools to collect and track patient data outside standard medical settings. With an increase in the prevalence of various diseases, many healthcare providers are shifting to implementing remote patient monitoring, especially in conditions such as elderly patients, pandemics, and others. The adoption of remote patient monitoring is increasing the use of electronic skin patches to transfer patient information directly to the healthcare provider or enter into the electronic medical records boosting the electronic skin patches market. Cardiology was one of the first therapy areas to introduce remote patient monitoring into standard practice. This sector streamlines doctor-hospital visits by remotely switching monitors between compact cardiac monitoring devices during the monitoring period.

#### Increase in Adoption of Healthcare Applications & Smart Wearables

-□Many users are increasingly adopting connected wearable medical devices due to their various advantages, such as continuous monitoring, prediction of health problems and providing alerts, a collection of detailed real-time longitudinal data, and helping educate and empower patients to take control of their health. These devices are being incorporated and connected to electronic skin patches, providing ease of use, and contributing to the growth of the global electronic skin patch market. Software applications in mobiles or smart watches are associated with these patches to send data directly and help monitor the users' health.

## SEGMENTATION ANALYSIS

### INSIGHTS BY APPLICATION

The global electronic skin patches market based on applications includes diabetes management, general patient monitoring, cardiovascular monitoring, and others. Diabetes management accounts for the highest share of 43.51% and is estimated to reach USD 18.10 billion by 2027 in the global market.

-□Diabetes Management: This includes electronic skin patches used to manage diabetes with continuous glucose monitoring and insulin pumps.

-□General Patient Monitoring: This includes electronic skin patches used to monitor various physiological parameters and majorly vitals such as temperature, heart rate, pulse rate, and respiratory rate.

-□Cardiovascular Monitoring: This includes electronic skin patches used in monitoring the activity of the heart by ECG, EKG, Holter monitoring, mobile cardiac telemetry, and ambulatory cardiac monitoring.

-□Others: This includes electronic skin patches used for various purposes such as cosmetics, sports, fitness & wellness, wound care, electrical stimulation, imaging, fetal monitoring, sleep tracking, stress, and pharmaceuticals.

#### Segmentation by Application

-□Home Care Settings

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- Hospitals
- Physician Offices & Specialty Clinics
- Others

## INSIGHTS BY END-USER

Based on the end-user, the global electronic skin patches market includes home care settings, hospitals, physician offices & specialty clinics, and others. In 2021, home care settings accounted for the global market's highest share of 42.80%.

- Home Care Settings: This includes home care providers and individuals using electronic skin patches to monitor and treat various conditions.
- Hospitals: This includes hospitals that use electronic skin patches for monitoring and treating various conditions.
- Physician Offices & Specialty Clinics: This includes physician offices & specialty clinics, diagnostic centers, sleep labs & clinics, and physiotherapy & rehabilitation centers that use electronic skin patches for monitoring and treating various conditions.
- Others: This includes cosmetic clinics, sports, health and wellness centers, pharma & biotech companies, ambulatory surgical centers, and academic & research institutes that use electronic skin patches for monitoring and treating various conditions.

### Segmentation by End-User

- Home Care Settings
- Hospitals
- Physician Offices & Specialty Clinics
- Others

## GEOGRAPHICAL OVERVIEW

North America accounts for the highest share of 47.59% in the global electronic skin patches market. North America is the major revenue contributor in the global market due to various factors involved in its growth that including the rising prevalence of cardiac disorders and diabetes, the presence of advanced healthcare infrastructure, a rise of wearable devices for healthcare monitoring, a surge in the use of IoT based applications, miniaturization of sensors used in medical devices, a growing trend for maintaining personal health and fitness, and growing demand for skin patches for drug delivery.

Further, the U.S. accounts for 94.11% of North America's electronic skin patches market share. The growing demand for electronic skin patches across the country is likely growing with the rise in chronic conditions such as cardiovascular diseases and diabetes, which require constant monitoring of various parameters such as heart rate, blood glucose levels, blood pressure, and others. Due to this, most patients are using electronic skin patches that help monitor various physiological factors. For instance, in the U.S., for every 36 seconds, a person dies from cardiovascular disease. The increasing prevalence of various diseases is a significant factor contributing to the growing adoption of remote monitoring devices.

Europe has the second largest revenue share compared to other regions owing to the highly sophisticated healthcare infrastructure and high adoption and awareness of the advantages of electronic skin patches over conventional monitoring options. APAC is likely to be an emerging region in the global electronic skin patches market, with most people focusing on maintaining their physical health and continuously monitoring their physiological parameters. Latin America, the Middle East & Africa accounted for minimal shares in the global electronic skin patches market.

### Segmentation by Geography

- APAC
  - o□China
  - o□Japan
  - o□India

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- o Mexico
- o Argentina
- Middle East & Africa
- o Turkey
- o Saudi Arabia
- o South Africa

## COMPETITIVE LANDSCAPE

The competitive landscape in the global electronic skin patch market is currently intensifying due to the rapidly changing technological environment in the healthcare industry. Vendors operating the market are pursuing various strategies to provide the impetus for growth over the next few years.

These market participants adopt collaboration, partnerships, mergers, acquisitions, product launches, and other strategies. For instance, Philips acquired BioTelemetry, a leading player in the mobile cardiac telemetry market, in February 2021.

Large medical device companies are adopting an acquisition strategy to invest or partner with many emerging vendors to diversify their product portfolio and strengthen their presence in the overall market. For instance, iRhythm Technologies deployed ZioAT and ZioXT virtual platforms to help doctors treat a patient's heart using telemetry during the COVID-19 pandemic in April 2020.

The global electronic skin patches market is likely to get highly dynamic with the presence of major international, regional, and a handful of local vendors offering electronic skin patches. Abbott, Dexcom, General Electric Company, and Koninklijke Philips are vendors that contributed to a major share of the global electronic skin patches market.

### Key Vendors

- Abbott
- Dexcom
- General Electric Company
- Koninklijke Philips N.V.

### Other Prominent Vendors

- Menarini Diagnostics
- Bardy Diagnostics
- Benware Medical

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- Medidata
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- Medtrum Technologies
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- Nemauro Medical
- OMRON Healthcare
- Onera Technologies B.V.
- PAINMASTER
- QT Medical
- Quad Industries
- Smith+Nephew
- SpotSee
- The Surgical Company
- Theranica Bio-Electronics
- The Scott Fetzer Company
- Virility Medical
- VitalConnect
- VivaLNK
- Vivomi
- WearOptimo
- Xsensio

#### KEY QUESTIONS ANSWERED

- 1.□What is the expected growth of the global electronic skin patches market?
- 2.□What is the growth rate of the global electronic skin patches market?
- 3.□What are the latest trends in the global electronic skin patches market?
- 4.□Who are the key players in the global electronic skin patches market?
- 5.□Which region dominates the global electronic skin patches market share?

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##### 25.2.2 EUROPE: END-USER SEGMENTATION

##### 25.2.3 APAC: END-USER SEGMENTATION

##### 25.2.4 LATIN AMERICA: END-USER SEGMENTATION

##### 25.2.5 MIDDLE EAST & AFRICA: END-USER SEGMENTATION

#### 25.3 MARKET BY GEOGRAPHY

##### 25.3.1 DIABETES MANAGEMENT: GEOGRAPHY SEGMENTATION

##### 25.3.2 GENERAL PATIENT MONITORING: GEOGRAPHY SEGMENTATION

##### 25.3.3 CARDIOVASCULAR MONITORING: GEOGRAPHY SEGMENTATION

##### 25.3.4 OTHERS APPLICATIONS: GEOGRAPHY SEGMENTATION

##### 25.3.5 HOME CARE SETTINGS: GEOGRAPHY SEGMENTATION

##### 25.3.6 HOSPITALS: GEOGRAPHY SEGMENTATION

##### 25.3.7 PHYSICIAN OFFICES & SPECIALTY CLINICS: GEOGRAPHY SEGMENTATION

##### 25.3.8 OTHER END-USERS: GEOGRAPHY SEGMENTATION

### 26 APPENDIX

#### 26.1 ABBREVIATIONS

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