

# Multiparameter Patient Monitoring Devices Market - Global Outlook and Forecast 2020-2025

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## Abstracts

The global multiparameter patient monitoring market is expected to grow at a CAGR of over 4% during the period 2019–2025.

The following factors are likely to contribute to the growth of the multiparameter patient monitoring market during the forecast period:

Growing Demand for Real-time Patient Monitors in Critical Care

Increasing Target Patient Population with Various Diseases

Rising Demand for Multi-parameter Patient Monitors in Home-care Settings

Growing Demand for Portable/Compact Multi-Parameter Monitors

The global multiparameter patient monitoring market is likely to witness absolute growth because of the increasing application in hospitals, home care settings, and ambulatory surgery centers (ASCs). These devices are widely used in ICUs, emergency departments, and general wards to continuously monitor vital signs such as heart rate, blood pressure, and respiration rate. The introduction of advanced technologies, such as real-time, continuous, and remote patient monitoring (RPM), is expected to influence the market during the forecast period.

Moreover, the increasing prevalence of chronic diseases and the increase in the elderly population are likely to be the major drivers for the multiparameter patient monitoring market. Globally, the prevalence of chronic diseases such as cancer is increasing at an

alarming rate due to changing lifestyles, aging population, environmental pollutions, and increasing smokers; therefore, all these factors are expected to increase the demand for such devices. These devices are portable and do not hinder the mobility of patients and enable them to shift them within the ward or transfer from one hospital to another. Advanced healthcare infrastructure and favorable reimbursement policies allow a high adoption of these devices, thereby expecting to drive the market growth in developed economies during the forecast period.

The study considers the present scenario of the global multiparameter patient monitoring market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

#### Multiparameter Patient Monitoring Market: Segmentation

This research report includes a detailed segmentation by devices, acuity level, patient group, end-user, and geography. The portable monitoring devices segment is likely to grow at the fastest CAGR during the forecast period. The ease of remotely monitoring and the availability of portable features are expected to increase their application in-home care settings and enable real-time vital signs monitoring. These devices reduce continuous monitoring costs and decrease frequent hospital visits. There has been increased adoption of advanced RPM platforms in the remote healthcare market. The demand for real-time, remotely, and continuous patient monitoring is adding new dimensions to the global telehealth market. Moreover, the usage of portable systems enables hospitals to shift the patient from intense care units to normal wards without switching off multiparameter patient monitor systems.

The launch of advanced portable monitoring devices is likely to hinder the growth of fixed devices. Fixed monitors are majorly used in hospitals and ASCs. These devices limit the mobility of patients and are less preferred by healthcare providers. These types of devices have a high risk of losing data during power outages. Hence, these devices are less preferred and are expected to experience steady growth in the market.

The high-acuity segment is likely to grow due to the growth in the occurrence of chronic diseases that require continuous monitoring. The demand for high-acuity monitors is expected to increase as patient monitoring in high-acuity conditions is a major priority for healthcare providers. However, these systems have a limitation due to restricted area usage and are only used in ICUs and operation theaters. Hence, there is a lower

demand than low-acuity devices.

The mid-acuity level is expected to grow at the slowest rate on account of the low availability of vendors offering such monitors. These types of monitors are used in ambulances, and the patient's condition is unpredictable in such circumstances. Hence, ambulances prefer high-acuity monitors over mid-acuity, which is likely to impact the sale of these devices adversely.

The low-acuity level segment is expected to grow at the fastest rate. The growth is majorly driven due to the low cost of low-acuity monitors, which is expected to bolster the demand for these devices from developed and developing regions. These monitors are portable and offer advanced features of RPM that enable healthcare professionals to monitor the patient continuously. Hospitals are likely to emerge as the major end-user for these advanced feature monitors due to their cost-effectiveness.

The geriatric group segment dominates the segment and is expected to grow at the fastest rate because of the increasing elderly population that is vulnerable to chronic diseases and often requires immediate medical interventions. According to the WHO, there were around 962.3 million people aged 60 and above in 2017, and the number is expected to reach 2,080.5 million by 2050 globally, which is expected to impact the segment positively. The increasing number of premature births is likely to lead to the demand for pediatric multiparameter patient monitoring equipment. Around 15 million babies are born prematurely throughout the globe annually, and the number is growing YOY. These systems enable healthcare professionals to monitor heart rates, respiration levels, and vital organs to ensure the healthy growth of premature infants. The adult group segment is expected to grow gradually due to the increasing prevalence of chronic diseases such as diabetes, cancer, and asthma in the adult population. The change in lifestyle patterns, lack of physical activities, and the increasing work-related stress both in developed as well as developing countries are likely to promote the sales of these devices.

The hospital segment is expected to grow during the forecast period due to the usage of patient monitoring devices in the emergency care setting, surgical units, and special wards to monitor the health condition regularly. The home care setting segment is expected to grow at a steady rate on account of the increasing awareness and adoption of home care monitoring systems. These devices enable to monitor vital signs at home and avoid regular hospital visits. This is considered to reduce hospital costs and help individuals to monitor their health regularly. Ambulatory surgery centers (ASCs) are likely to grow at the fastest rate as these centers are cost-effective and offer high-quality

care with a minimal indirect treatment cost. Chronic disease patients that do not have insurance coverage are expected to prefer these healthcare settings over hospitals. The cost of surgeries in these centers is also significantly low than in hospitals. Hence, the demand for same-day discharge (SDD) procedures is rapidly increasing, and the demand for access to multiparameter patient monitoring devices is likely to increase in these centers.

### Market Segmentation by Devices

Portable/Compact

Fixed

### Market Segmentation by Acuity Level

High Acuity

Mid Acuity

Low Acuity

### Market Segmentation by Patient Group

Geriatric Group

Adult Group

Pediatric Group

### Market Segmentation by End-user

Hospitals

ASCs

Homecare Settings

Others

## Insights by Geography

In 2019, North America dominated the market. The region is expected to grow at a steady pace due to the increasing old age population, the moderate increase in the ICU admission, and the availability of advanced technology for RPM. The presence of a large pool of population with several chronic diseases, coupled with high acceptance of advanced and innovative multiparameter patient monitoring devices, is likely to support the region's dominance in the global market. Europe is expected to gradually grow on account of the rising incidence of chronic diseases. There are likely to be more than 50 million people in Europe having more than one chronic disease. Germany, France, the UK, Italy, and Spain are the major revenue contributors to the European market. The high awareness levels of the availability of multiparameter monitoring devices, an increase in R&D investment for the development of innovative devices, and growing technological advancements in new product approvals/launches are expected to offer a positive impact on growth during the forecast period. The APAC region is expected to witness rapid growth during the forecast period. India and China together have a significant population with chronic diseases such as cancer and diabetes. The incidence of cancer in China and India was 4,285,033 and 1,157,294, respectively, in 2018. China is the major revenue contributor to the multiparameter patient monitoring market in APAC. Japan, India, South Korea, and Australia are expected to witness the significant growth rate because of the rise in healthcare expenditure and favorable public and private initiatives for an increase in healthcare access.

## Market Segmentation by Geography

North America

US

Canada

Europe

Germany

France

UK

Italy

Spain

APAC

Japan

China

India

South Korea

Australia

Latin America

Brazil

Mexico

Argentina

MEA

Turkey

Saudi Arabia

South Africa

## **Insights by Vendors**

The market is highly competitive and characterized by the presence of global, regional, and local players offering multi-parameter patient monitoring devices. Key players are expected to maintain a strategic focus on North America and Europe as they are the top two major revenue contributors. Leading players are likely to focus on expanding portable/compact multiparameter monitors product portfolio as the demand for such devices is expected to increase among end-users. Local manufacturers, in particular, Chinese and Japanese manufacturers, are expected to offer stiff competition to global players. The market is likely to witness technological advancements and significantly affect new product launches. Global players are focusing on developing innovative products and expanding their product portfolio to remain competitive in the market. They are expected to invest extensively in R&D and product development related activities.

#### Key Vendors

NIHON KOHDEN

Koninklijke Philips

OSI Systems

Shenzhen Mindray Bio-Medical Electronics

GE Healthcare

#### Other Vendors

Contec Medical Systems

Dr?gerwerk

AS-Motor

EPSIMED

GUANGDONG BIOLIGHT MEDITECH

Kizlonmedical

Lutech Industries

Mediana

MEDION HEALTHCARE

Opto Circuits (India)

SCHILLER

Skarray Technologies

## **Key Market Insights**

The analysis of the multiparameter patient monitoring market provides sizing and growth opportunities for the forecast period 2020–2025.

Offers sizing and growth prospects of the multiparameter patient monitoring market for the forecast period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the multiparameter patient monitoring

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.



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