

## **Saudi Arabia Patient Monitoring - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029**

Market Report | 2024-02-17 | 72 pages | Mordor Intelligence

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### **Report description:**

The Saudi Arabia Patient Monitoring Market size is estimated at USD 222.21 million in 2024, and is expected to reach USD 291.67 million by 2029, growing at a CAGR of 5.59% during the forecast period (2024-2029).

The outbreak of COVID-19 impacted the market, and increased the risk of many diseases such as respiratory diseases, cardiovascular diseases, and other chronic diseases owing to which the demand for patient monitoring devices significantly increased during the initial phases of the pandemic. For instance, according to the NCBI research study published in April 2021, patients infected with COVID-19 were highly prevalent to cardiovascular diseases. The major risk factor associated with these diseases in COVID-19 patients were pneumonia and increased length of stay in the hospital. This study suggested that COVID-19 patients were at higher risk of cardiovascular diseases which propelled the demand for patient monitoring devices. Remote patient monitoring using implantable cardiac devices is a safe alternative to in-person-only visits which led to enhanced patient satisfaction and improved clinical outcomes. Therefore, the demand and use of patient monitoring devices increased drastically during the initial phase of the pandemic. Although, with the declining cases of COVID-19 the demand slightly decreased in the later times of the pandemic. The positive developments and increasing cases of chronic diseases are anticipated to propel the market growth over the forecast period.

The rising incidences of chronic diseases, growth in the geriatric population, and growing preference for home and remote monitoring are the major factors driving the market growth. For instance, as per the research study published in August 2021, the prevalence of dementia in Saudi Arabia was estimated to be around 6.4%. Factors, such as age, low level of education, hypertension, and cardiovascular disease were risk factors for cognitive impairment. Since such disorders require constant monitoring, increasing cases of cognitive impairment and cardiovascular diseases may propel the demand for the product, thereby surging the market growth.

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Similarly, according to the NIH research study published in November 2021 the prevalence of coronary artery disease (CAD) symptoms was 25.1%, and the complications associated with the diseases comprised 72.7%. In addition, the same source also reported that the prevalence of a family history of CAD was 9.3%, overweight/obesity was 58.6%, physical inactivity was 79.1%, and smoking was 24.1%. Due to the high prevalence of cardiovascular diseases and their risk factors in the general population, there is a growing need for their diagnosis and treatment, which is likely to fuel market expansion. Thus, owing to such factors significant market growth is anticipated over the forecast period.

However, the high cost of technology is expected to hinder market growth over the forecast period.

## Saudi Arabia Patient Monitoring Market Trends

### Cardiology Segment is Expected to Witness Considerable Growth Over the Forecast Period

Market expansion is anticipated to be driven by factors such as the rising incidence of cardiovascular diseases, the growing number of obese people, the expanding ranks of the elderly, and the improving capabilities of telemedicine. Case in point: stroke occurs at a rate of 43.80 per 100,000 Saudis, as reported by a study published in August 2021. Most participants (81.7%), followed by those with a history of stroke (74.1%) and those with a history of dyslipidemia (57.2%), selected a personal history of hypertension as a risk factor, according to the same source. The study also indicates that there was a low level of awareness regarding cardiovascular diseases and their risk factors which leads to the high prevalence of the disease. Thus, conditions such as hypertension and obesity are the major factors triggering cardiovascular diseases and stroke, therefore, increasing cases of such conditions may propel cardiovascular diseases which in turn will surge the demand for patient monitoring devices in Saudi Arabia.

Furthermore, digital health innovation is a key part of the vision, with the Ministry of Health aiming for 70.0% of citizens to have unified digital records by 2022 and improvements in IT to significantly strengthen the quality of services offered by healthcare providers.

Thus, owing to the abovementioned factors, the cardiology segment is anticipated to witness significant growth over the forecast period.

### Home Healthcare Segment is Expected to Witness Significant Growth Over the Forecast Period

The major factors for the growth of the home healthcare market in Saudi Arabia are expected to be rising disposable income and the high incidence of surgical procedures. The high disposable income is expected to enable consumers to afford self-monitoring devices in Saudi Arabia, thereby ultimately contributing to the growth of the market. In a similar vein, the high volume of surgical procedures is anticipated to increase the demand for post-operative care and home-based patient monitoring devices, thereby contributing to the expansion of this market segment over the forecast period.

The rising disposable income in Saudi Arabia is one of the major factors propelling the segment's growth. For instance, as per the World population review article published in 2022 the disposable income of the population in Saudi Arabia in 2022 was USD 36,408,820. Similarly, the growing initiatives in the kingdom are expected to propel the segment growth. In May 2022, Tamer, the healthcare distribution company, signed a 5 year deal to launch Huma's market-leading technology platform 'hospitals at home' with remote patient monitoring to the 34 million people living in the Kingdom of Saudi Arabia.

Therefore, such high disposable income among the Saudi Arabia population is expected to enable the adaption of home healthcare-based patient monitoring devices, thereby boosting the growth of the segment over the forecast period.

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## Saudi Arabia Patient Monitoring Industry Overview

The Saudi Arabia patient monitoring market is moderately fragmented and competitive and consists of several major players. In terms of market share, a few of the major players are currently dominating the market. Some of the major players in the market are Abbott Laboratories, Becton, Dickinson and Company, Drägerwerk AG, GE Healthcare, and Medtronic PLC among others.

### Additional Benefits:

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

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