

Wearables in Pharma and Biotech Market Size, Share and Growth Outlook 2026: By Device Type, By Application, By End-User, Companies to 2034

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Abstracts

The global Wearables in Pharma and Biotech Market size is forecast to increase from \$4.31 Billion in 2026 to \$17.29 Billion in 2034 at a CAGR of 18.96% between 2026 and 2034.

The Wearables in Pharma and Biotech market report provides detailed analysis and outlook of Wearables in Pharma and Biotech segments including By Device Type (Activity Trackers and Smartwatches, Continuous Glucose Monitors (CGMs), Smart Patches and Transdermal Drug Delivery Wearables, Smart Footwear and Clothing, Biosensors and Wearable ECG Monitors), By Application (Clinical Trials and Drug Development, Patient Monitoring and Care Management, Personalized Medicine and Biomarker Discovery, Safety and Compliance Monitoring), By End-User (Pharmaceutical Companies, Biotechnology Companies, Contract Research Organizations (CROs), Academic and Research Institutes) 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.

Wearables in Pharma and Biotech Industry Overview

Connected wearable technologies are transforming clinical research and decentralized healthcare.

The global wearables in pharma and biotech industry is experiencing rapid growth as pharmaceutical companies, biotechnology firms, and healthcare providers increasingly integrate medical-grade wearable technologies into clinical research, remote patient monitoring, and decentralized clinical trials. Continuous physiological monitoring, real-

time telemetry, and objective digital biomarkers are becoming central to modern drug development, enabling researchers to capture high-frequency clinical data beyond traditional healthcare environments. The industry is also transitioning toward interoperable, vendor-neutral digital ecosystems that support seamless data integration across hospitals, clinical trial sites, and home-based patient monitoring programs.

Medical-grade wearable platforms are expanding remote monitoring and decentralized clinical trials.

Manufacturers are developing advanced biosensor technologies that continuously capture multiple physiological parameters while supporting pharmaceutical research and remote clinical care. Medtronic PLC entered a strategic partnership with Corsano Health to distribute multi-parameter wearable devices designed for remote patient monitoring (RPM) and hospital-at-home programs, enabling continuous measurement of physiological indicators including cardiac activity and oxygen saturation. At the same time, Koninklijke Philips N.V. integrated smartQare's viQtor wearable biosensor into its enterprise monitoring ecosystem, allowing continuous vital sign monitoring across hospital wards and decentralized clinical trials. The partnership also consolidates Philips' legacy Healthdot assets into the smartQare platform, supporting unified monitoring of ambulatory respiratory and pulse data through interoperable, vendor-neutral digital infrastructure.

Objective digital biomarkers and AI-enabled wearables are redefining pharmaceutical evidence generation.

The industry is increasingly replacing subjective patient-reported outcomes with continuously measured physiological endpoints that improve clinical trial quality and regulatory confidence. Sibel Health Inc. expanded deployment of its medical-grade wearable patches for decentralized clinical trials, enabling continuous monitoring of body temperature, heart rate variability, and respiratory parameters to generate richer real-world safety and efficacy datasets. The company further strengthened this trend after the U.S. Food and Drug Administration (FDA) accepted its AI-enabled Aria wearable sensor into the Drug Development Tool (DDT) Qualification Program. Positioned at the suprasternal notch, the device continuously measures objective cough frequency, establishing a standardized digital biomarker for pharmaceutical companies developing therapies for chronic respiratory diseases. These developments reflect the industry's broader transition toward AI-enabled wearable technologies that generate continuous, objective clinical evidence throughout the drug development lifecycle.

Wearables in Pharma and Biotech Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Wearables in Pharma and Biotech 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., Fitbit LLC (Google / Alphabet Inc.), Garmin Ltd., Medtronic plc, Koninklijke Philips N.V., Biofourmis Inc., Abbott Laboratories, Empatica Inc., Dexcom, Inc., AliveCor, Inc.. The Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Wearables in Pharma and Biotech Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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

Wearables in Pharma and Biotech Market Competitive Benchmarking and Company Analysis

Leading companies in Wearables in Pharma and Biotech industry include- Apple Inc., Fitbit LLC (Google / Alphabet Inc.), Garmin Ltd., Medtronic plc, Koninklijke Philips N.V., Biofourmis Inc., Abbott Laboratories, Empatica Inc., Dexcom, Inc., AliveCor, Inc.. The Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech market remains one of the strongest-performing segments in the country.

The US Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech markets

Canada's strong Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Wearables in Pharma and Biotech sales through 2034

France Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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 Wearables in Pharma and Biotech 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.

Wearables in Pharma and Biotech Market Segmentation

By Device Type

Activity Trackers and Smartwatches

Continuous Glucose Monitors (CGMs)

Smart Patches and Transdermal Drug Delivery Wearables

Smart Footwear and Clothing

Bio-sensors and Wearable ECG Monitors

By Application

Clinical Trials and Drug Development

Patient Monitoring and Care Management

Personalized Medicine and Biomarker Discovery

Safety and Compliance Monitoring

By End-User

Pharmaceutical Companies

Biotechnology Companies

Contract Research Organizations (CROs)

Academic and Research Institutes

Leading Companies in Wearables in Pharma and Biotech Industry (2026)

Apple Inc.

Fitbit LLC (Google / Alphabet Inc.)

Garmin Ltd.

Medtronic plc

Koninklijke Philips N.V.

Biofourmis Inc.

Abbott Laboratories

Empatica Inc.

Dexcom, Inc.

AliveCor, Inc.

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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Biofourmis Inc.

Abbott Laboratories

Empatica Inc.

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AliveCor, Inc.

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