

Europe Connected Health Market Size and Forecast (2021 - 2031)

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Abstracts

The Europe Connected Health Market is projected to grow significantly, reaching an estimated US\$ 123,323.1 million by 2031, up from US\$ 23,394.3 million in 2024. This growth represents a remarkable compound annual growth rate (CAGR) of 27.0% from 2025 to 2031.

Executive Summary and Market Analysis

The rapid expansion of the connected health market in Europe can be attributed to the region's robust healthcare infrastructure and the increasing demand for personalized and efficient healthcare solutions. The rising prevalence of chronic diseases, coupled with an aging population, is driving healthcare systems to adopt digital tools that facilitate long-term disease management and alleviate the pressure on hospitals. Connected health technologies, which allow for real-time data collection and patient monitoring, are transforming healthcare delivery by enabling proactive care and improving health outcomes. This transition from reactive to preventive care is a key factor in the digital transformation of healthcare services across Europe.

In December 2023, a significant agreement was signed between the European Commission and WHO/Europe, amounting to €12 million (approximately US\$ 13.08 million). This initiative aims to enhance health information systems, health data governance, and interoperability across the WHO European Region, which includes 53 countries. Over the next four years, the project will focus on improving the utilization of health data by providers, policymakers, and innovators, thereby promoting high-quality, interoperable digital systems.

Strategic Insights

Market Segmentation Analysis

The Europe Connected Health Market can be segmented based on product type, application, and end user:

By Product Type: The market is divided into M-Health Devices and M-Health Services, with M-Health Devices holding the largest market share in 2024.

By Application: The applications include Monitoring Application, Diagnostic and Treatment, Healthcare Management, Wellness and Prevention, and Others, where Monitoring Application is the leading segment in 2024.

By End User: The end users are categorized into Hospitals and Clinics, Home Monitoring, and Others, with Hospitals and Clinics dominating the market share in 2024.

Market Outlook

A significant driver of growth in the connected health market is the global shift towards preventive healthcare. As healthcare systems transition from reactive to proactive models, the integration of connected technologies becomes essential for early risk identification, chronic condition management, and the promotion of healthier lifestyles. Wearable devices, remote monitoring tools, mobile health applications, and AI-driven platforms empower individuals to monitor their health in real-time, fostering a culture of prevention rather than treatment.

Government initiatives and health organizations are increasingly advocating for early detection and lifestyle changes to mitigate the burden of diseases. The World Health Organization (WHO) has consistently emphasized the importance of prioritizing prevention as a cost-effective strategy to manage rising healthcare costs. Connected health solutions, such as continuous glucose monitors, smartwatches with ECG capabilities, and AI health coaching apps, are being widely adopted to monitor symptoms before they escalate into serious health issues.

The COVID-19 pandemic has further accelerated the demand for remote and preventive care. Telehealth platforms, which were once considered supplementary, have now become essential tools for ongoing care and risk monitoring without the need for

physical visits. For instance, the Mayo Clinic has implemented digital health tools to remotely monitor patients with chronic illnesses, enabling early interventions to prevent complications. Similarly, Apple's Health ecosystem offers features like irregular heart rhythm notifications and sleep tracking, which not only enhance user experience but also contribute to the early detection of potential health problems, aligning with broader public health objectives.

As the global population ages and the prevalence of chronic diseases rises, connected health technologies that facilitate early intervention and lifestyle management will be increasingly vital. The market's growth trajectory is influenced by the growing recognition that investing in prevention not only enhances health outcomes but also reduces long-term healthcare costs.

Country Insights

The Europe Connected Health Market is further segmented by country, including Germany, the United Kingdom, France, Italy, Spain, and the Rest of Europe. Germany is expected to hold the largest market share in 2024, driven by the increased adoption of telemedicine, remote monitoring, and digital health applications. Key factors contributing to this growth include an aging population, a rise in chronic diseases, and a strong push for healthcare digitization through national e-health strategies. The introduction of electronic health records and the Digital Healthcare Act (DVG) has spurred innovation in the sector. Additionally, Germany's strong medical technology industry and focus on data security and interoperability have fostered trust in connected health solutions. Recent legislative developments, such as the Digital Act (DigiG) and the Health Data Use Act (GDNG), passed in December 2023, aim to promote digital healthcare solutions and enhance health data usage for research.

Company Profiles

Key players in the Europe Connected Health Market include International Business Machines Corp, OMRON Corp, Abbott Laboratories, Boston Scientific Corp, Medtronic Plc, Koninklijke Philips NV, GE HealthCare Technologies Inc, Apple Inc, Fitbit LLC, and Samsung Electronics Co Ltd. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to deliver innovative products and increase their market share.

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