Middle East and Africa Patient Monitoring - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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Report description:

The Middle East and Africa Patient Monitoring Market size is estimated at USD 2.20 billion in 2024, and is expected to reach USD 2.91 billion by 2029, growing at a CAGR of 5.80% during the forecast period (2024-2029).

COVID-19 is expected to have a significant impact on the growth of the market. COVID-19 increased the demand for patient monitoring in the Middle East and Africa region owing to the restriction of patients' visits to the hospital. Government organizations provided various services to help monitor the condition of patients infected with COVID-19. For instance, in April 2020 the Saudi Ministry of Health launched an app aimed at monitoring the conditions of people suspected of having Coronavirus disease (COVID-19). Such government initiatives provided to monitor the condition of patients contributed to the growth of the market during the pandemic period. Also, during the post-pandemic period, the increasing adoption of patient monitoring in the Middle East and Africa region is expected to contribute to the growth of the market.

The key factors propelling the growth of the market are the rising burden of chronic diseases due to lifestyle changes, growth in the geriatric population, growing preference for home and remote monitoring, and ease of use and portability devices to promote growth. According to GLOBOCAN 2020, it was estimated that around 27,885 new cancer cases were reported in Saudi Arabia in 2020. Similarly, it was estimated that around 4,807 new cancer cases in the United Arab Emirates (UAE) and 3,842 new cancer cases were reported in Kuwait in 2020, respectively. With the high burden of cancer in the country, demand for effective treatment procedures also increases. This is ultimately helping in driving the biologics market growth in the GCC region. Also, according to the United Nations Population Fund's World Population Dashboard's Statistics 2021, in Kuwait, approximately 3.4% of the population of the country is aged 65 years and above. In addition, as per the World Population Ageing 2020 Report, in the United Arab Emirates, the population aged 60 years or above (thousands) in 2019 was 113 and the number is estimated to reach 1,679 by the year 2050. As the geriatric population is prone to suffer from various chronic diseases such as cardiovascular diseases, hypertension, diabetes, and others, are anticipated increase in population is expected to fuel the demand for the patient monitoring market.

Patient monitoring technologies identify small changes in the patient's physiological data, hence promoting self-monitoring. Thus, it reduces readmissions and prevents avoidable hospitalizations, decreases the number of unnecessary trips to the doctor's office, and reduces travel-related expenses. On a short- and long-term basis, by the proper implementation, patient monitoring technologies can expand access to quality healthcare and save time and money.

Thus the above-mentioned factors are expected to drive the demand for the growth of the market during the forecast period.

MEA Patient Monitoring Market Trends

Hemodynamic Monitoring Devices Segment is Expected to Grow Fastest Over the Forecast Period

The key factors propelling the growth of this market are an increase in the number of critically ill geriatric cases, a rise in the prevalence of cardiac disorders and diabetes, and increasing demand for home-based and non-invasive monitoring systems. With the increasing prevalence of cardiovascular diseases and other chronic diseases in the region, market growth also increases. As per the International Diabetes Federation 10th Edition 2021, 803.4 (in 1,000s) people were suffering from diabetes in 2021 in Kuwait, and the number is estimated to reach 1,051.4 (in 1,000s) by the year 2030 and 1,267.4 by 2050. Similarly, per the same source, 990.9 (in 1,000s) people were suffering from diabetes in 2021 in the United Arab Emirates and the number is estimated to reach 1,177.5 (in 1,000s) by the year 2030 and 1,325.8 by 2050. Thus, with the increasing burden of diabetes, the demand for healthcare management apps for managing and controlling diabetes is increasing which is expected to fuel the market growth. Also, in The study 'Identifying co-occurrence and clustering of chronic diseases using latent class analysis: cross-sectional findings from SAGE South Africa Wave 2' published in January 2021, the prevalence of coexistence of two or more non-communicable diseases (NCDs) was 21% in the significantly high country. Thus, the growing burden of chronic diseases in the country is expected to increase the demand for hemodynamic monitoring devices.

Factors such as technological advancements in hemodynamic monitoring systems, increasing research into hemodynamic monitoring systems further boost the market.

South Africa is Expected to Dominate the Middle East and Africa Patient Monitoring Market Over the Forecast Period

South Africa is expected to dominate the market during the forecast period due to the increasing demand for patient monitoring as there was a rise in the geriatric population and the prevalence of chronic diseases.

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, as per the same source, 6% of the population is aged 65 years and above in 2022.

Also, according to International Diabetes Federation, in November 2021, titled 'With 1 in 9 adults living with diabetes, South Africa has highest diabetes prevalence in Africa', the highest rate of diabetes prevalence in Africa has been recorded in South Africa, at 11.3% in 2020.

Thus, the rising geriatric populations are more prone to develop chronic diseases which require proper monitoring and diagnosis which is expected to increase the adoption of patient monitoring.

MEA Patient Monitoring Industry Overview

The Middle East and Africa Patient Monitoring Market is s highly competitive and consists of a few major players. Companies, like Abbott Laboratories, Boston Scientific Corporation, Becton, Dickinson and Company, General Electric Company (GE Healthcare), Johnson & Johnson, and Medtronic Care Management Services LLCamong others, hold substantial shares in the market.

Additional Benefits:

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

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