

## **Europe Wearable Medical Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

Europe Wearable Medical Devices Market Analysis

The Europe wearable medical device market size stands at USD 11.86 billion in 2025 and is projected to reach USD 24.19 billion by 2030, reflecting a 15.32% CAGR through the forecast period. Ongoing regulatory harmonization under the Medical Device Regulation (MDR), chronic disease prevalence, and workforce shortages are propelling continuous monitoring adoption across clinical and consumer settings. National reimbursement frameworks-most notably Germany's Digital Care Act-are recasting clinically validated wearables as prescribable therapies rather than wellness accessories, while EUR 403 million in fresh EU innovation funding is accelerating product pipelines for next-generation devices. Supply-chain diversification, energy-harvesting breakthroughs, and multimodal sensor stacks are lowering form-factor barriers and enabling longer device lifespans. At the same time, fragmented post-GDPR data-sharing rules and physician accuracy concerns temper near-term momentum, keeping clinical validation central to market expansion strategies.

Europe Wearable Medical Devices Market Trends and Insights

Regulatory Push for MDR-Approved Medical Wearables

MDR enforcement since 2021 has made Europe wearable medical device market entrants prove clinical performance, transforming wearables from lifestyle gadgets into regulated medical tools. Heightened post-market clinical follow-up requirements create continuous data loops that improve algorithmic accuracy, but longer certification timelines favor capital-rich

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incumbents. Material-safety clauses are prompting shifts toward biocompatible polymers, spurring sustainable design innovations. Collectively, these factors enhance physician confidence and raise entry barriers for small, non-specialist startups.

#### Rapid Sensor Miniaturization & Multimodal Chips

Micro-fabrication has enabled single chips to track multiple vitals, reducing device bulk and broadening use cases. Trinity Biotech's CGM+ integrates continuous glucose, temperature, and hydration sensing into a coin-sized patch, illustrating this shift. Power draw has fallen to microwatt levels, extending battery life and paving the way for energy-harvesting modules. The design freedom encourages diverse form factors-from adhesive patches to implantable-expanding the Europe wearable medical device market adoption among pediatric and geriatric cohorts.

#### Fragmented EU Data-Sharing Rules Post-GDPR

National differences in GDPR interpretations oblige manufacturers to redesign consent flows for each market, delaying pan-EU launches. Providers remain wary of integrating continuous data into electronic records due to liability exposure and privacy litigation risk. These siloes impede predictive analytics models that rely on transnational data sets, curbing Europe's wearable medical device market scalability until harmonized guidance emerges.

Other drivers and restraints analyzed in the detailed report include:

Healthcare Payer Shift to Outcomes-Based Models / EU Digital Therapeutics Reimbursement Pilots / Clinical-Grade Accuracy Skepticism Among Physicians /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Diagnostic and monitoring wearables delivered 62.55% of the Europe wearable medical device market share in 2024, confirming hospital and payer priorities for continuous surveillance over on-device therapy. The subsegment is set to grow at 15.73% through 2030, propelled by chronic disease prevalence and post-discharge monitoring mandates. Continuous glucose monitors spearhead growth, benefiting from improved catalytic enzymes and wireless calibration. Vital-sign patches now bundle ECG, SpO<sub>2</sub>, and respiratory-rate sensing, lowering equipment budgets for tele-ICU programs. Therapeutic wearables remain niche but show bright spots in neuromodulation and closed-loop insulin delivery. Energy-autonomous stimulators and patch pumps are reducing patient burden, encouraging broader endocrinology adoption. These trends cement the Europe wearable medical device market as a cornerstone of predictive, outpatient-centric care.

Therapeutic devices own the remainder of the segment share and are pivoting toward condition-specific algorithms that titrate therapy in real time. Pain-management platforms combine electrical stimulation with biometric feedback, addressing opioid-reduction mandates. Respiratory wearables equipped with AI cough classifiers have found post-COVID-19 utility, while rehabilitation exosleeves transmit range-of-motion telemetry to physiotherapists. Segment differentiation now revolves around clinical evidence, algorithm transparency, and MDR compliance-factors that define winning positions within the Europe wearable medical device market.

Users aged 18-60 acquired 60.22% of the Europe wearable medical device market size in 2024, on the back of employer wellness subsidies and digital-first insurance products. However, under-18 adoption is expanding at a 16.29% CAGR, aided by parental demand for pediatric diabetes sensors and school-based wellness programs. Designs featuring gamified dashboards and child-sized wear bands improve engagement, lowering attrition rates. For seniors, interface simplicity and energy harvesting are

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paramount. Night-time fall-detection pendants and low-dexterity charging cradles target common geriatric pain points. As EU demographics skew older, long-term adoption hinges on caregiver integration and reimbursement-backed remote monitoring-both pivotal to the Europe wearable medical device market.

Clinicians report higher adherence among digital-native minors compared to seniors, creating longitudinal data sets that bolster preventive-care algorithms. Policy makers view early-life monitoring as a lifetime cost-saving lever, reinforcing government funding for pediatric trials. Across all groups, personalized coaching rooted in behavioral science is lifting sustained device engagement, a critical KPI for recurring-revenue business models in the Europe wearable medical device industry.

The Europe Wearable Medical Device Market Report is Segmented by Device Type (Diagnostic & Monitoring Devices [Vital-Sign Monitoring Devices and More], Therapeutic Devices[Pain-Management Devices and More]), Age Group (Under 18 and More), Distribution Channel (Online, Offline), Application (Sports & Fitness and More), End-User (Consumers and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Abbott Laboratories / Alphabet Inc. / Apple / Beurer / Biobeat Technologies Ltd. / Dexcom / Garmin / Huawei Technologies / Intelesens / Koninklijke Philips / Medtronic / MINTTI Health / OMRON / Oura Health Oy / Polar Electro / Resmed / Samsung Group / Suunto Oy / Withings SA / Xiaomi Corporation /

Additional Benefits:

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

## **Table of Contents:**

1 Introduction

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Regulatory Push for MDR-Approved Medical Wearables

4.2.2 Rapid Sensor Miniaturization & Multimodal Chips

4.2.3 Employer-Funded Corporate Wellness Programmes

4.2.4 Healthcare Payer Shift to Outcomes-based Models

4.2.5 Micro-Energy Harvesting to Remove Charging Friction

4.2.6 EU Digital Therapeutics Reimbursement Pilots

4.3 Market Restraints

4.3.1 Fragmented EU Data-Sharing Rules Post-GDPR

4.3.2 Supply-Chain Risk from China-Centric Battery Vendors

4.3.3 Plateauing Early-Adopter Replacement Cycles

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#### 4.3.4 Clinical-Grade Accuracy Skepticism Among Physicians

#### 4.4 Supply Chain Analysis

#### 4.5 Regulatory Landscape

#### 4.6 Technological Outlook

#### 4.7 Porter's Five Forces Analysis

##### 4.7.1 Threat of New Entrants

##### 4.7.2 Bargaining Power of Buyers

##### 4.7.3 Bargaining Power of Suppliers

##### 4.7.4 Threat of Substitutes

##### 4.7.5 Intensity of Competitive Rivalry

### 5 Market Size & Growth Forecasts (Value)

#### 5.1 By Device Type

##### 5.1.1 Diagnostic & Monitoring Devices

###### 5.1.1.1 Vital-sign Monitoring Devices

###### 5.1.1.2 Sleep-monitoring Devices

###### 5.1.1.3 Continuous-Glucose Monitors

###### 5.1.1.4 Blood-pressure Monitors

###### 5.1.1.5 Other Diagnostic & Monitoring Devices

##### 5.1.2 Therapeutic Devices

###### 5.1.2.1 Pain-management Devices

###### 5.1.2.2 Rehabilitation Devices

###### 5.1.2.3 Respiratory-therapy Devices

###### 5.1.2.4 Insulin-delivery Devices

###### 5.1.2.5 Other Therapeutic Devices

#### 5.2 By Age Group

##### 5.2.1 Under 18

##### 5.2.2 18 - 60

##### 5.2.3 Above 60

#### 5.3 By Distribution Channel

##### 5.3.1 Online

##### 5.3.2 Offline

#### 5.4 By Application

##### 5.4.1 Sports & Fitness

##### 5.4.2 Remote Patient Monitoring

##### 5.4.3 Home Healthcare

#### 5.5 By End-User

##### 5.5.1 Consumers

##### 5.5.2 Hospitals & Clinics

##### 5.5.3 Long-term Care Centres

##### 5.5.4 Ambulatory Surgical Centres

##### 5.5.5 Others

#### 5.6 By Geography

##### 5.6.1 Germany

##### 5.6.2 United Kingdom

##### 5.6.3 France

##### 5.6.4 Italy

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5.6.5 Spain

5.6.6 Rest of Europe

6 Competitive Landscape

6.1 Market Concentration

6.2 Competitive Benchmarking

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)Products & Services, and Recent Developments)

6.4.1 Abbott Laboratories

6.4.2 Alphabet Inc.

6.4.3 Apple Inc.

6.4.4 Beurer GmbH

6.4.5 Biobeat Technologies Ltd.

6.4.6 Dexcom Inc.

6.4.7 Garmin Ltd.

6.4.8 Huawei Technologies Co., Ltd.

6.4.9 Intelesens Ltd.

6.4.10 Koninklijke Philips N.V.

6.4.11 Medtronic plc

6.4.12 MINTTI Health

6.4.13 Omron Corporation

6.4.14 Oura Health Oy

6.4.15 Polar Electro Oy

6.4.16 ResMed Inc.

6.4.17 Samsung Electronics Co., Ltd.

6.4.18 Suunto Oy

6.4.19 Withings SA

6.4.20 Xiaomi Corporation

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-Need Assessment

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