

South Africa Patient Monitoring Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The South African patient monitoring market is expected to register a CAGR of 5.5% in the forecast period. Globally, the COVID-19 pandemic put immense strain on healthcare systems and hospitals, as most medical facilities were understaffed and overworked. Patient monitoring technologies, such as ventilators, aided in monitoring critically ill COVID-19 patients, allowing measures of physiological reserves and indications of therapeutic intervention success during the pandemic, resulting in a favorable market impact.

Key Highlights

COVID-19 raised the demand for patient monitoring in the South African region due to limiting patients' hospital visits. As per an article by World Health Organization published in July 2022, due to an increase in COVID cases, hospitalizations and deaths have increased by 90% to 100% in the last two years. Thus, during the pandemic, emergency admissions in hospitals were increased, and intensive care was provided to patients, which resulted in an increase in the use of patient monitoring devices during COVID-19. However, since the restrictions were lifted, the industry has been recovering well. Over the last two years, the market recovery has been led by the high prevalence of chronic diseases.

Patient monitoring devices are used to measure certain medical parameters by continuously measuring vital signs and/or repeatedly performing medical tests to ensure the well-being of the patient. In South Africa, chronic diseases like cardiovascular diseases are increasing. According to Globocan 2020, prevalent cancer cases were 262,455 in 2020. Further, the same report projected that the number of cancer cases will reach 175,102 by 2040. With this rising prevalence of cancer in the country, the demand for patient monitoring devices is expected to increase and thus expected to drive the growth of the studied market. In addition, according to International Diabetes Federation, in November 2021, the highest rate of diabetes prevalence in Africa was recorded in South Africa, at 11.3% in 2020. Thus, the growing prevalence of diabetes in the country is likely to support the growth of the market.

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Thus, all the above-mentioned factors, such as the rising prevalence of chronic diseases, are expected to boost the market in the country. However, the high cost of technology may restrain the market growth over the forecast period.

South Africa Patient Monitoring Market Trends

Application in Cardiology Expected to Dominate the Growth of the Market

Cardiac monitoring refers to continuous or intermittent monitoring of heart activity with an assessment of the patient's condition relative to their cardiac rhythm. Additional monitoring components allow cardiovascular pressures and cardiac output to be monitored and displayed as required for patient diagnosis and treatment. Continuous cardiovascular and pulmonary monitoring allows for prompt identification and initiation of treatment. In the recent decade, the incidence of cardiovascular diseases (CVD) in South Africa has increased.

According to the study published in British Medical Journal in February 2022, hypertension affects 8.22 million South African people who do not have private health insurance. According to estimates, hypertension yearly causes 14,000 cases of ischemic heart disease, 13,300 strokes, and 6,100 cases of chronic renal disease. Thus, the high incidence of heart disease has increased the demand for patient cardiac monitoring devices, which is driving the overall market growth.

Moreover, cardiac diseases are more prevalent in the geriatric population, which is likely to support segment growth. For instance, according to the 2022 statistics published by the United Nations Population Fund, in South Africa, a large proportion of the living population is aged 15-64 and accounts for 66% in 2022. In addition, according to the same source, 6% of the population will be 65 years and above in 2022.

Thus, all aforementioned factors, such as the growing prevalence of cardiac diseases and the aging population, are expected to boost segment growth over the forecast period.

Fetal and Neonatal Expected to Hold a Significant Market Share During the Forecast Period

Fetal and neonatal monitoring devices are machines that are used to monitor and care for the special needs of unborn and newborn babies. Fetal monitoring devices are important equipment used in gynecology and obstetrics treatments to check on the health of the fetus during labor and delivery. In neonatal intensive care units (NICUs), where complex machinery and monitoring devices are designed for the special demands of newborn babies, neonatal gadgets are frequently utilized.

The fetal and neonatal monitoring systems can monitor all parameters, including electrocardiogram (ECG), respiration rate, heart rate, blood pressure, peripheral capillary oxygen saturation (SpO2), and body temperature. Neonatal monitoring instruments are used in neonatal intensive care units (NICU), emergency departments and rooms, and operating theaters at all levels of hospitals for continuous monitoring of neonates and infants.

According to the study published in September 2021 in Dovepress Journal, South Africa was likewise dealing with a rising rate of preterm birth, with 59% occurring primarily at community health centers and district hospitals by 2020. Thus, the growing burden of preterm birth in the country is expected to raise in demand for fetal and neonatal monitoring devices in the country.

Additionally, various initiatives taken by the market players are expected to support market growth over the forecast period. For instance, in October 2021, Abdul Latif Jameel Health, through their Japanese trading corporation, announced a new collaboration to address the lack of access to adequate fetal monitoring in Africa, where there are unmet needs due to a lack of medical facilities and maternity physicians, or where populations are geographically dispersed and cannot easily access primary health care. The agreement entails Melody International signing a memorandum of understanding (MoU) for the exclusive distribution of a cloud-based mobile wireless fetal monitor platform.

Thus, all aforementioned factors, such as rising preterm birth and strategic initiatives by market players, are expected to boost

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the segment over the forecast period.

South Africa Patient Monitoring Market Competitor Analysis

The South African patient monitoring market is consolidated with the presence of a large number of players. The companies are implementing certain strategic initiatives, such as mergers, new product launches, acquisitions, and partnerships, that help strengthen their market positions. Some of the market players in the market are General Electric Company (GE Healthcare), Abbott Laboratories, Becton, Dickinson and Company, Johnson & Johnson, and others.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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