

# **Diagnostic Electrocardiograph Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product Type (Resting ECG Devices, Stress ECG Devices, Holter Monitors, Others), By Channel (12-channel, 6-channel, 5- channel, 3- channel, Single- channel), By End User (Hospitals & Clinics, Ambulatory Surgical Centers, Cardiac Care Centers, Others), By Region and Competition**

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## **Abstracts**

In 2022, the Global Diagnostic Electrocardiograph Market reached a valuation of USD 7.89 Billion, and it is poised to demonstrate impressive growth during the forecast period, maintaining a robust Compound Annual Growth Rate (CAGR) of 7.55% through 2028. Diagnostic electrocardiogram (ECG) is a medical device employed to capture the electrical activity of the heart in waveforms, achieved by placing electrodes in contact with the chest. These waveforms are subsequently amplified and displayed on an ECG monitor. The analysis of these waveforms plays a pivotal role in the identification of various cardiac conditions, including atrioventricular reentrant tachycardia, arrhythmia, and symptoms indicative of acute coronary syndrome.

Conversely, an implantable loop recorder (ILR) represents a cardiac monitoring device that is surgically implanted beneath the skin of the chest. It serves various monitoring purposes, encompassing the evaluation of the underlying causes of symptoms such as fainting, palpitations, abnormal heartbeats, and concealed rhythms that can precipitate strokes.

The burgeoning prevalence of cardiovascular diseases and lifestyle-related disorders, including ischemic heart disease (IHD), hypertensive heart disease, stroke, and peripheral artery disease, is anticipated to act as a catalyst for the growth of the Diagnostic ECG industry. Additionally, factors such as the expanding geriatric population, improvements in healthcare infrastructure, and favorable reimbursement policies are expected to contribute significantly to the expansion of the diagnostic ECG market.

## Key Market Drivers

### High Prevalence of Cardiovascular Diseases

Cardiovascular diseases (CVDs) such as heart attacks, arrhythmias, and heart failure are major causes of morbidity and mortality worldwide. Due to the increasing prevalence of these conditions, accurate diagnostic tools such as electrocardiograms (ECGs) are essential for timely intervention and treatment planning. The world's aging population, with its higher susceptibility to cardiovascular problems, underscores the need for diagnostic ECG devices to monitor and manage cardiac health effectively. As individuals age, their risk of heart-related disorders escalates, creating a steady demand for advanced ECG devices capable of providing accurate readings.

Continuous technological advancements in ECG devices have led to improved accuracy, ease of use, and enhanced connectivity features. The integration of wireless monitoring, cloud-based data storage, and mobile applications has expanded the utilization of ECG systems in both clinical and home care settings. These advancements empower healthcare professionals to remotely monitor patients' cardiac health and facilitate prompt intervention, improving overall patient outcomes.

Furthermore, emerging economies are making substantial investments in healthcare infrastructure, including the establishment of diagnostic centers. This infrastructure expansion not only improves access to healthcare services but also creates opportunities for the widespread adoption of ECG devices. These advancements are particularly significant in areas where access to advanced medical technologies was previously limited, bridging the gap in healthcare disparities and improving the quality of care for underserved populations.

The increasing prevalence of cardiovascular diseases, the aging population, and continuous technological advancements in ECG devices are driving the demand for accurate diagnostic tools. The integration of wireless monitoring, cloud-based data

storage, and mobile applications, coupled with healthcare infrastructure expansion, opens up new avenues for the adoption of ECG devices globally, ensuring better monitoring and management of cardiac health for individuals around the world.

### Increasing Trend for Early Disease Detection

The increasing trend for early disease detection is expected to drive the growth of the diagnostic electrocardiograph market. In today's world, individuals are becoming more conscious about their health and are seeking better care and diagnostic treatments. This growing awareness and demand for quality healthcare services will further accelerate the expansion of the market.

It is important to note that symptoms of certain diseases may not persist in some patients; instead, they may be intermittent in nature. These intermittent symptoms have a tendency to come and go over time. In order to effectively monitor and diagnose such patients, healthcare providers often recommend the use of remote or continuous ECG machines. These devices allow for continuous monitoring of the heart rhythm throughout the day, providing valuable insights for accurate diagnosis and treatment planning.

By embracing advanced technologies and prioritizing early detection, the healthcare industry is paving the way for improved patient outcomes and better overall healthcare management. The diagnostic electrocardiograph market is poised to benefit from these advancements, as it plays a crucial role in facilitating timely and accurate diagnosis of cardiovascular conditions.

### Rising Cases of Diabetes

Diabetes and hypertension are significant risk factors that drive the demand for Diagnostic ECG equipment. Diabetes is often associated with other comorbidities that increase the risk of coronary heart disease. Prolonged high blood sugar levels can damage the arteries that regulate blood flow to the heart. The International Diabetes Federation (IDF) projects that the global number of diabetics will reach 700 million by 2045, up from 463 million in 2019. Additionally, the American Diabetes Association reports that 1.5 million Americans are diagnosed with diabetes annually in the United States alone. The prevalence of diabetes is on the rise, primarily due to the growing geriatric population. According to the American Diabetes Association, approximately 25% of all older adults in the United States have diabetes.

Moreover, the expanding incidence of diabetes in emerging countries, coupled with a significant geriatric population, presents substantial growth opportunities for the diagnostic ECG market. The IDF estimates that in 2019, 77.0 million individuals in India alone suffered from diabetes, and this number is projected to increase to 101.0 million by 2030. Similarly, China is expected to see a rise in diabetes cases from 116.4 million in 2019 to 140.5 million by 2030. Furthermore, the growing health awareness in these countries is likely to boost the demand for diagnostic ECGs.

### Increase in R&D Activities

The increase in research and development activities targeted at advanced technology for electrocardiograph devices is playing a significant role in driving the market forward. This surge is primarily fueled by the pressing need for new product development and innovation in designing electrocardiograph devices, which, in turn, contributes to the overall growth of the market. For instance, in 2020, AliveCor, a U.S.-based company, introduced the KardiaMobile 6L, a personal ECG device, to the Indian market, thereby further expanding accessibility to this advanced technology and fostering its adoption among patients. Moreover, the market is also witnessing the introduction of remote monitoring devices with single lead and portable ECG systems, which are expected to not only enhance patient care and monitoring but also accelerate the growth of the market. These technological advancements and the widening range of product offerings are revolutionizing the application and utilization of electrocardiograph devices, paving the way for improved patient outcomes and more effective monitoring of cardiac health.

### Key Market Challenges

#### Strict Product Approval Processes and Safety Regulations Enforced by The FDA

Manufacturers face numerous challenges when it comes to launching new diagnostic ECG devices. These challenges arise from the strict product approval processes and safety regulations enforced by the FDA. The FDA has implemented a rigorous regulatory framework for cardiac monitors, classifying ECG software applications as Class III devices and traditional diagnostic ECG devices as Class II devices based on risk factors.

The FDA's regulations serve an important purpose - to ensure that only safe and effective devices enter the market. However, these regulations can also lead to delays in the approval and launch of new products, impacting vendors' profitability. Compliance with regulations such as device description, performance testing, and in-vitro safety

testing is crucial for obtaining approval.

It's worth noting that mobile applications are also subject to regulatory scrutiny. In fact, mobile applications that fall under the category of 'mobile medical applications' are classified as Class III devices and undergo strict evaluation before receiving approval. Overall, the strict product approval processes and safety regulations enforced by the FDA present both challenges and opportunities for manufacturers of diagnostic ECG devices. Navigating these regulations while ensuring the development of innovative and effective products is a balancing act that requires expertise and adherence to regulatory requirements.

### High Costs of Diagnostic Electrocardiographs

ECG equipment, especially the advanced and feature-rich models, can often come with a hefty price tag, making it a significant financial barrier for healthcare facilities operating with limited budgets. This issue is particularly pronounced in resource-constrained regions, where the availability of funds for purchasing cutting-edge ECG technology may be scarce. Moreover, the stringent regulatory and quality standards that medical devices, including ECG equipment, must adhere to can further complicate the situation. Navigating the complex and ever-evolving regulatory landscape can potentially cause manufacturers to experience delays in product launches and face increased compliance costs, adding to the challenges faced by healthcare facilities.

The cost-effectiveness aspect of ECG technology poses a unique challenge for clinicians in many third-world nations. Due to the high costs associated with purchasing and maintaining the most advanced ECG devices, healthcare providers in these regions often find themselves working with older and less sophisticated ECG machines. This limitation not only hinders their ability to provide accurate and timely diagnoses but also restricts the potential growth of the diagnostic ECG market in emerging nations. Additionally, a lack of technical skills and resources further exacerbates the situation, making it difficult for healthcare providers to bridge the gap and embrace the latest advancements in ECG technology.

### Key Market Trends

#### Advancement in Technologies

Advanced technologies have significantly contributed to the increased sales of diagnostic ECG devices, thereby enhancing disease diagnosis and treatment. These

devices now integrate sophisticated technologies to streamline workflow, enhance flexibility, and improve portability, enabling physicians to position workstations conveniently during examinations. Continuous digitization has prompted vendors to enhance data connectivity for various management solutions, facilitating widespread access and interoperability with other software systems, including cloud and smartphones. Prominent vendors are dedicated to providing diagnostic ECG devices with advanced applications and features, such as the CASE exercise testing system by GE Healthcare. The integration of ECG devices with compatible technologies will have a positive impact on the global market growth of diagnostic ECG devices.

Technological advancements and increased availability of innovative treatment procedures will drive the electrocardiograph (ECG) industry. The implementation of the Exercise Testing system and cardio data management enables efficient management of rising cases of arrhythmia, coronary artery disease, and cardiomyopathy through Resting ECG, Ambulatory ECG, pacemaker, Holter monitor, and Event monitor. According to a study conducted by NCBI, more than 2.6 per 1000 people in the United States of America have pacemakers implanted to treat various heart conditions. The use of pacemakers is more prevalent among the elderly, with 0.4 per 1000 people in the age group of 18-64 using pacemakers, while 26 per 1000 people in the age group of 65+ rely on pacemakers. The adoption of new technological advancements and accessibility to innovative treatment procedures can significantly boost the mobile ECG devices, home ECG, and ECG equipment industry.

### Increase In the Government Funding

The projected increase in government funding is expected to create significant opportunities for the growth of the diagnostic electrocardiograph (ECG) market in the upcoming years. This financial support will not only enable advancements in ECG technology, but also foster research and development efforts to enhance its accuracy, introduce innovative features, and improve overall accessibility. With these advancements, healthcare providers will be better equipped to diagnose and monitor cardiac conditions, leading to more precise and personalized patient care. This will not only benefit individuals by ensuring early detection and effective management of heart-related issues, but also contribute to the expansion and evolution of the ECG market as a whole.

### Segmental Insights

### Product Type Insights

Based on product type, the resting electrocardiograph has emerged as the largest market due to its high demand, which is expected to persist in the future. This significant factor contributes to its rapid growth during the forecast period. Electrocardiograph devices are primarily designed to record cardiac activities, aiding in the monitoring of heart conditions. The market has experienced substantial growth driven by intensive research and development efforts by key players to enhance electrocardiograph systems for accurate diagnosis of disorders. Another product in this segment, the holter monitor, is anticipated to exhibit faster growth during the forecast period.

The escalating demand for this product in the market, particularly for detecting cardiac arrhythmias and ensuring precise diagnosis, presents a significant opportunity. Stress electrocardiographs also demonstrate notable growth, attributed to the expanding geriatric population. The elderly age group has witnessed a remarkable increase in recent years, driven by improved life expectancy. Consequently, there is an elevated demand for accurate and precise electrocardiograph devices. Key market players are keen to seize opportunities in this developing market to achieve substantial revenue during the forecast period.

### End User Insights

Based on the end user analysis, hospitals and clinics have demonstrated significant revenue returns and therefore have dominated this segment. This trend is expected to persist due to the extensive availability of cardiac facilities in these healthcare centres. Electrocardiograph machines are commonly found in hospitals and clinics, enabling them to provide prompt services and facilities to consumers. These establishments serve as primary healthcare centres where patients seek assistance during cardiac discomfort. The rapid availability of services and diverse facilities in these centres serves as a key driver for the market.

Ambulatory surgical centres also play a role in this segment by providing electrocardiograph machines for monitoring patients' cardiac activities. This segment is anticipated to witness substantial growth in the future. The market is expected to generate higher revenue returns during the forecast period, primarily due to the growing demand for electrocardiograph reports prior to surgeries. In rural areas where major facilities are lacking, other primary healthcare centres that offer electrocardiograph devices serve as driving forces for the market. With the increasing prevalence of cardiac disorders and irregularities, the availability of electrocardiograph devices has become a primary necessity.

## Regional Insights

Based on geographical factors, the North America region has emerged as the dominant segment globally, primarily due to the significant number of cardiac patients residing in this area. The adoption of modern lifestyles has adversely affected the dietary habits of individuals, leading to a substantial increase in the prevalence of various cardiovascular disorders. Similarly, the Asia Pacific region has witnessed notable growth, largely driven by the high volume of cardiac patients seeking healthcare services. The global phenomenon of rapid urbanization has served as a major catalyst for the electrocardiograph market, with the increasing demand for advanced technologies in this field. European nations have also demonstrated significant demand for electrocardiograph devices, primarily attributable to the advanced healthcare facilities provided by the government. Furthermore, the expanding geriatric population presents a substantial growth opportunity for the market throughout the forecast period.

## Key Market Players

General Electric Company

Koninklijke Philips N.V.

Nihon Kohden Corporation

Ambu A/S

Spacelabs Healthcare

AliveCor, Inc.

Mindray Bio-Medical Electronics Co., Ltd.

Hill-Rom Holdings, Inc.

BPL Medical Technologies

Cardonet, Inc.

Report Scope:



In this report, the Global Diagnostic Electrocardiograph Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Diagnostic Electrocardiograph Market, By Product Type:

Resting ECG Devices

Stress ECG Devices

Holter Monitors

Others

Diagnostic Electrocardiograph Market, By Channel:

12-channel

6-channel

5- channel

3- channel

Single- channel

Diagnostic Electrocardiograph Market, By End User:

Hospitals & Clinics

Ambulatory Surgical Centres

Cardiac Care Centres

Others

Diagnostic Electrocardiograph Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Diagnostic Electrocardiograph Market.

### Available Customizations:

Global Diagnostic Electrocardiograph market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

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