Patient Monitoring Devices and Accessories - A Global Market Overview

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Report description:

Global Patient Monitoring Devices and Accessories Market Trends and Outlook
Patient monitoring devices and accessories are tools used to monitor vital functions and physiological parameters in real time, leading to accurate diagnostics and rapid medical interventions in any environment, whether in a hospital, clinic, or home care. These include devices such as blood glucose monitors in diabetic patients, multi-parameter monitors used in the ICU, standby separation to monitor vital functions such as ECG, temperature, and saturation by oxygen, and cardiac monitors such as ECG and Holter monitors. Respiratory monitoring devices monitor SPO2 levels, CO2 frequencies, and respiratory tract and temperature monitoring equipment in operations, infections, or critical care. Hemodynamics and pressure monitoring devices provide continuous blood pressure measurement and heart rate. Fetal monitoring devices evaluate the condition of the fetus during labor and the vital condition of the newborn after delivery. Neuromonitoring tools like EEG monitor brain activities and intracranial pressure, especially in neurosurgery or critical care environments. The weight monitoring device monitors body weight changes that may indicate health problems such as fluid retention or malnutrition. Other monitors include sleep monitors and EEG monitors. Accessories that complement the advanced functions of these systems include blood glucose testing: glucometers, strips and lance, electrodes, sensors, catheters, power sources, cables, connectors, data storage devices, protective equipment, and calibration tools. Together, these devices and accessories provide comprehensive, accurate, and adapted monitoring to achieve optimal patient results.

The global Patient Monitoring Devices and Accessories market is estimated at US$63.4 billion in 2024 and is projected to grow to US$102.3 billion by 2030, with a CAGR of 8.3% during the forecast period 2024-2030. The patient monitoring devices and accessories market is driven primarily by the high prevalence of chronic diseases, such as diabetes, cardiovascular conditions, and respiratory disorders, primarily among the older population. Since these diseases continuously progress and do not offer patients a long lifespan, there is a continuous necessity for constant follow-up, enhancing patient care, and outcome improvements.

Advances in technology, engaging AI and IoT, have improved the functionality of monitoring devices, thereby furthering the capabilities in early detection and treatment. The growing availability of portable, easy-to-use devices designed for home healthcare settings and telemedicine is contributing to this market demand. Innovations in wearable health monitors, mobile health apps, and predictive analytics are driving the market. The shift to remote patient monitoring and value-based care is increasingly adopted because these solutions offer cost-effective, real-time data on the precise number of patients to be managed. Advancements in sensor technology, along with wireless communication, are expanding the capabilities of patient monitoring devices. The demand for healthcare solutions in residential settings, which surged during the COVID-19 pandemic, accelerated further growth in the market. In addition, with an aging population characteristically suffering chronic conditions and needing continuous observation, the market continues to grow.

Patient Monitoring Devices and Accessories Regional Market Analysis
North America is estimated to hold the largest share of 35% in 2024, due to the high prevalence of chronic diseases, technological advancements, and the adoption of wireless, portable systems to reduce healthcare costs. Major companies' investments in R&D and the growing aging population further drive market growth. Conversely, Asia Pacific is projected to record the fastest growth rate with a 9.9% CAGR during the forecasting period 2024-2030. This growth is driven by the rising chronic diseases like diabetes and obesity, mainly caused by unhealthy lifestyles. Increased demand and awareness towards monitoring devices related to blood glucose and cardiac health boost this region's growth. Despite the challenges such as the high cost of devices and privacy concerns, this region has the advantage of economic growth, a large population base, and improved purchasing power.

Patient Monitoring Devices and Accessories Market Analysis by Product
The patient monitoring devices segment is the largest market, accounting for an estimated 80.4% share in 2024. This dominance is because these devices play a critical role in the management of chronic conditions, including diabetes, cardiovascular diseases, and respiratory disorders. The growing adoption of IoT-enabled monitoring and wireless devices further strengthens this segment. In contrast, the accessories segment is expected to record the fastest growth rate with a CAGR of 9.2% from 2024 to 2030. A rise in patient monitoring devices enhances the growth prospects of this category, as patient monitoring devices work with accessories, such as sensors, electrodes, and testing supplies.

Patient Monitoring Devices Market Analysis by Type
Blood glucose monitoring dominates the patient monitoring device market with a 24% share in 2024 due to the increasing prevalence of diabetes, older populations, and technological advancements such as CGM and smartphone-linked non-invasive tests. Additionally, demands for remote and personalized monitoring, support from regulatory policies, and government initiatives drive the market growth. On the other hand, the cardiac monitoring devices segment is anticipated to experience rapid growth with a 9.9% CAGR between 2024 and 2030. This growth is due to the increase in cardiovascular diseases and lifestyle factors along with the population aging process. Technological advancements in the form of wearable ECG monitors, Holter devices, and AI-driven diagnostic tools are enhancing patient outcomes, while favorable reimbursement policies and an increasing number of cardiac surgeries are expanding the segment.

Patient Monitoring Accessories Market Analysis by type
Blood glucose testing supplies hold the largest share of the patient monitoring accessories market, with a 40.5% share in 2024. The high frequency of diabetes testing and regular use of test strips, lancets, and control solutions for glucose monitoring drive this segment's dominance. This segment will continue to grow as the prevalence of diabetes rises globally. In contrast, Electrodes, sensors, and catheters are expected to experience the fastest growth in the accessories segment, with a CAGR of more than 10% from 2024 to 2030. The increasing use of wearable monitoring devices and advanced sensor technologies in applications like cardiac and neurological care is driving this growth.

Patient Monitoring Devices and Accessories Market Analysis by End-User
The hospital segment leads the patient monitoring devices & accessories end-user market, holding a 59.2% share in 2024, driven by increasing demand for innovative monitoring technologies in inpatient and outpatient care. Hospitals utilize multi-parameter monitors, ECG devices, and respiratory monitors for vital sign monitoring and managing severe conditions. The rise in chronic diseases, surgical procedures, and patient admissions further fuels this growth. Advanced monitoring devices are enhancing patient outcomes and safety, specifically in intensive care units. Meanwhile, the home care settings segment is projected to grow

rapidly with a 10.3% CAGR from 2024 to 2030, driven by the shift toward at-home healthcare, chronic condition management, and telemedicine. Developments in portable and wireless monitoring devices and the demand for cost-effective alternatives to hospital visits are contributing to this growth. As healthcare delivery increasingly shifts to home settings, the market for home care monitoring devices is poised for significant expansion.

Patient Monitoring Devices and Accessories Market Report Scope

This global report on Patient Monitoring Devices and Accessories analyzes the global and regional markets based on product, sub-type, and end-user for the period 2021-2030 with projections from 2024 to 2030 in terms of value in US$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US$

Companies Mentioned: 40+

Patient Monitoring Devices and Accessories Market by Geographic Region

- North America (The United States, Canada, and Mexico)
- Europe (Germany, France, the United Kingdom, Italy, Spain, and Rest of Europe)
- Asia-Pacific (Japan, China, India, South Korea, and Rest of Asia-Pacific)
- South America (Brazil, Argentina, and Rest of South America)
- Rest of World

Patient Monitoring Devices and Accessories Market by Product

- Patient Monitoring Devices
  - Blood Glucose Monitoring Devices
  - Multi-parameter Monitoring Devices
  - Cardiac Monitoring Devices
  - Respiratory Monitoring Devices
  - Temperature Monitoring Devices
  - Hemodynamic/Pressure Monitoring Devices
  - Fetal & Neonatal Monitoring Devices
  - Neuromonitoring Devices
  - Weight Monitoring Devices
  - Other Devices (Including Sleep Monitoring Devices, EEG Monitoring Devices, and others)
- Patient Monitoring Accessories
  - Blood Glucose Testing Supplies
  - Electrodes, Sensors & Catheters
  - Other Accessories (Including Power Solutions, Cables & Connectors, Mounts, Data Storage, Protective Equipment, Calibration Tools, and others)

Patient Monitoring Devices and Accessories Market by End-User

- Hospitals
- Ambulatory Surgical Centers
- Homecare Settings

Other End-Users (Including Rehabilitation Centers, Long-term Care Facilities, Nursing Homes, and others)

Table of Contents:

- Edwards Lifesciences Corporation
- Fukuda Denshi Co., Ltd.
- GE Healthcare
- Getinge AB
- ICU Medical, Inc.
- Innomed Medical Inc.
- Intel Corporation
- Koninklijke Philips N.V.
- LifeScan, Inc.
- Masimo Corporation
- Medical Guardian LLC.
- Medtronic plc
- Microlife Corporation
- Midmark Corporation
- Natus Medical Incorporated.
- Nihon Kohden Corporation
- Nonin Medical Inc
- Omron Corporation
- OSI Systems, Inc.
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