

mHealth Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Connected Devices (BP & Glucose Monitors, Heart Rate Monitors, Pulse Oximeters, Foetal Monitoring Devices, Sleep Apnea Monitors, Others), By mHealth App (Medical Apps, (Women's Health Apps, Medication Management Apps, Personal Health Apps, Chronic Care Management Apps, Remote Monitoring Apps, Others) , Fitness Apps (Exercise & Fitness, Diet & Nutrition, Lifestyle & Stress), By mHealth Service (Remote Monitoring Services, Diagnostics and Consulting Services, Treatment Services, Fitness & Wellbeing Services, Preventive Care Services), By Region, By Competition, 2019-2029F

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Abstracts

Global mHealth Market was valued at USD 64.78 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 10.64% through 2029. The global mHealth (mobile health) market has burgeoned into a multifaceted landscape, revolutionizing healthcare delivery through the integration of mobile devices, wireless technologies, and healthcare services. With the proliferation of smartphones, wearables, and other mobile gadgets, mHealth has witnessed unprecedented growth, catering to the diverse needs of patients, healthcare providers, and stakeholders alike. This market encompasses a broad spectrum of applications, including remote patient

monitoring, medical information dissemination, diagnosis, treatment, and adherence to medication.

Key drivers propelling the expansion of the global mHealth market include the increasing prevalence of chronic diseases, rising healthcare costs, growing demand for personalized healthcare solutions, and advancements in mobile and wireless technologies. Moreover, the COVID-19 pandemic acted as a catalyst, accelerating the adoption of mHealth solutions to enable remote consultations, contact tracing, and healthcare management, thereby further amplifying market growth. Various stakeholders, including healthcare providers, pharmaceutical companies, technology firms, and regulatory bodies, are actively engaged in shaping the trajectory of the mHealth market. The market is characterized by a diverse array of players ranging from startups to established corporations, fostering innovation and competition.

Challenges such as data privacy concerns, regulatory complexities, interoperability issues, and disparities in access to technology and healthcare services persist, necessitating concerted efforts from stakeholders to address these barriers. Looking ahead, the global mHealth market is poised for sustained growth, propelled by ongoing digital transformation in healthcare, advancements in artificial intelligence, the Internet of Things (IoT), and 5G technologies, as well as evolving patient preferences and healthcare delivery models. The convergence of these factors is expected to drive innovation, enhance patient outcomes, improve healthcare accessibility and affordability, and ultimately, revolutionize the way healthcare is delivered and experienced worldwide.

Key Market Drivers

Proliferation of Smartphones and Wearable Devices

The proliferation of smartphones and wearable devices has emerged as a significant catalyst for the growth of the global mHealth market. Smartphones, ubiquitous in today's society, have become indispensable tools for accessing information, communicating, and managing various aspects of daily life. Their portability, connectivity, and versatility make them ideal platforms for delivering mHealth solutions to users worldwide. With the increasing availability and affordability of smartphones, a large segment of the global population now has access to these devices. This widespread adoption has democratized healthcare access, allowing individuals to monitor their health, access medical information, and engage with healthcare services regardless of their geographical location or socioeconomic status. Mobile health applications, or mHealth

apps, offer a wide range of functionalities, including symptom tracking, medication reminders, fitness tracking, and virtual consultations with healthcare providers. These apps empower users to take control of their health and well-being, promoting preventive care and early intervention.

Wearable devices, such as smartwatches, fitness trackers, and health monitoring gadgets, complement smartphones by providing continuous monitoring of vital signs and health metrics. Equipped with sensors for tracking heart rate, sleep patterns, physical activity, and more, wearables offer real-time feedback and insights into users' health status. Integration with mHealth apps allows for seamless data synchronization and analysis, enabling personalized health recommendations and interventions.

The combination of smartphones and wearables creates a powerful ecosystem for mHealth innovation and adoption. Healthcare providers can leverage these devices to remotely monitor patients, deliver personalized interventions, and optimize treatment plans. Patients, in turn, benefit from increased convenience, accessibility, and engagement in their healthcare journey.

The evolution of smartphone technology, including advancements in processing power, battery life, and connectivity, continues to drive innovation in the mHealth space. Emerging technologies such as artificial intelligence, augmented reality, and Internet of Things (IoT) further enhance the capabilities of mHealth solutions, opening up new possibilities for improving healthcare delivery and patient outcomes.

Rising Prevalence of Chronic Diseases

The rising prevalence of chronic diseases worldwide has become a significant driver for the growth of the global mHealth market. Chronic diseases, such as diabetes, cardiovascular conditions, respiratory disorders, and cancer, have reached epidemic proportions, imposing a substantial burden on healthcare systems and economies globally. These diseases often require long-term management, monitoring, and lifestyle interventions, which can be facilitated through mHealth solutions.

Mobile health applications (mHealth apps) offer a range of tools and functionalities that empower individuals to better manage their chronic conditions. These apps provide features such as symptom tracking, medication reminders, diet and exercise monitoring, and educational resources, allowing patients to take a proactive approach to their health. By enabling self-management and adherence to treatment plans, mHealth apps can help improve health outcomes and quality of life for individuals living with chronic

diseases.

Remote monitoring technologies integrated with mHealth platforms enable healthcare providers to monitor patients' health status and treatment adherence outside of traditional clinical settings. Wearable devices equipped with sensors for measuring vital signs, activity levels, and other health metrics allow for continuous monitoring and real-time data transmission to healthcare providers. This remote monitoring capability is particularly beneficial for patients with chronic conditions who require regular monitoring and intervention to prevent complications and hospitalizations.

The increasing prevalence of chronic diseases has also spurred the development of specialized mHealth solutions tailored to specific conditions. For example, there are diabetes management apps that help users track blood glucose levels, insulin doses, and carbohydrate intake, while cardiovascular health apps provide tools for monitoring blood pressure, cholesterol levels, and heart rate variability. These condition-specific mHealth solutions offer personalized support and guidance to individuals managing chronic diseases, complementing traditional healthcare services.

COVID-19 Pandemic Accelerating Digital Health Adoption

The COVID-19 pandemic has acted as a powerful accelerator for the adoption of digital health technologies, including mobile health (mHealth) solutions, thereby significantly boosting the global mHealth market. As the pandemic unfolded, healthcare systems worldwide faced unprecedented challenges, including the need to provide care while minimizing the risk of virus transmission. In response, healthcare providers and patients turned to digital health tools to ensure continuity of care and access to essential healthcare services.

Telemedicine platforms and virtual care options emerged as critical components of the pandemic response, enabling healthcare providers to deliver remote consultations, diagnosis, and treatment to patients while adhering to social distancing guidelines. mHealth apps and wearable devices played a pivotal role in facilitating remote monitoring of patients' health metrics, allowing healthcare providers to track symptoms, assess disease progression, and intervene as needed. This shift towards virtual care and remote monitoring not only helped mitigate the spread of the virus but also highlighted the potential of digital health technologies to transform healthcare delivery.

The COVID-19 pandemic also spurred innovation in mHealth solutions, leading to the development of new tools and functionalities to address emerging healthcare needs.

For example, contact tracing apps were deployed to track and contain the spread of the virus, leveraging smartphone technology and location data to identify potential exposures and notify individuals at risk. Similarly, symptom tracking apps were used to monitor the prevalence and distribution of COVID-19 symptoms in the population, providing valuable data for public health authorities and researchers.

The pandemic accelerated regulatory changes and policy initiatives aimed at promoting the adoption of digital health technologies. Governments and regulatory bodies implemented measures to facilitate telemedicine reimbursement, streamline regulatory processes for mHealth apps, and promote interoperability and data exchange among healthcare systems. These policy changes created a more favorable environment for investment and innovation in the mHealth market, driving growth and expansion.

Key Market Challenges

Data Privacy and Security Concerns

One of the foremost challenges facing the mHealth market is the issue of data privacy and security. As mHealth apps and devices collect and transmit sensitive health information, there are growing concerns about the unauthorized access, misuse, and breach of personal health data. Data breaches and security vulnerabilities can erode patient trust and confidence in mHealth solutions, leading to reluctance in adoption. Moreover, regulatory compliance with data protection laws such as HIPAA (Health Insurance Portability and Accountability Act) and GDPR (General Data Protection Regulation) adds complexity and costs for mHealth developers and providers. Addressing data privacy and security concerns requires robust encryption mechanisms, secure data storage protocols, and adherence to regulatory guidelines to ensure the confidentiality, integrity, and availability of health information.

Regulatory and Compliance Challenges

The mHealth market operates within a complex regulatory landscape characterized by varying regulations and standards across different regions and jurisdictions. Regulatory compliance requirements for mHealth apps and devices involve aspects such as data privacy, medical device classification, interoperability, and quality assurance. Navigating these regulatory requirements can be challenging for mHealth developers, especially startups and smaller players with limited resources. Delays in regulatory approvals, compliance costs, and uncertainty regarding regulatory interpretations pose significant barriers to market entry and innovation in the mHealth sector. Streamlining regulatory

processes, establishing harmonized standards, and providing clear guidance for mHealth stakeholders can help alleviate regulatory burdens and foster innovation in the market.

Limited Digital Literacy and Accessibility

Despite the increasing penetration of smartphones and digital technologies, disparities in digital literacy and accessibility persist, particularly among underserved populations and elderly individuals. Limited access to smartphones, internet connectivity, and digital literacy skills can hinder the adoption and use of mHealth solutions, exacerbating healthcare disparities and widening the digital divide. Furthermore, older adults and individuals with disabilities may face usability challenges with mHealth apps and devices due to small screens, complex interfaces, and physical limitations. Addressing digital literacy and accessibility barriers requires targeted education and outreach initiatives, user-centered design approaches, and inclusive technology solutions tailored to the needs and preferences of diverse populations. Collaborating with community organizations, healthcare providers, and government agencies can help promote digital inclusion and equitable access to mHealth services.

Key Market Trends

Focus on Personalized Healthcare Solutions

The focus on personalized healthcare solutions has emerged as a significant driver for the growth of the global mHealth market. As healthcare evolves from a one-size-fits-all approach to personalized and precision medicine, there is a growing recognition of the importance of tailoring healthcare interventions to individual patient needs. mHealth technologies play a crucial role in this paradigm shift by enabling the delivery of personalized healthcare solutions that are tailored to the unique characteristics, preferences, and health goals of each individual.

Mobile health applications (mHealth apps) leverage data analytics, machine learning, and artificial intelligence to analyze vast amounts of health data collected from users and provide personalized recommendations and interventions. These apps can track various health metrics, such as physical activity, sleep patterns, diet, and medication adherence, and use this information to generate insights and actionable recommendations for users. By harnessing the power of data and technology, mHealth apps empower individuals to take control of their health and make informed decisions about their care.

Wearable devices equipped with sensors for monitoring vital signs, activity levels, and other health metrics offer continuous, real-time data capture, enabling personalized health monitoring and intervention. Integration with mHealth apps allows for seamless data synchronization and analysis, facilitating personalized feedback and guidance based on individual health goals and preferences. Whether it's managing chronic conditions, achieving fitness goals, or optimizing overall wellness, personalized mHealth solutions provide users with tailored support and resources to help them achieve their health objectives.

The focus on personalized healthcare solutions is driving innovation in the mHealth market, leading to the development of new tools, features, and functionalities to meet the diverse needs of users. For example, there are mHealth apps that provide personalized fitness plans based on users' fitness levels, goals, and preferences, as well as apps that offer personalized nutrition recommendations tailored to users' dietary preferences, health conditions, and nutritional requirements. These personalized interventions enhance user engagement, adherence, and outcomes, thereby driving the adoption of mHealth solutions.

Artificial Intelligence and Data Analytics

Artificial intelligence (AI) and data analytics are revolutionizing the global mHealth (mobile health) market, driving innovation, improving healthcare outcomes, and enhancing the overall patient experience. As the volume of health data continues to grow exponentially, AI and data analytics capabilities are increasingly being integrated into mHealth solutions to unlock valuable insights, improve decision-making, and personalize patient care.

AI-powered mHealth applications leverage machine learning algorithms to analyze vast amounts of health data collected from various sources, including wearable devices, electronic health records (EHRs), and patient-generated data. These algorithms can identify patterns, trends, and correlations within the data, enabling predictive analytics, diagnostic support, and personalized health recommendations. For example, AI algorithms can predict the likelihood of disease onset or progression based on individual risk factors and health behaviors, allowing for early intervention and preventive care.

Data analytics play a crucial role in extracting actionable insights from health data, enabling healthcare providers to make more informed decisions and optimize care delivery. By analyzing patient data in real-time, data analytics tools can identify gaps in

care, monitor treatment effectiveness, and assess population health trends. Additionally, data analytics can help healthcare organizations streamline operations, improve resource allocation, and enhance patient engagement through targeted interventions and personalized interventions.

The integration of AI and data analytics into mHealth solutions is driving significant advancements across various healthcare domains, including remote patient monitoring, chronic disease management, telemedicine, and population health management. AI-powered diagnostic tools can accurately interpret medical images, such as X-rays and MRI scans, aiding in the early detection and diagnosis of diseases. Similarly, AI-driven predictive analytics can identify patients at risk of adverse health events, enabling proactive interventions to prevent hospital readmissions and complications.

Segmental Insights

Connected Devices Insights

Based on the Connected Devices, the heart rate monitors segment emerged as the dominant segment in the Global mHealth market in 2023. Heart rate monitors address a critical aspect of health management – cardiovascular health. Given the increasing prevalence of heart-related conditions worldwide, there has been a growing emphasis on monitoring heart health in real-time. Heart rate monitors offer individuals the ability to track their heart rate continuously, providing valuable insights into their cardiovascular fitness and potential anomalies. Advancements in sensor technology and device miniaturization have led to the development of highly accurate and wearable heart rate monitors. These devices seamlessly integrate into users' daily lives, offering non-intrusive monitoring without disrupting regular activities. The convenience and comfort provided by wearable heart rate monitors have significantly contributed to their widespread adoption.

mHealth App Insights

Based on the mHealth App, the medical apps segment emerged as the dominant segment in the global mHealth market in 2023. Medical apps cater to a broader spectrum of healthcare needs, ranging from disease management and medication adherence to symptom tracking and remote consultations. The versatility and functionality offered by medical apps make them indispensable tools for both healthcare professionals and patients alike. With the increasing prevalence of chronic diseases and the growing demand for remote healthcare solutions, medical apps have emerged as

essential components of modern healthcare delivery systems. Advancements in technology have empowered medical apps with increasingly sophisticated features, such as integration with electronic health records (EHRs), telemedicine capabilities, and artificial intelligence-driven diagnostics. These features enhance the efficiency, accuracy, and accessibility of healthcare services, driving the adoption of medical apps among both users and healthcare providers.

Regional Insights

North America emerged as the dominant region in the Global MHealth Market in 2023, holding the largest market share. North America boasts a highly developed healthcare infrastructure coupled with advanced technological capabilities, making it fertile ground for the adoption of mHealth solutions. With a robust network of healthcare providers, research institutions, and technology companies, the region is at the forefront of pioneering new approaches to healthcare delivery, including the integration of mobile technologies for remote patient monitoring, telemedicine, and health information exchange. Strategic partnerships between healthcare providers, technology firms, and telecommunication companies have accelerated the adoption of mHealth solutions in North America. Collaborative efforts to integrate electronic health records, interoperable health IT systems, and telehealth platforms have streamlined healthcare delivery, improved care coordination, and enhanced patient engagement across the region.

Key Market Players

Medtronic Plc.

Apple, Inc

Samsung Electronics

Google LLC.

Koninklijke Philips N.V.

AgaMatrix, Inc

Bayer AG

Omron Corporation

AliveCor, Inc.

Orange Healthcare, Inc.,

Report Scope:

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

MHealth Market,By Connected Devices:

oBP Glucose Monitors

oHeart Rate Monitors

oPulse Oximeters

oFoetal Monitoring Devices

oSleep Apnea Monitors

oOthers

MHealth Market,By mHealth App:

oMedical Apps

oFitness Apps

MHealth Market,By mHealth Service:

oRemote Monitoring Services

oDiagnostics and Consulting Services

oTreatment Services

oFitness Wellbeing Services

oPreventive Care Services

MHealth Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

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

Available Customizations:

Global MHealth Market report with the given market data, TechSci 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).

Contents

1.PRODUCT OVERVIEW

- 1.1.Market Definition
- 1.2.Scope of the Market
 - 1.2.1.Markets Covered
 - 1.2.2.Years Considered for Study
 - 1.2.3.Key Market Segmentations

2.RESEARCH METHODOLOGY

- 2.1.Objective of the Study
- 2.2.Baseline Methodology
- 2.3.Key Industry Partners
- 2.4.Major Association and Secondary Sources
- 2.5.Forecasting Methodology
- 2.6.Data Triangulation Validation
- 2.7.Assumptions and Limitations

3.EXECUTIVE SUMMARY

- 3.1.Overview of the Market
- 3.2.Overview of Key Market Segmentations
- 3.3.Overview of Key Market Players
- 3.4.Overview of Key Regions/Countries
- 3.5.Overview of Market Drivers, Challenges, and Trends

4.VOICE OF CUSTOMER

5.GLOBAL MHEALTH MARKET OUTLOOK

- 5.1.Market Size Forecast
 - 5.1.1.By Value
- 5.2.Market Share Forecast
 - 5.2.1.By Connected Devices (BP Glucose Monitors, Heart Rate Monitors, Pulse Oximeters, Foetal Monitoring Devices, Sleep Apnea Monitors, Others)
 - 5.2.2.By mHealth App ((Medical Apps (Women's Health Apps, Medication Management Apps, Personal Health Apps, Chronic Care Management Apps, Remote

Monitoring Apps, Others), Fitness Apps(Exercise Fitness, Diet Nutrition, Lifestyle Stress))

5.2.3.By mHealth Service (Remote Monitoring Services, Diagnostics and Consulting Services, Treatment Services, Fitness Wellbeing Services, Preventive Care Services)

5.2.4.By Company (2023)

5.2.5.By Region

5.3.Market Map

6.NORTH AMERICA MHEALTH MARKET OUTLOOK

6.1.Market Size Forecast

6.1.1.By Value

6.2.Market Share Forecast

6.2.1.By Connected Devices

6.2.2.By mHealth App

6.2.3.By mHealth Service

6.2.4.By Country

6.3.North America: Country Analysis

6.3.1.United States mHealth Market Outlook

6.3.1.1.Market Size Forecast

6.3.1.1.1.By Value

6.3.1.2.Market Share Forecast

6.3.1.2.1.By Connected Devices

6.3.1.2.2.By mHealth App

6.3.1.2.3.By mHealth Service

6.3.2.Mexico mHealth Market Outlook

6.3.2.1.Market Size Forecast

6.3.2.1.1.By Value

6.3.2.2.Market Share Forecast

6.3.2.2.1.By Connected Devices

6.3.2.2.2.By mHealth App

6.3.2.2.3.By mHealth Service

6.3.3.Canada mHealth Market Outlook

6.3.3.1.Market Size Forecast

6.3.3.1.1.By Value

6.3.3.2.Market Share Forecast

6.3.3.2.1.By Connected Devices

6.3.3.2.2.By mHealth App

6.3.3.2.3.By mHealth Service

7.EUROPE MHEALTH MARKET OUTLOOK

7.1.Market Size Forecast

7.1.1.By Value

7.2.Market Share Forecast

7.2.1.By Connected Devices

7.2.2.By mHealth App

7.2.3.By mHealth Service

7.2.4.By Country

7.3.Europe: Country Analysis

7.3.1.France mHealth Market Outlook

7.3.1.1.Market Size Forecast

7.3.1.1.1.By Value

7.3.1.2.Market Share Forecast

7.3.1.2.1.By Connected Devices

7.3.1.2.2.By mHealth App

7.3.1.2.3.By mHealth Service

7.3.2.Germany mHealth Market Outlook

7.3.2.1.Market Size Forecast

7.3.2.1.1.By Value

7.3.2.2.Market Share Forecast

7.3.2.2.1.By Connected Devices

7.3.2.2.2.By mHealth App

7.3.2.2.3.By mHealth Service

7.3.3.United Kingdom mHealth Market Outlook

7.3.3.1.Market Size Forecast

7.3.3.1.1.By Value

7.3.3.2.Market Share Forecast

7.3.3.2.1.By Connected Devices

7.3.3.2.2.By mHealth App

7.3.3.2.3.By mHealth Service

7.3.4.Italy mHealth Market Outlook

7.3.4.1.Market Size Forecast

7.3.4.1.1.By Value

7.3.4.2.Market Share Forecast

7.3.4.2.1.By Connected Devices

7.3.4.2.2.By mHealth App

7.3.4.2.3.By mHealth Service

7.3.5.Spain mHealth Market Outlook

7.3.5.1.Market Size Forecast

7.3.5.1.1.By Value

7.3.5.2.Market Share Forecast

7.3.5.2.1.By Connected Devices

7.3.5.2.2.By mHealth App

7.3.5.2.3.By mHealth Service

8.ASIA-PACIFIC MHEALTH MARKET OUTLOOK

8.1.Market Size Forecast

8.1.1.By Value

8.2.Market Share Forecast

8.2.1.By Connected Devices

8.2.2.By mHealth App

8.2.3.By mHealth Service

8.2.4.By Country

8.3.Asia-Pacific: Country Analysis

8.3.1.China mHealth Market Outlook

8.3.1.1.Market Size Forecast

8.3.1.1.1.By Value

8.3.1.2.Market Share Forecast

8.3.1.2.1.By Connected Devices

8.3.1.2.2.By mHealth App

8.3.1.2.3.By mHealth Service

8.3.2.India mHealth Market Outlook

8.3.2.1.Market Size Forecast

8.3.2.1.1.By Value

8.3.2.2.Market Share Forecast

8.3.2.2.1.By Connected Devices

8.3.2.2.2.By mHealth App

8.3.2.2.3.By mHealth Service

8.3.3.South Korea mHealth Market Outlook

8.3.3.1.Market Size Forecast

8.3.3.1.1.By Value

8.3.3.2.Market Share Forecast

8.3.3.2.1.By Connected Devices

8.3.3.2.2.By mHealth App

8.3.3.2.3.By mHealth Service

8.3.4.Japan mHealth Market Outlook

8.3.4.1.Market Size Forecast

8.3.4.1.1.By Value

8.3.4.2.Market Share Forecast

8.3.4.2.1.By Connected Devices

8.3.4.2.2.By mHealth App

8.3.4.2.3.By mHealth Service

8.3.5.Australia mHealth Market Outlook

8.3.5.1.Market Size Forecast

8.3.5.1.1.By Value

8.3.5.2.Market Share Forecast

8.3.5.2.1.By Connected Devices

8.3.5.2.2.By mHealth App

8.3.5.2.3.By mHealth Service

9.SOUTH AMERICA MHEALTH MARKET OUTLOOK

9.1.Market Size Forecast

9.1.1.By Value

9.2.Market Share Forecast

9.2.1.By Connected Devices

9.2.2.By mHealth App

9.2.3.By mHealth Service

9.2.4.By Country

9.3.South America: Country Analysis

9.3.1.Brazil mHealth Market Outlook

9.3.1.1.Market Size Forecast

9.3.1.1.1.By Value

9.3.1.2.Market Share Forecast

9.3.1.2.1.By Connected Devices

9.3.1.2.2.By mHealth App

9.3.1.2.3.By mHealth Service

9.3.2.Argentina mHealth Market Outlook

9.3.2.1.Market Size Forecast

9.3.2.1.1.By Value

9.3.2.2.Market Share Forecast

9.3.2.2.1.By Connected Devices

9.3.2.2.2.By mHealth App

9.3.2.2.3.By mHealth Service

9.3.3.Colombia mHealth Market Outlook

9.3.3.1.Market Size Forecast

9.3.3.1.1.By Value

9.3.3.2.Market Share Forecast

9.3.3.2.1.By Connected Devices

9.3.3.2.2.By mHealth App

9.3.3.2.3.By mHealth Service

10.MIDDLE EAST AND AFRICA MHEALTH MARKET OUTLOOK

10.1.Market Size Forecast

10.1.1.By Value

10.2.Market Share Forecast

10.2.1.By Connected Devices

10.2.2.By mHealth App

10.2.3.By mHealth Service

10.2.4.By Country

10.3.MEA: Country Analysis

10.3.1.South Africa mHealth Market Outlook

10.3.1.1.Market Size Forecast

10.3.1.1.1.By Value

10.3.1.2.Market Share Forecast

10.3.1.2.1.By Connected Devices

10.3.1.2.2.By mHealth App

10.3.1.2.3.By mHealth Service

10.3.2.Saudi Arabia mHealth Market Outlook

10.3.2.1.Market Size Forecast

10.3.2.1.1.By Value

10.3.2.2.Market Share Forecast

10.3.2.2.1.By Connected Devices

10.3.2.2.2.By mHealth App

10.3.2.2.3.By mHealth Service

10.3.3.UAE mHealth Market Outlook

10.3.3.1.Market Size Forecast

10.3.3.1.1.By Value

10.3.3.2.Market Share Forecast

10.3.3.2.1.By Connected Devices

10.3.3.2.2.By mHealth App

10.3.3.2.3.By mHealth Service

11.MARKET DYNAMICS

11.1.Drivers

11.2.Challenges

12.MARKET TRENDS DEVELOPMENTS

12.1.Merger Acquisition (If Any)

12.2.Product Launches (If Any)

12.3.Recent Developments

13.PORTERS FIVE FORCES ANALYSIS

13.1.Competition in the Industry

13.2.Potential of New Entrants

13.3.Power of Suppliers

13.4.Power of Customers

13.5.Threat of Substitute Products

14.COMPETITIVE LANDSCAPE

14.1.Medtronic Plc

14.1.1.Business Overview

14.1.2.Company Snapshot

14.1.3.Products Services

14.1.4.Financials (As Reported)

14.1.5.Recent Developments

14.1.6.Key Personnel Details

14.1.7.SWOT Analysis

14.2.Apple, Inc

14.3.Samsung Electronics

14.4.Google LLC.

14.5.Koninklijke Philips N.V.

14.6.AgaMatrix, Inc

14.7.Bayer AG

14.8.Omron Corporation

14.9.AliveCor, Inc.

14.10.Orange Healthcare, Inc

15.STRATEGIC RECOMMENDATIONS

16.ABOUT US DISCLAIMER

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