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Global Bed Exit Monitoring System Market Growth 2026-2032

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Abstracts

The global Bed Exit Monitoring System market size is predicted to grow from US$ 179 million in 2025 to US$ 287 million in 2032; it is expected to grow at a CAGR of 7.1% from 2026 to 2032.

Bed Exit Monitoring System refers to a patient safety monitoring device or integrated system designed to identify whether a patient or care recipient is lying in bed, sitting up, moving toward the bed edge, leaving the bed, or remaining out of bed beyond a preset period, and to transmit an alert to caregivers. A standard system generally consists of a bed-side sensing unit, signal-processing or control hardware, an alarm device or communication interface, and basic monitoring software. Commercial products use pressure-sensitive pads, pneumatic sensing, load cells, piezoelectric micro-vibration sensing, radar, infrared sensing, optical vision, and other sensing technologies. Systems may be installed above or below the mattress, integrated into the bed structure, or mounted externally within the room. Bed Exit Monitoring System products are primarily deployed in hospitals, nursing and long-term care facilities, assisted living communities, community care centers, and home care settings to support fall prevention, unattended bed-exit detection, nighttime supervision, and more efficient allocation of nursing resources.

Key Findings

2025 global shipments reached approximately 430 thousand sets

2026 global shipments are estimated at 451 thousand sets

Average selling price was approximately US$425 per system in 2025

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Pressure-based systems remain the largest technology segment globally

Institutional care accounts for the majority of installed demand

Market Trends

The Bed Exit Monitoring System market is shifting from simple pressure-pad alarms toward multi-stage, connected patient safety platforms. Traditional products mainly detect weight removal after a patient has already left the mattress, while newer systems can identify body movement, sitting up, bed-edge positioning, and prolonged absence before or immediately after an exit event. Radar, optical vision, micro-vibration sensing, load-cell measurement, and intelligent mattress technologies are expanding the range of non-contact and low-contact monitoring options. Product development is increasingly focused on reducing false alarms, protecting patient privacy, supporting wireless installation, and integrating with nurse call systems, mobile applications, central monitoring stations, and remote care platforms. Customers are also moving from purchasing isolated alarm devices toward evaluating system-level performance, including workflow integration, alarm escalation, multi-bed management, software usability, and long-term maintenance requirements. This transition is gradually increasing the value of each monitored bed even though lower-priced pressure-based systems continue to account for the largest shipment volume.

Market Dynamics

Drivers

Demand is primarily supported by population aging, the increasing number of patients with mobility limitations or cognitive impairment, and continued pressure on hospitals and long-term care facilities to reduce preventable falls. Nursing staff shortages are strengthening demand for monitoring tools that can identify high-risk bed-exit behavior without continuous bedside observation. The expansion of smart hospitals, digital nursing systems, and connected elderly care infrastructure is also improving the commercial environment for networked Bed Exit Monitoring System products. In addition, the availability of lower-cost pressure systems and higher-performance radar, intelligent mattress, and vision-based systems enables suppliers to address customers with different budgets and clinical requirements.

Restraints

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Market expansion is limited by budget constraints in hospitals and elderly care institutions, particularly where purchasing decisions are based on the initial hardware price rather than total nursing efficiency. Pressure pads and other contact-based components may require periodic replacement due to wear, cleaning, and hygiene requirements, increasing lifetime ownership costs. Advanced radar and optical systems have higher initial prices and may require software subscriptions, communication infrastructure, or integration services. False alarms, poor sensor positioning, incompatible interfaces, and inconsistent operating procedures can also reduce user confidence and delay broader deployment.

Opportunities

The strongest opportunities are emerging in predictive bed-exit monitoring, non-contact sensing, multi-bed central management, and integrated nursing workflow platforms. Radar and privacy-preserving optical systems can expand adoption in facilities that are concerned about wearable compliance or camera privacy. Intelligent mattresses and under-mattress sensors provide opportunities to combine bed-exit monitoring with respiratory rate, heart rate, body movement, sleep condition, and pressure-injury risk monitoring. Emerging elderly care markets in Asia-Pacific also offer expansion potential as institutional care capacity increases and operators adopt digital monitoring tools. Home care remains less penetrated but presents a broad long-term opportunity through simpler installation, remote caregiver notification, and subscription-based service models.

Challenges

The industry lacks a fully unified standard for bed-exit event definitions, alarm sensitivity, predictive accuracy, false-alarm measurement, and interoperability with nurse call systems. Products using different sensing technologies may report similar functions but deliver materially different performance under changes in patient weight, mattress type, room layout, movement patterns, or caregiver workflow. Manufacturers must also manage privacy, cybersecurity, wireless reliability, clinical validation, and regional medical device requirements. Market fragmentation makes customer education and channel development costly, while increasing competition from broader virtual nursing, fall detection, smart bed, and patient monitoring platforms may blur the independent value proposition of Bed Exit Monitoring System products.

Industry Chain Analysis

The upstream industry chain consists of pressure-sensitive materials, pneumatic

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components, load cells, piezoelectric films, radar modules, infrared and optical sensors, microcontrollers, wireless communication modules, medical-grade textiles, plastic housings, power components, and cloud or embedded software tools. Component requirements vary significantly by technology. Traditional pressure systems depend more heavily on sensor pads, cables, alarm controllers, and replaceable consumables, while radar and optical systems require higher-value sensing modules, edge-computing hardware, algorithms, and software development.

Midstream companies design, manufacture, integrate, and validate complete Bed Exit Monitoring System products. Their value creation increasingly depends on detection accuracy, false-alarm reduction, software usability, compatibility with nursing infrastructure, and after-sales support rather than hardware cost alone. Downstream customers include hospitals, nursing facilities, assisted living operators, community care providers, home care agencies, and individual caregivers. Hardware components represent a substantial share of cost for basic systems, while advanced systems allocate more value to algorithms, software, certification, integration, and recurring service. Suppliers capable of combining reliable sensing hardware with nursing workflow integration generally have stronger customer retention and higher per-bed revenue potential.

Segment Insights

Pressure-sensitive pad systems remain the largest technology segment and are estimated to represent approximately half of market value in 2026. Their leading position is supported by simple operation, relatively low purchase prices, established procurement channels, and broad use in hospitals, nursing facilities, and home care. However, this segment faces relatively mature demand, frequent pad replacement, and stronger price competition. Pneumatic and infrared systems serve more specialized requirements and are likely to remain comparatively smaller categories.

Smart mattress, load-cell, and piezoelectric micro-vibration systems collectively account for roughly 30% of market value, supported by their ability to monitor bed occupancy, movement, and selected physiological signals without requiring a visible bedside alarm pad. Radar and optical vision systems account for a smaller share of current demand, estimated at around 20%, but represent the most active technology upgrade direction. These products offer stronger opportunities in predictive alerts, non-contact monitoring, centralized analytics, and integration with broader digital nursing platforms. Products with unclear primary sensing technology or equally weighted multi-sensor configurations remain within the Other Sensing Systems category.

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Downstream Market Opportunities

Hospitals and nursing and long-term care facilities remain the principal downstream markets because they manage the highest concentration of patients at risk of unattended bed exits and falls. Acute care customers place greater emphasis on nurse call integration, rapid alarm delivery, cleaning requirements, and compatibility with existing beds, while long-term care operators focus more on continuous nighttime supervision, multi-bed monitoring, ease of use, and staffing efficiency. Assisted living and community care facilities offer opportunities for lower-complexity connected systems, while home care demand is supported by aging in place and the need for remote family notification. The largest commercial opportunity is shifting toward products that can reduce unnecessary caregiver checks while reliably identifying patients who require timely assistance.

Regional Insights

North America is assessed as the largest regional market, supported by established fall-prevention purchasing practices, a large base of nursing and residential care beds, mature medical device distribution, and widespread use of pressure-pad and nurse-call-connected systems. The region also has an active group of AI patient monitoring and predictive bed-exit technology companies, allowing advanced solutions to coexist with traditional lower-cost products. Europe has a strong presence in telecare, remote monitoring, and institutional elderly care, with particularly developed supplier clusters in the United Kingdom, Germany, the Nordic countries, the Netherlands, and Switzerland.

Asia-Pacific is expected to show the strongest expansion in installed demand. Japan has a mature specialist supplier base and a well-established product category for bed-exit sensors, while China is developing rapidly in intelligent mattresses, piezoelectric monitoring, radar sensing, and elderly care platforms. China Taiwan has strengths in pressure arrays, fiber-optic sensing, intelligent mattress systems, and electronics manufacturing. South Korea, Singapore, and India remain smaller markets but are contributing new radar, AI monitoring, and under-mattress sensing solutions. Regional growth will depend on elderly care investment, hospital digitalization, local reimbursement conditions, and customer acceptance of software-based monitoring.

Competitive Landscape Analysis

The Bed Exit Monitoring System market remains fragmented, with competition divided among traditional fall-prevention equipment manufacturers, intelligent mattress and

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physiological monitoring suppliers, radar and optical AI companies, nurse call and telecare groups, and smart bed manufacturers. Traditional suppliers compete through product reliability, low cost, established distribution channels, and compatibility with installed nursing infrastructure. Technology-focused companies differentiate through predictive detection, non-contact monitoring, reduced false alarms, centralized analytics, and integration with digital nursing workflows. Smart bed manufacturers benefit from embedding monitoring functions directly into bed platforms but must separate the value of the monitoring module from the broader bed system. Regional specialists remain important because purchasing standards, care workflows, communication interfaces, and regulatory requirements differ by market. The competitive advantage of leading suppliers is increasingly determined by a combination of sensing accuracy, system integration, clinical usability, product certification, channel coverage, and recurring software or service capabilities rather than by sensor hardware alone.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Bed Exit Monitoring System Industry Forecast” looks at past sales and reviews total world Bed Exit Monitoring System sales in 2025, providing a comprehensive analysis by region and market sector of projected Bed Exit Monitoring System sales for 2026 through 2032. With Bed Exit Monitoring System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Bed Exit Monitoring System industry.

This Insight Report provides a comprehensive analysis of the global Bed Exit Monitoring System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Bed Exit Monitoring System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Bed Exit Monitoring System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Bed Exit Monitoring System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Bed Exit Monitoring System.

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This report presents a comprehensive overview, market shares, and growth opportunities of Bed Exit Monitoring System market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Pressure-Sensitive Pad Systems

Pneumatic Sensing Systems

Load-Cell Sensing Systems

Piezoelectric Micro-Vibration Sensing Systems

Radar Sensing Systems

Infrared Sensing Systems

Optical Vision Sensing Systems

Other

Segmentation by Primary Sensor Position:

On-Mattress Sensor Systems

Under-Mattress Sensor Systems

Bed-Integrated Sensor Systems

Room-Based External Sensor Systems

Other

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Segmentation by Application:

Hospitals

Nursing and Long-Term Care Facilities

Assisted Living and Community Care Facilities

Home Care

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

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- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa
  - Egypt
  - South Africa
  - Israel
  - Turkey
  - GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

- Smart Caregiver Corporation
- Curbell Medical Products, Inc.
- TIDI Products, LLC
- Securitas Healthcare LLC
- Personal Safety Corporation

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RF Technologies, Inc.

VirtuSense Technologies, Inc.

Telehealth Sensors LLC

Baxter International Inc.

Cognito Health Corp.

Momo Medical Inc.

Crest Healthcare Supply

Frequency Precision Ltd.

Tunstall Healthcare Group Limited

Legrand S.A.

TeleAlarm Europe GmbH

Abilia AB

Emfit Ltd.

Alerta Medical Ltd

Medpage Ltd

QUMEA AG

Neteera Technologies Ltd.

Sensio AS

Kepler Vision Technologies B.V.

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Careium AB

Vayyar Imaging Ltd.

LINET Group SE

Stiegelmeyer GmbH & Co. KG

Sensor IT Ltd.

Chiptech International Limited

PARAMOUNT BED HOLDINGS CO., LTD.

Technos Japan Co., Ltd.

Hotron Co., Ltd.

BioSilver Co., Ltd.

Excel Engineering Co., Ltd.

HAKARU PLUS Corporation

PLATZ Co., Ltd.

F.S.C Co., Ltd.

CARECOM CO., LTD.

NIPRO CORPORATION

SEKISUI CHEMICAL CO., LTD.

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Seahonence Inc.

Hanwei Electronics Group Corporation

Shenzhen LonBon Technology Co., Ltd.

Shenzhen Medica Technology Development Co., Ltd.

Suzhou Yidianyuan Shengwu Keji Youxian Gongsi

DewertOkin Technology Group Co., Ltd.

Shenzhen Willing Technology Co., Ltd.

Shenzhen Quantum Wisdom Technology Co., Ltd.

Guangdong Flexwarm Advanced Materials & Technology Co., Ltd.

Shanghai Renwei Electronics Technology Co., Ltd.

Shenzhen Hua'antai Intelligent Technology Co., Ltd.

Shenzhen Plus1Health Technology Co., Ltd.

Beijing Haisiruige Technology Co., Ltd.

Shenzhen Guowei Yixin Technology Co., Ltd.

Hunan ZENNZE Technology Co., Ltd.

Mengxiang Lingyu Chengdu Technology Co., Ltd.

Hangzhou Bobo Technology Co., Ltd.

Xiamen Milesight IoT Co., Ltd.

MWG Technologies Co., Ltd.

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ForeAider Technology Co., Ltd.

Huijia Health Life Technology Co., Ltd.

Uneo Inc.

Humetrics Inc.

SEDA G-Tech Co., Ltd.

RANiX Inc.

Sys4Care Co., Ltd.

Turtle Shell Technologies Pvt. Ltd.

Rondish Company Limited

Hanshin Technology Limited

SmartPeep Pte. Ltd.

Bed Assist Pty Ltd.

Invisa-Beam International Pty Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Bed Exit Monitoring System market?

What factors are driving Bed Exit Monitoring System market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Bed Exit Monitoring System market opportunities vary by end market size?

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How does Bed Exit Monitoring System break out by Type, by Application?

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