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South America Fetal & Neonatal Monitoring - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 115 pages | Mordor Intelligence

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Report description:

The South America Fetal & Neonatal Monitoring Market size is estimated at USD 493.56 million in 2024, and is expected to reach USD 653.66 million by 2029, growing at a CAGR of 5.78% during the forecast period (2024-2029).

The COVID-19 pandemic has had a significant impact on the fetal and neonatal monitoring market. Since the beginning of the pandemic, there have been a significant number of deaths, and from the beginning of 2020 to the first few months of 2021, Brazil ranked among the top countries in the world for COVID-19 cases and fatalities. There was a decline in the birth rate in Brazil during the COVID-19 pandemic. For instance, as per the report titled "Rapid changes in birth counts in Brazilian major cities during the COVID-19 pandemic" published by Vienna Yearbook of Population Research 2022, there was a strong decline in the number of births in some of the cities of Brazil and most reductions were observed in the women aged around 30 years. Also, according to the same above-mentioned source, the decreasing trend in birth counts has slowed down in the cities of Rio de Janeiro and Belo Horizonte in 2022. Due to the uncertainty surrounding the pandemic, women have postponed and realized their fertility intentions. Thus the COVID-19 has a negative impact on the fetal & neonatal monitoring market as the birth rate has declined during the pandemic.

The South America fetal & neonatal monitoring market growth is attributed to the growing birth rate, preterm births, increasing cesarean sections, and increased complications during childbirth. Fetal & neonatal monitoring is important in delivering life-sustaining, non-invasive, and developmentally supportive care to neonates and in providing a quiet and serene environment to protect the development of the fetus. Thus, there is a great demand for these products at a low cost or locally manufactured products with safety as the main criterion. For instance, according to the Organization for Economic Cooperation and Development (OECD) Health stats, the infant mortality with no minimum threshold of gestation period or birthweight in Colombia for 2020 and 2021 were reported as 16.8 and 16.5 per 1000 live births respectively. The significant cases of infant mortality can be decreased with proper monitoring devices after birth. Hence the demand for fetal and neonatal monitoring devices may increase and drive the market growth during the study period.

However, the limited accessibility and stringent regulatory procedures are restarining the growth of market during the study period.

South America Fetal & Neonatal Monitoring Market Trends

Neonatal Monitoring Segment is Expected to Dominate the Market

Neonatal monitoring instruments are used in the neonatal intensive care unit (NICU), emergency room, and operating theatre at all levels of hospitals for continuous monitoring of neonates and infants. Preterm-born babies are more prone to infections and diseases and require more care. The neonatal monitoring system is capable of monitoring parameters such as electrocardiogram, respiration rate, heart rate, blood pressure, peripheral capillary oxygen saturation (SpO2), and body temperature.

According to the report titled "Nearly one in five babies in Brazil born 'small' and at risk of early childhood death" published in August 2021, over 18% of babies born in Brazil in the last seven years were born small either due to preterm, small for gestational age (SGA) or with low birthweight (LBW). With the significant burden of low birth weight among infants and neonates after birth, the demand for neonatal monitoring devices increases, and hence, the market shows a positive impact during the study period.

Thus, owing to the above-mentioned factors, the studied segment is expected to witness significant growth over the forecast period.

Brazil Holds the Major Share, and it is Expected to Dominate the Market Over the Forecast Period

Brazil is expected to dominate the market as it has well-structured and developed healthcare systems.

As per the study report titled "Increased preterm birth following maternal wildfire smoke exposure in Brazil" published in March 2022, wildfire smoke exposure during pregnancy may be associated with preterm birth in Brazil. Similarly, According to the Organization for Economic Cooperation and Development (OECD) Health stats, the mortality of neonates with no minimum threshold of gestation period or birthweight in 2020 was reported as 8.7 deaths per 1000 live births which can be avoided using proper monitoring devices. Preterm births need proper monitoring which increases the demand for the fetal and neonatal monitoring devices market in this region.

With the huge burden of preterm births and mortality rate among neonates, the region is expected to have a demand for monitoring devices that help to drive the market during the study period.

South America Fetal & Neonatal Monitoring Industry Overview

The South America fetal & neonatal monitoring market is moderately competitive. The majority of fetal and neonatal monitoring equipment and devices are being manufactured by the global key players. Market leaders who have greater distribution networks and more research funding have carved out niches for themselves. Market players are now looking to form mergers and acquisitions with local players to establish their businesses. Some of the major players in the market are NIHON KOHDEN CORPORATION, Medtronic, General Electric Company, Koninklijke Philips N.V., Dragerwerk AG & Co. KGaA, FUJIFILM Holdings Corporation, Welch Allyn, Shenzhen Mindray Bio-Medical Electronics Co., Ltd., Ultraschall SA, and MEDIX Medical Devices SRL.

Additional Benefits:

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

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