

Wearable Patches Market - A Global and Regional Analysis: Focus on Usage Type, Application, End User, and Region - Analysis and Forecast, 2023-2031

<https://marketpublishers.com/r/W569811F4DB1EN.html>

Date: September 2023

Pages: 294

Price: US\$ 5,500.00 (Single User License)

ID: W569811F4DB1EN

Abstracts

Introduction to the Global Wearable Patches Market

The global wearable patches market was valued at \$10,462.4 million in 2022 and is expected to reach \$26,892.7 million by 2031, growing at a CAGR of 10.19% between 2023 and 2031. The key factors driving the growth of the global wearable patches market include continuous monitoring of body vitals and minimum interference with body movement, increasing prevalence of chronic disorders (diabetes, strokes, etc.), rising technological advancement, and a growing geriatric population.

Wearable Patch: Introduction

Wearable patches represent a revolutionary advancement in the field of healthcare technology, offering a compact and non-invasive solution for monitoring various physiological parameters and delivering therapeutic interventions. These innovative patches are designed to adhere comfortably to the skin, providing continuous real-time data collection, analysis, and communication with healthcare professionals or individuals themselves.

Industrial Impact

Wearable patches have made an impact on the healthcare industry in the following ways:

Remote Patient Monitoring: Wearable patches are transforming healthcare by enabling continuous remote monitoring of patients with chronic illnesses. This reduces hospital

readmissions, lowers healthcare costs, and improves patient outcomes.

Clinical Trials: Pharmaceutical companies and research organizations use wearable patches to collect real-time data from participants in clinical trials. This streamlined data collection enhances trial efficiency and provides more accurate insights into drug effectiveness and safety.

Elderly Care: Wearable patches play a crucial role in elderly care by providing caregivers and healthcare providers with valuable insights into the health and well-being of older adults. This technology can help prolong independent living and reduce the burden on caregivers.

Personalized Care for Patients: The data generated by wearable patches fuel the data analytics and AI industries. These technologies are used to process and interpret the vast amounts of health-related data collected from wearable medical patches, leading to insights for personalized healthcare.

Impact of COVID-19

The impact of COVID-19 on the global wearable patches market was as follows:

Increased Interest in Remote Monitoring: The pandemic has accelerated the adoption of remote patient monitoring solutions, including wearable technology. Healthcare providers sought ways to minimize in-person visits, and wearable patches emerged as a valuable tool for monitoring COVID-19 patients and individuals with chronic illnesses from a distance.

Growth in Telehealth and Telemedicine: Wearable patches have become integral to telehealth and telemedicine services, which experienced significant growth during the pandemic. These patches enable real-time monitoring of patients during virtual consultations, enhancing the quality of remote healthcare.

Demand for Early Warning Systems: Healthcare institutions and governments have shown interest in wearable patches as early warning systems for COVID-19 symptoms. These patches can monitor vital signs, including body temperature and respiratory rate, which are crucial indicators of infection.

Regulatory Considerations: Regulatory agencies, such as the U.S. Food and Drug Administration (FDA), revised their policies to facilitate the rapid deployment of remote

monitoring solutions, including wearable patches, during the public health emergency.

Market Segmentation:

Segmentation 1: by Usage Type

Blood Glucose Patch

Heart Rate and ECG Patch

Temperature Patch

TENS/EMS Patch

Others

Blood Glucose Patches Dominate the Global Wearable Patches Market

Blood glucose patches are innovative medical devices designed for continuous monitoring of blood sugar levels in individuals with diabetes. These patches offer several advantages over traditional glucose monitoring methods, such as fingerstick tests. Some of its advantages are as follows:

Continuous Monitoring: Blood glucose patches provide real-time, continuous data on blood sugar levels. This constant monitoring helps individuals and healthcare providers make timely and informed decisions regarding insulin dosages, dietary choices, and overall diabetes management.

Minimized Discomfort: Unlike frequent fingerstick tests, which can be painful and inconvenient, wearable devices offer a more comfortable and non-invasive way to monitor blood glucose levels. They eliminate the need for frequent needle pricks.

Convenience: Wearable patches are discreet and can be worn underneath clothing, allowing individuals to monitor their glucose levels without drawing attention to themselves. This convenience encourages regular monitoring and adherence to treatment plans.

Data Trends: Blood glucose patches often come with accompanying mobile apps or

software that display historical data and trends. This information can help individuals and healthcare providers identify patterns, adjust treatment plans, and improve diabetes management over time.

Alerts and Alarms: Many wearable patches are equipped with customizable alerts and alarms, sending timely notifications. These notifications can warn individuals of potential hypoglycemia (low blood sugar) or hyperglycemia (high blood sugar) episodes, enabling prompt action.

Segmentation 2: by Application

Monitoring and Diagnostics

Therapeutics

Monitoring and Diagnostics to be the Major Application in the Global Wearable Patches Market

Wearable patches are widely used for the monitoring and diagnosis of vital parameters such as blood pressure, pulse rate, and blood glucose levels. These are equipped with numerous sensors which can adhere to the skin using a skin adhesive. These patches are usually non-invasive, so they are patient-friendly as well.

Patches such as blood glucose patches, heart rate and ECG patches, temperature patches, and others are used for monitoring and diagnosis of various conditions. For instance, different key players operating in the market are providing products with unique value propositions such as long battery life, easy recharge, and maintenance. These patches provide real-time feedback on a person's health condition and are used to monitor chronic disease conditions.

Segmentation 3: by End User

Homecare

Ambulatory Surgical Center

Homecare Segment to Continue to Dominate the Wearable Patches Market

Remote healthcare monitoring provides an efficient and cost-effective alternative to on-site clinical monitoring and allows the patient to continue to stay at home and prevent costly treatments from hospitals, clinics, or other nursing homes.

Segmentation 4: by Region

North America - U.S., Canada

Europe - Germany, U.K., France, Italy, Spain, and Rest-of-Europe

Asia-Pacific - Japan, India, China, South Korea, Australia and New Zealand, and Rest-of-Asia-Pacific

Latin America - Brazil, Mexico, and Rest-of-Latin America

Middle East and Africa - U.A.E., K.S.A., and Rest-of-Middle East and Africa

China dominated the Asia-Pacific wearable patches market in 2022 with a share of 23.10%. The China wearable patches market is driven by factors such as an increase in the prevalence of chronic disease. Moreover, other factors, such as the rising technological advancements in connected care and the growing demand for remote patient monitoring, are also expected to drive the growth of the market in China.

Recent Developments in the Global Wearable Patches Market

In August 2023, Theranica Bio-Electronics Ltd. received expanded CE mark approval under MDR European regulation for Nerivio as dual-use therapy for both acute and preventive treatment of migraine for adults and adolescents. The CE mark expansion for Nerivio is a critical milestone to accelerate the availability of the novel, drug-free migraine device into the European market.

In June 2023, Abbott Laboratories announced that the U.S. Food and Drug Administration (FDA) cleared its FreeStyle Libre 2 and FreeStyle Libre 3 integrated continuous glucose monitoring (iCGM) system sensors for integration with automated insulin delivery (AID) systems.

In June 2023, Insulet Corporation announced the commercial launch of its

Omnipod 5 Automated Insulin Delivery System (Omnipod 5) for individuals aged two years and older with type 1 diabetes (T1D) in the U.K.

In April 2023, the Medicare program expanded access to continuous glucose monitoring systems such as the FreeStyle Libre 2 and the FreeStyle Libre 14-day for insulin-using Medicare beneficiaries with diabetes, removing the prior requirement of multiple insulin injections on a daily basis.

Demand – Drivers, Limitations, and Opportunities

Market Drivers:

Continuous Monitoring and Minimum Interference with Body Movement for Measurement of Vital Signs of Patients: Continuous monitoring, also known as continuous control monitoring (CCM), gives protection and operations analysts immediate information on the general condition of IT infrastructure, including networks and cloud-deployed apps. The purpose of continuous monitoring and the rationale behind its adoption by businesses is to improve the system activity visibility and accountability.

There are many wearable patches that can measure vital indicators, including heart rate, respiration rate, oxygen saturation, and blood pressure. Compared to the hospital monitoring equipment used today, these gadgets are smaller and more user-friendly, accurate, and trustworthy.

Increasing Prevalence of Chronic Disorders (Diabetes, Strokes, etc.): Globally, the prevalence rate of illnesses and ailments is rising. These prevalent and expensive long-term health issues are steadily on the rise because of population aging and cultural and behavioral changes. Pandemics around the world are another growing epidemic. The pandemics of the last 10 years have amply illustrated how quickly illnesses spread over the world. The increase in chronic diseases will keep driving the market as the demand for continuous monitoring will turn out to be a necessity in the future.

Rising Technological Advancement (Increased Connectivity with Cell Phones and Precise Data): A wide variety of wearable technologies that can be used in healthcare have been developed with the help of the lifestyles and fitness markets. The four main vital signs, namely, temperature, heart rate, respiration rate, and blood pressure, as well as physical activity, perspiration, and emotion, are currently measured using existing

technologies.

Devices that are small enough to be worn on a wrist as a penny-sized patch, sensors, and artificial intelligence (AI) advancements are assisting millions of people in detecting and managing chronic health issues and preventing serious sickness.

Growing Geriatric Population: The growing geriatric population across the globe is another factor responsible for driving the growth of the global wearable patches market. Chronic diseases are more common in the geriatric population.

Market Challenges:

High Cost and Lack of Adequate Reimbursement Limiting the Adoption of Wearable Medical Patches: The lack of adequate reimbursement policies and the high cost of wearable patches are among the major factors restraining the global wearable patches market. Many countries in regions such as Latin America the Middle East and Africa do not have established guidelines to regulate the use of wearable patches and, therefore, do not have reimbursement policies surrounding such devices.

Concerns Regarding Data Privacy and Security of the Data Collected from Wearable Patches: A lot of wearable technologies store information locally without encryption or information protection. As a result, there may be a significant chance of losing private and personal health information. Wireless communication methods that lack encryption are insufficient to protect data from a brute-force attack.

Market Opportunities:

End-to-End Platform for Services: The wearable patches have normally been integrated with platforms to save the monitored data. Fully labeled datasets are used to train supervised learning algorithms, which can then generate predictions about fresh data. The relationship between inputs and outcomes may be predicted and assessed using a clear framework.

AI Algorithms for Wearable Patches for Better Clinical Outcomes: A massive amount of data is being generated from tracking an individual's vital parameters, including heart rate, temperature, and oxygen level, among other health parameters. These data generated from wearable patches are being collected with the software. The use of AI helps understand each patient's body and alerts the physician if any change in the vital signs of the patient is being observed. Further incorporation of machine learning helps

to develop a profile of each individual's vital signs.

How can this report add value to an organization?

Product/Innovation Strategy: The global wearable patches market has been extensively segmented on the basis of various categories, such as usage type, application, end user, and region. This can help readers get a clear overview of which segments account for the largest share and which ones are well-positioned to grow in the coming years.

Growth/Marketing Strategy: Regulatory activities and partnerships accounted for the maximum number of key developments, i.e., around 60% of the total developments in the global wearable patches market, as of August 2023.

Competitive Strategy: The global wearable patches market has both established as well as emerging companies offering wearable patches across a range of usage types. Key players in the global wearable patches market that are analyzed and profiled in the study involve established players that offer various kinds of wearable patches.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

Detailed secondary research has been performed to ensure maximum coverage of manufacturers/suppliers operational in a country.

Exact revenue information, up to a certain extent, has been extracted for each company from secondary sources and databases. The revenues specific to product/service/technology were then estimated for each market player based on fact-based proxy indicators as well as primary inputs.

The scope of this report has been carefully derived based on interactions with experts in different companies across the world. This report provides a market study of wearable patches.

The market contribution of wearable patches anticipated to be launched in the future has been calculated based on the historical analysis of the offerings. This analysis has been supported by proxy factors such as the innovation scale of the companies, the status of funding, collaborations, customer base, and patent scenario.

The scope of availability of the offerings in a particular region has been assessed based on a comprehensive analysis of companies' prospects, the regional end-user perception, and other factors impacting the launch of offerings in that region.

The base year considered for the calculation of the market size is 2022. A historical year analysis has been done for the period FY2018-FY2021. The market size has been estimated for FY2022 and projected for the period FY2023-FY2031.

Revenues of the companies have been referenced from their annual reports for FY2021 and FY2022. For private companies, revenues have been estimated based on factors such as inputs obtained from primary research, funding history, product approval status, market collaborations, and operational history.

Regional distribution of the market revenue has been estimated based on the companies in each region and the adoption rate of wearable technologies. All the numbers have been adjusted to a single digit after the decimal for better presentation in the report. However, the real figures have been utilized for compound annual growth rate (CAGR) estimation. The CAGR has been calculated for the period 2023-2031.

The market has been mapped based on the available wearable patches across different usage types. All the key companies with significant offerings in this field have been considered and profiled in this report.

Market strategies and developments of key players have been considered for the calculation of the potential of the market in the forecast period.

Patent expiration analysis assumes that the rate of new patent filings remains the same during the forecast period.

Primary Research: The primary sources for this study include industry experts and leading manufacturers of wearable patches in the market. To build both qualitative and quantitative expertise in wearable patches, BIS Research has interviewed marketing heads, product managers, and sales managers from key vendors to understand the demand side.

The following are the key data points that were taken from primary research:

Validation and triangulation of all the numbers and graphs

Validation of the report's segmentation and key qualitative findings

Understanding the competitive landscape

Validation of product type and its features

Validation of the numbers of different segments of the market in focus

Percentage split of individual markets for regional analysis

Secondary Research

Open Sources

SEC filings of the leading market players

Company websites and detailed study of their product portfolios

Annual reports and investor presentations of the key players in the market

Magazines, journals, whitepapers, press releases, and news articles

World Intellectual Property Organization (WIPO), Food and Drug Administration (FDA), Center for Disease Control and Prevention (CDC), World Health Organization (WHO), PubMed, and National Center for Biotechnology Information (NCBI)

International Diabetes Federation

American Heart Association

Forum of Artificial Intelligence in Medicine

Institute of Electrical and Electronics Engineers

The key data points taken from the secondary sources include:

Segmentation and percentage share estimates

Company and country-related data for market value estimation

Key industries/market trends

Developments among top players

Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

Quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

The top segment players who are leading include manufacturers of different kinds of wearable medical patches. The blood glucose patches captured around 82.23% of the presence in the market in 2022. This was followed by the heart rate and ECG patches, which accounted for approximately 9.47% of the presence in the market in 2022.

Key Companies Profiled:

Established Companies

Abbott Laboratories

Bittium Corporation

Boston Scientific Corporation

iRhythm Technologies, Inc.

Koninklijke Philips N.V.

Masimo Corporation

Medtronic plc

OMRON Corporation

SENSEONICS HOLDINGS, Inc.

Emerging Companies

Alio, Inc.

AliveCor Inc.

BioIntellisense, Inc.

Samay

Theranica Bio-Electronics Ltd.

VitalConnect Inc.

VivaLNK Inc.

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