

France Patient Monitoring - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 78 pages | Mordor Intelligence

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Report description:

The France Patient Monitoring Market size is estimated at USD 2.32 billion in 2024, and is expected to reach USD 3.42 billion by 2029, growing at a CAGR of 8.01% during the forecast period (2024-2029).

The COVID-19 pandemic significantly impacted market growth. The demand for wearable devices and patient monitoring devices has increased during the pandemic period as they allow contactless communication and tracking of medical conditions by clinicians. The spread and early diagnosis of COVID-19 can be determined through the remote monitoring of vital signs such as skin and body temperature, respiratory rate, pulse rate, heart rate, and blood oxygen level, which are related to COVID-19. This is anticipated to have a positive effect on the growth of the studied market. For instance, an article published in the European Journal of Digital Health in September 2021 observed that the adoption of multiparametric remote monitoring systems increased in the country during the pandemic, and the patients were equipped with these systems, which included either a tablet or smartphone connected via Bluetooth to a body weight scale and a blood pressure monitor. Moreover, the rising company activities for developing technologically advanced products and increasing product launches and approvals in the country have increased its adoption among consumers. For instance, in April 2022, Schiller France launched an MRI-compatible patient monitoring platform, MAGLIFE RT-1, that allows the close monitoring of the patients, including adults, children, and neonates, during the examination and can be fully controlled from outside through MAGSCREEN RT-1. Thus, with such developments, the studied market is expected to regain its full potential in the coming three to four years.

Factors such as the rising burden of chronic diseases and technological advancements in the products are boosting market growth. For instance, according to GLOBOCAN 2020 report, about 579,388 new cancer cases are expected to be diagnosed in France by 2040. Thus, the expected increase in the number of people suffering from cancer is expected to create demand for remote patient monitoring devices, thereby propelling the market growth. Also, according to the study published in PLOS One in

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January 2021 in France, there were 2.6 million people with chronic obstructive pulmonary disease (COPD), and by 2025, that number is expected to rise to 2.8 million.

The rising population in the country is likely to contract various chronic diseases such as cancer, cardiovascular diseases, diabetes, hypertension, respiratory changes, and other diseases due to lifestyle changes as well as environmental changes. This is expected to increase the adoption of monitoring devices to regularly monitor their condition and status, thereby propelling the growth of the studied market. For instance, according to the 2022 statistics published by UNPF, about 61% of the population living in France was aged between 15-64 years this year. In addition, as per the same source, about 21% of the population was aged 65 years.

The growing government initiatives on digitalization will lead to the development of technologically advanced patient monitoring devices, which in turn is anticipated to fuel the market growth. For instance, in October 2021, the Government of France invested EUR 650 million (USD 690 million) to accelerate the national digital health strategy as part of the Health Innovation 2030 plan. Such initiatives will provide digital patient monitoring device manufacturers a boost, resulting in the introduction of innovative patient monitoring products, thereby propelling the market growth.

Furthermore, the rising company activities in developing advanced patient monitoring devices are also contributing to the market growth. For instance, in November 2022, BIOSENCY signed a partnership with RestMed to expand its development in France. Under this partnership, RestMed distributes BIOSENCY's Bora-Care, a telemonitoring device for homecare patients with respiratory insufficiency, in France. Therefore, owing to the aforementioned factors, the studied market is expected to grow over the forecast period. However, the high cost of technology is likely to impede the growth of the patient monitoring devices market in France over the forecast period.

France Patient Monitoring Market Trends

The Neurology Segment is Expected to Show a Healthy Growth in the France Patient Monitoring Market Over the Forecast Period

The neurology segment is expected to witness significant growth in the patient monitoring market over the forecast period owing to the factors such as the rising prevalence of neurological disorders such as Parkinson's, Alzheimer's, dementia, and others, the need for neurological conditions to regularly monitor, and growing company activities in developing monitoring devices that help in monitoring the brain activity.

The rising burden of neurological diseases among the population is the key factor driving the demand for neuromonitoring devices. For instance, according to the Alzheimer's Association 2022, more than 1,175,000 people were living with Alzheimer's disease in 2021, and an estimated 200,000 people are diagnosed with Alzheimer's or another dementia each year in France. Thus, a high number of Alzheimer's patients in France is expected to increase the adoption of patient monitoring devices to track neurological disease conditions, hence propelling the segment's growth.

Furthermore, the increasing product launches in the country increase the availability of neuromonitoring devices in the market, which is expected to boost segment growth. For instance, in March 2022, Braintale, a French MedTech, launched the brainTale-care platform with its modules brainQuant, dedicated to white matter quantification and brainScore-coma, offering the prediction of coma recovery. This launch offers neurologists and resuscitators innovative, non-invasive, clinically verified solutions to enhance the diagnosis, monitoring, and prognosis of the progression of neurological diseases and disorders, greatly influencing the decision-making process to optimize patient treatment.

Moreover, the increasing adoption of various key business strategies among the companies, such as partnerships, agreements, and others, is expected to increase the adoption of patient monitoring devices in the hospital's neurology department, thereby

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boosting segment growth. For instance, in January 2021, Royal Philips entered a five-year technology and innovation partnership with France-based Rennes University Hospital supporting diagnostic, interventional imaging, and patient monitoring and management. This will help in enhancing clinical pathways and patient experience, particularly for neuro-radiology departments and intensive care units.

Therefore, owing to the factors such as the high burden of neurological diseases, rising company activities, and increasing product launches, the studied segment is expected to grow over the forecast period.

The Cardiology Segment is Expected to Have the Significant Market Share Over the Forecast Period

The cardiology segment is expected to witness a significant market share in the patient monitoring market in France over the forecast period owing to the factors such as the rising burden of cardiovascular disease, its risk-associated factors, and the growing adoption of cardiac monitoring devices. Cardiac monitoring refers to continuous or intermittent monitoring of heart activity with the 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.

The rising prevalence of hypertension, stroke, diabetes, obesity and other cardiovascular diseases is the key factor driving the demand for cardiac patient monitoring equipment, hence bolstering segment growth. For instance, an article published in Dovepress in January 2022 observed that the incidence of myocardial infarction among the population living in France was expected to double by 2035. In addition, younger women are more expected to suffer from MI than men. Thus, the expected increase in the population suffering from heart diseases is anticipated to fuel the demand for cardiac monitoring devices to further reduces the risk of heart failure, hence propelling the segment growth.

Additionally, according to an article published in PLOS One in June 2021, obesity was considered a significant public health problem in France as it is a risk factor for chronic diseases, such as diabetes and hypertension, etc., which in turn has substantial psychological and social consequences. Thus, the increasing burden of obesity is likely to develop various heart diseases and may lead to the accumulation of lipids in the arteries, decreased cardiac rhythms, and other problems. This is anticipated to increase the demand for regular monitoring of the heart condition, hence bolstering segment growth.

Moreover, the rising product launches for monitoring as well as early detection of heart conditions are also expected to bolster market growth. For instance, in September 2021, Withing launched a cardiac monitoring smartwatch, ScanWatch Horizon, in France, which includes a slew of heart-health monitoring features such as heart rate, ECG, breathing disturbances, blood oxygen levels, sleep, and physical activity tracking. This watch enables the patient to identify heart rhythms, as well as the ECG feature to help detect atrial fibrillation.

Therefore, owing to the factors such as the rising burden of obesity, diabetes, and cardiovascular diseases and increasing product launches, the studied segment is expected to grow over the forecast period.

France Patient Monitoring Industry Overview

The France patient monitoring market is competitive in nature. Some of the major players in the France Patient Monitoring market include Draegerwerk AG, GE Healthcare, Koninklijke Philips NV, Kalstein France, Medtronic PLC, Kaptalia, Hill Rom Holdings (Welch Allyn), Siemens Healthineers, and Beckton, Dickinson & Company.

Additional Benefits:

 The market estimate (ME) sheet in Excel format

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