Global Cardiac Monitoring Market - Focused Insights 2025-2030

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Report description:

The global cardiac monitoring market is expected to grow at a CAGR of 8.22% from 2024 to 2030.

RECENT VENDORS ACTIVITIES

-In 2024, Vivalink -a leading company in digital healthcare solution development and manufacturing launched a Turnkey ambulatory cardiac monitoring solution for Holter Monitoring and Mobile Cardiac Telemetry (MCT).
-In 2023, InfoBionic announced that it received FDA (510 K) approval for its advanced remote ECG monitoring device. This device produces Bluetooth diagnostic 6-lead sensors for patient-required cardiac monitoring.
-In 2023, BIOTRONIK- one of the leading companies in implantable medical device technology announced the first global implantation of its BIOMONITOR IV implantable cardiac monitor.

KEY TAKEAWAYS

-By Product: The resting ECG holds the largest market share of over 37% in 2024. Resting ECG is widely used for checking irregular heartbeats, which are cardiac arrhythmias, thus helping segmental growth.
-By Mode: The ambulatory mode segment shows the highest growth of 9.79% during the forecast period.
-By End-User: The hospital segment accounts for the largest market share. Hospitals consist of emergency departments, general wards, ICU departments, surgery centers, and specialty care departments where cardiac monitors are used for a range of applications.
-By Geography: North America is one of the biggest and fastest-growing global cardiac monitoring markets, driven by the increasing aging population with heart conditions, acceptance of preventive cardiac care approaches, and highest healthcare expenditure on cardiovascular disease management.
-Growth Factor: The global cardiac monitoring market is set to grow due to the growing burden of cardiovascular diseases and the growing demand for long-term cardiac monitoring with implantable cardiac monitors.

MARKET TRENDS & DRIVERS

Future Of Electrocardiograms with Self-powered Electrodes

Electrocardiography (ECG or EKG) monitoring is routinely performed by health professionals/workers and reveals heart health with the available several types of traditional and advanced ECG monitors. Of these, around 12 electrodes are placed on the individual's body which is challenging for the patient. Also, they are used for short-term monitoring in health settings. However, the user burden and battery life of these systems limit the duration of cardiac monitoring. This led to increased attention towards the development of self-powered and minimum electrode placements. Recently, to enable long-term cardiac monitoring in-home or outside health settings with a minimum of 3 electrodes, the cardiac monitoring industry has increased its focus on the development of self-powered and long-term electrodes for ECG.

Artificial Intelligence & Machine Learning in Cardiac Monitoring

Artificial Intelligence (AI) and machine learning (ML) are becoming essential parts of cardiac monitoring and play a vital role in enhancing patient health and minimizing work burden, human error, and increasing work efficiency in health settings. AI & ML application to stress or resting ECG is dramatically affecting electrocardiography, by automating data interpretation, massively scaled human capabilities, and enabling analysis with interpretation of an exponentially growing number of ECGs. The integration of AI and ML in cardiac monitors appears effective in detecting occult structural heart diseases up to 1 to 2 years earlier compared to traditional methods. Furthermore, AL and ML have proven effective in the identification of several structural heart diseases earlier, including aortic stenosis, amyloid heart disease, hypertrophic cardiomyopathy, and pulmonary hypertension earlier up to 1 year.

Growing Burden of Cardiovascular Diseases

Cardiovascular diseases (CVD) are a group of heart and blood vessel diseases including cerebrovascular diseases, coronary artery diseases, rheumatic heart diseases, and several others. The World Heart Federation reported that in 2024, around 0.5 billion people across the world continue to be affected with CVD accounting for more than 20 million deaths worldwide. Coronary heart diseases, stroke, and hypertensive disease that demand cardiac monitoring accounted for 10%, 9%, and 2% of all CVD cases annually across the world. The growing burden of CVD led to an increased demand for heart monitoring which accounted for the highest demand for cardiac monitors.

Growing Demand for Long-term Cardiac Monitoring with Implantable Cardiac Monitors

Cardiovascular diseases are the leading cause of death across the world and have led to increasing demand for long-term care. To prevent and manage these burdens several advancements reported in the cardiac care industry, including implantable cardiac monitors (ICM). In cardiac monitoring, ICM is now recognized as the most essential medical solution that continuously monitors heart rhythm. The development in ICM, such as miniaturization, easier implant procedure, and continued remote monitoring is rapidly propelling the market growth. Now ICMs become most standard of care for long-term heart monitoring of unexplained stroke, unexplained fainting, arrhythmia, and after-ablation therapy.

INDUSTRY RESTRAINTS

Challenges Associated with Cardiac Monitoring Devices

Cardiac monitors have become increasingly popular to diagnose heart diseases such as early arrhythmia to prevent stroke associated with the disease. However, they are also associated with many limitations and risks. The challenges associated with

cardiac monitoring devices are skin irritation, tissue breakdown, non-waterproof properties, and hurdles with regular activities. Sometimes prolonged application of wearable and ambulatory monitors may cause tissue breakdown or skin irritation at the application site due to the adhesive electrode patches of the monitor.
In addition, there may be other risks depending upon the wearer's specific medical condition. Moreover, most conventional ambulatory monitors are not waterproof and do not allow the wearer to take a bath, shower, or swim. In such cases, minimal contact with water may cause harm to the user. Therefore, the wearer needs to take it off while taking a shower. In some cases, taking off the monitor during such activities might miss an important heart event that could give the physician key information about the patient's health.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT

The global cardiac monitoring market by product is segmented into resting ECG, implantable cardiac monitoring, stress ECG, mobile cardiac telemetry, Holter monitoring, cardiac event monitoring, and cardiac output monitoring. In 2024, the resting ECG segment dominates and holds the largest market share of over 37%. Resting ECG primarily functions to record and monitor the heart's electrical signals when the patient is calm and still. It is considered one of the essential and valuable medical technologies for identifying various cardiovascular conditions. Resting ECG is widely used for detecting cardiac arrhythmias, which are irregular heartbeats. The application of resting ECG is growing rapidly in CVD care and management, as it is a valuable technique for identifying several other heart conditions, including angina pectoris, myocardial infarction, and abnormalities such as left ventricular hypertrophy, heart failure, and cardiac conduction disorders. Furthermore, its potential benefits include the early identification of future heart conditions at the preclinical stage, recognizing factors that may contribute to CVD events, and establishing a baseline ECG to serve as a comparator for subsequent tests.

-□By Product
o□Resting ECG
o□Implantable Cardiac Monitoring
o□Stress ECG
o□Mobile Cardiac Telemetry
o□Holter Monitoring
o□Cardiac Event Monitoring
o□Cardiac Output Monitoring

INSIGHTS BY MODE

The global cardiac monitoring market by mode is categorized into standard and ambulatory. The ambulatory mode segment shows significant growth, with the fastest-growing CAGR of 9.79% during the forecast period. Ambulatory mode refers to the use of wearable and remote cardiac monitors by individuals outside healthcare settings. It involves the utilization of cardiac monitoring systems in homecare, remote care, and outpatient settings. Technological advancements, such as implantable cardiac monitors (ICMs), Holter monitors, and mobile cardiac telemetry (MCT), have enabled cardiac monitors to be used as portable devices. Furthermore, the miniaturization and portability of these monitors allow individuals to track their heart health even during work hours. Remote and ambulatory monitoring is becoming increasingly widespread among physicians and patients for long-term, continuous monitoring and diagnosis of heart disease. Advancements in hardware and software have led to the development of innovative, cost-effective, and practical devices that provide critical alerts for urgent medical procedures and events requiring hospitalization while enabling the monitoring of vulnerable individuals from the comfort of their homes.

-□By Mode

o Standard
o Ambulatory

INSIGHTS BY END-USER

Based on the end-user, the hospital segment accounted for the largest global cardiac monitoring market share. Hospitals consist of emergency departments, general wards, ICUs, surgery centers, and specialty care departments where cardiac monitors are used for a range of applications. From ECGs to continuous heart monitoring, cardiac monitoring systems play a crucial role in hospital settings. Heart failure, coronary atherosclerosis, stroke, atrial fibrillation, and acute myocardial infarction are among the leading heart conditions that account for the highest hospitalizations. In hospitals, the cardiac care unit (CCU) is a specialized ward dedicated to treating patients with severe or acute heart problems. Individuals undergoing heart surgeries or procedures are also placed in the CCU during their recovery. These units are well-equipped with advanced cardiac monitoring devices and staffed by medical professionals trained in heart care, contributing to the growth and advancement of cardiac treatment.

- By End-User
o Hospitals
o Specialty Cardiac Clinics & Centers
o Diagnostic Centers
o Others

GEOGRAPHICAL ANALYSIS

North America dominates and holds the largest share and shows the highest growth in the global cardiac monitoring market, with the U.S. contributing to the highest revenue share as it is the largest economy in the region. Furthermore, North America has the highest healthcare expenditure on cardiovascular diseases. The demand for cardiac monitoring is growing with the increasing adoption of wearable and remote cardiac monitoring devices. With rising awareness and attention toward heart health, the regional population has increasingly started using health trackers, mobile applications, and smartwatches, enhancing access to remote cardiac monitoring. In North America, the U.S. generates the highest revenue due to the significant CVD patient population and associated healthcare expenditure. Cardiac healthcare services in North America have become highly advanced, supporting the increased adoption of next-generation cardiac monitoring technologies.

- By Geography

- North America
o US
o Canada
- Europe
o Germany
o France
o UK
o Italy
o Spain
- APAC
o Japan
o China
o India
o South Korea

o Australia
- Latin America
o Brazil
o Mexico
o Argentina
- Middle East & Africa
o Turkey
o Saudi Arabia
o South Africa

COMPETITIVE LANDSCAPE

The global cardiac monitoring market report consists of exclusive data on 60 vendors. Abbott, Boston Scientific Corporation, Medtronic, and Koninklijke Philips are among the leading companies with the highest market share in the global cardiac monitoring market. These vendors offer high-quality and reliable cardiac monitoring solutions that meet customer requirements and international regulatory standards. Market players are continuously improving product efficiency and strengthening their market positions. These companies have a strong brand image and a wide geographical presence across the global market. Additionally, the adoption of various strategies?such as product launches, new product development with advanced technologies, and acquisitions?has intensified market competition. By implementing these strategies and focusing on expanding their capabilities, major market players have successfully increased their revenue share in the market.

Key Vendors

o Abbott
o Boston Scientific Corporation
o Baxter
o GE Healthcare
o iRhythm Technologies
o Medtronic
o OSI Systems
o Koninklijke Philips N.V.

Other Prominent Vendors

o Aerotel Medical Systems
o ACS Diagnostics
o AliveCor
o Advanced Instrumentations
o ASPEL
o Biotricity
o BPL Medical Technologies
o BIOTRONIK
o BORSAM Biomedical Instruments
o BTL
o Bittium
o Cortrium
o Contec Medical Systems

o custo med
o CardioComm Solutions
o Cardiolex Medical AB
o DMS SERVICE
o Deltex Medical
o Edwards Lifesciences Corporation
o EDAN Instruments
o FUKUDA DENSHI
o Getinge
o Holter Supplies
o Hangzhou Beneware Medical Equipment
o Shenzhen Hanix United
o iMedrix
o InfoBionic. Ai
o Labtech
o Lepu Medical Technology (Beijing)
o LUMED
o Masimo
o Medicalgorithmics
o medical ECONET GmbH
o Medicomp
o Meditech Equipment
o MEDITECH KFT
o MIDMARK
o MONITOR
o Nasan Medical Electronics
o Nasiff Associates
o Neurosoft
o Norav Medical
o NorthEast Monitoring
o Oy Diagnostic Devices Development - DDD
o RhythMedix
o Remo Care Solutions
o ScottCare
o SCHILLER
o VasoMedical (Vaso Corportaion)
o VIGOCARE - CONNECTED CARE INDIA PVT. LTD
o VivaLNK
o Wearlinq

KEY QUESTIONS ANSWERED:

1. What is the expected growth of the global cardiac monitoring market?
2. Which region will have the highest growth in the global cardiac monitoring market?
3. Who are the major players in the global cardiac monitoring market?
4. Which product type will dominate the global cardiac monitoring market?
5. What are the factors driving the global cardiac monitoring market?

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