

Psychiatric Digital Biomarkers Market Size, Share and Growth Outlook 2026: By Type, By Clinical Practice, By Indication, By End-Use, Companies to 2034

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Abstracts

The global Psychiatric Digital Biomarkers Market size is forecast to increase from \$839.81 Million in 2026 to \$3230.23 Million in 2034 at a CAGR of 18.34% between 2026 and 2034.

The Psychiatric Digital Biomarkers market report provides detailed analysis and outlook of Psychiatric Digital Biomarkers segments including By Type (Wearables, Mobile-based Applications, Sensors / Ambient Monitoring Systems, Voice, Speech, and Audio Analytics Platforms), By Clinical Practice (Diagnostic Psychiatric Digital Biomarkers, Monitoring Psychiatric Digital Biomarkers, Predictive and Prognostic Psychiatric Digital Biomarkers), By Indication (Major Depressive Disorder (MDD) and Mood Disorders, Anxiety and Stress Disorders, Bipolar Disorder, Schizophrenia and Psychotic Disorders, Substance Use and Addictive Disorders, Attention-Deficit/Hyperactivity Disorder (ADHD) and Autism Spectrum Disorders (ASD)), By End-Use (Healthcare / Biopharmaceutical Companies, Healthcare Providers, Payers / Insurance Providers, Patients and Caregivers) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Psychiatric Digital Biomarkers Industry Overview

Objective Measurement, Remote Monitoring, and Precision Psychiatry Are Transforming Mental Health Assessment

The Psychiatric Digital Biomarkers industry is undergoing a fundamental transformation as mental health research and clinical practice increasingly shift from subjective

symptom evaluation toward objective, continuously measured behavioral and physiological indicators. Advances in digital health technologies, wearable sensors, smartphone analytics, artificial intelligence, and computational psychiatry are enabling the development of biomarkers capable of quantifying psychiatric symptoms and functional outcomes in real-world settings. Healthcare providers, pharmaceutical companies, and academic researchers are increasingly adopting digital biomarkers to improve disease characterization, support personalized treatment approaches, and enhance clinical trial efficiency. This transition reflects the broader movement toward precision psychiatry, where objective and longitudinal patient data are becoming essential components of diagnosis, monitoring, and therapeutic decision-making.

Standardization Efforts Are Establishing the Foundation for Clinical Adoption

One of the most significant challenges facing the psychiatric digital biomarkers market has been the lack of standardized measurement frameworks and validated endpoints. Industry organizations, researchers, and regulatory stakeholders are increasingly collaborating to establish consensus-based methodologies that support reproducibility and clinical utility. Reflecting this trend, the Digital Health Measurement Collaborative Community (DATAcc), organized by the Digital Medicine Society, introduced the first Digital Measures Set for Common Mental Health Disorders. This standardized framework incorporates objective measures including sleep regularity, speech biomarkers, and cognitive performance metrics to provide longitudinal assessments of patient functioning. The establishment of common digital measurement standards represents an important step toward accelerating the development, validation, and regulatory acceptance of psychiatric digital biomarkers across research and clinical environments.

Precision Medicine and Real-World Data Collection Are Advancing Psychiatric Research

The psychiatric biomarker landscape is increasingly being shaped by precision medicine initiatives and the growing adoption of continuous remote monitoring technologies. Research institutions and pharmaceutical developers are utilizing digital endpoints to improve patient stratification, identify novel biological signatures, and evaluate treatment effectiveness under real-world conditions. Supporting this evolution, the Precision Mind Prize initiative, jointly organized by the FondaMental Foundation and the NIHR Mental Health Translational Research Collaboration, is promoting collaborative research focused on identifying biomarkers associated with immune-mediated psychosis, anhedonia, and other complex psychiatric conditions.

Simultaneously, clinical trials are increasingly integrating smartphone-based assessments, wearable sensors, and remote monitoring platforms to capture objective behavioral and physiological data outside traditional clinical settings. These technologies enable researchers to better characterize psychiatric phenotypes, monitor disease progression continuously, and support the development of more personalized and evidence-based treatment strategies.

Psychiatric Digital Biomarkers Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Psychiatric Digital Biomarkers market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Apple Inc., Alphabet Inc. (Verily/Fitbit), Microsoft Corporation, Roche, Biogen, ActiGraph, AliveCor, Inc., Empatica, Inc., Huma Therapeutics, Koneksa Health. The Psychiatric Digital Biomarkers market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Psychiatric Digital Biomarkers industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Psychiatric Digital Biomarkers Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Psychiatric Digital Biomarkers companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Psychiatric Digital Biomarkers markets

- Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Psychiatric Digital Biomarkers Market Competitive Benchmarking and Company Analysis

Leading companies in Psychiatric Digital Biomarkers industry include- Apple Inc., Alphabet Inc. (Verily/Fitbit), Microsoft Corporation, Roche, Biogen, ActiGraph, AliveCor, Inc., Empatica, Inc., Huma Therapeutics, Koneksa Health. The Psychiatric Digital Biomarkers market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Psychiatric Digital Biomarkers Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Psychiatric Digital Biomarkers market remains one of the strongest-performing segments in the country.

The US Psychiatric Digital Biomarkers Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Psychiatric Digital Biomarkers market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead

to 2034, we anticipate stronger results underpinned by opportunities exist across Psychiatric Digital Biomarkers industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Psychiatric Digital Biomarkers markets

Canada's strong Psychiatric Digital Biomarkers sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Psychiatric Digital Biomarkers market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Psychiatric Digital Biomarkers Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Psychiatric Digital Biomarkers market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Psychiatric Digital Biomarkers population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Psychiatric Digital Biomarkers industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Psychiatric Digital Biomarkers market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Psychiatric Digital Biomarkers sales through 2034

France Psychiatric Digital Biomarkers companies are emphasizing on opportunities for

rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Psychiatric Digital Biomarkers Market Size, Share, and Growth Projections to 2034-
Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Psychiatric Digital Biomarkers distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Psychiatric Digital Biomarkers Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Psychiatric Digital Biomarkers market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Psychiatric Digital Biomarkers industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Psychiatric Digital Biomarkers industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Psychiatric Digital Biomarkers Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Psychiatric Digital Biomarkers market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Psychiatric Digital Biomarkers market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Psychiatric Digital Biomarkers Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to

account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Psychiatric Digital Biomarkers Market Segmentation

By Type

Wearables

Mobile-based Applications

Sensors / Ambient Monitoring Systems

Voice, Speech, and Audio Analytics Platforms

By Clinical Practice

Diagnostic Psychiatric Digital Biomarkers

Monitoring Psychiatric Digital Biomarkers

Predictive and Prognostic Psychiatric Digital Biomarkers

By Indication

Major Depressive Disorder (MDD) and Mood Disorders

Anxiety and Stress Disorders

Bipolar Disorder

Schizophrenia and Psychotic Disorders

Substance Use and Addictive Disorders

Attention-Deficit/Hyperactivity Disorder (ADHD) and Autism Spectrum Disorders (ASD)

By End-Use

Healthcare / Biopharmaceutical Companies

Healthcare Providers

Payers / Insurance Providers

Patients and Caregivers

Leading Companies in Psychiatric Digital Biomarkers Industry (2026)

Apple Inc.

Alphabet Inc. (Verily/Fitbit)

Microsoft Corporation

Roche

Biogen

ActiGraph

AliveCor, Inc.

Empatica, Inc.

Huma Therapeutics

Koneksa Health

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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Voice, Speech, and Audio Analytics Platforms

By Clinical Practice

Diagnostic Psychiatric Digital Biomarkers

Monitoring Psychiatric Digital Biomarkers

Predictive and Prognostic Psychiatric Digital Biomarkers

By Indication

Major Depressive Disorder (MDD) and Mood Disorders

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Bipolar Disorder

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Alphabet Inc. (Verily/Fitbit)

Microsoft Corporation

Roche

Biogen

ActiGraph

AliveCor, Inc.

Empatica, Inc.

Huma Therapeutics

Koneksa Health

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