

Patient Monitoring Global Market

[Devices (Cardiac, Prenatal, Fetal and Neonatal monitors, Hemodynamic, Multi-parameter, Neurological, Respiratory, Remote patient monitoring, MEMS, Temperature and Weight monitoring), End-users (Medical centre and Medical specialist, Primary healthcare and Community healthcare centers, Laboratories and diagnostic centers and Home-based users), Regional (North America, Europe, Asia Pacific and Rest of the World)]

2015

– Forecast to 2020



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1.1 REPORT DESCRIPTION

Patient monitoring market is mounting as a result of advancement in upcoming technologies that is providing an excellent opportunity for cultivating improvised care for patients across every corner of the globe. Patient monitoring system involves continuous/semi-continuous measurement of patient's physiological parameters such as heart rate, respiratory rate, blood pressure, core temperatures and pulse oximetry etc., which accelerates patient's quality care by making superior clinical-decision. Patient monitoring plays a fundamental role in emergency and operating rooms, intensive and critical care units by reducing onset of complications and risks in patient. It is proven to be very useful in respiratory therapy, recovery rooms, out-patient care, transport, radiology, cath labs, gastroenterology departments, ambulatory, home, and sleep screening applications.

Patient monitoring devices market is mainly divided into following segments such as by-devices, by-end-users. Patient Monitoring market by-devices are classified into cardiac monitors, fetal, prenatal and neonatal monitors, hemodynamic monitors, multi-parameter monitors, neurological monitors, respiratory monitors, remote patient monitors, micro electromechanical systems-based monitors, temperature and weight monitors. PM market by-end-users are divided into medical centers and medical specialist, primary healthcare and community healthcare centers, laboratories and diagnostic centers and home-based users.

Patient monitoring devices are requisite part of medical team for every procedure i.e. operating in a clinic or multi specialty hospitals. The reduction in size of the monitors over the years through contemporary technologies and rising adoption of telemetry and remote monitoring has increased the growth of the patient monitoring devices. Cardiac monitoring segment commanded the largest share in global patient monitoring market for 2013 and is expected to maintain its strong share by 2019. Multi-parameter monitoring is the second largest share holder in the market. Moreover, respiratory monitoring and neurological monitors is the fastest growing segments due to rising incidence of respiratory and neuro-degenerative diseases and demand for portable devices.

The global patient monitoring devices market is expected to reach approximately \$XX million by 2020 growing at CAGR of around 5.2%. Geographically, North America commands the largest

share and is expected to record a healthy market share by \$XX million by 2020. APAC is going to be one of the prominent regions for this market in coming years driven by healthcare awareness, high purchasing power and rising population.

Some of the key players in this market are Abbott Laboratories (U.S.), GE Health care (U.K.), Johnson & Johnson, Inc. (U.S.), Covidien (Ireland), Medtronic (U.S.), St Jude Medical (U.S.), Omron Healthcare (Japan), Philips Healthcare (Netherlands), and Roche Diagnostics Limited (Switzerland).

The report provides an in depth market analysis of the above mentioned segments across the following regions:

- North America
- Europe
- Asia-Pacific
- Rest of the World (RoW)

TABLE 1

**PATIENT MONITORING GLOBAL MARKET REVENUE, BY REGION
(2012-2020) (\$MN)**

Region	2012	2013	2014	2020	CAGR (%) (2014-2020)
North America	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX
Asia-Pacific	XX	XX	XX	XX	XX
RoW	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: International Monitoring Organization (IMO), Medical Device Manufacturers Association (MDMA), North American Approvals Registry and Monitoring Organization (NAARMO), EDMA, WHO, CDC, CMS, MITA, Other Country Associations & Groups and Industry Expert Interviews

North America accounted for the largest revenue of \$XX million of the global patient monitoring market in 2013. It is expected to grow at a CAGR of XX% from 2014 to 2020 to reach \$XX million by 2020. Asia-Pacific is expected to grow at the highest CAGR of XX% during the forecast period.

TABLE 2

**PATIENT MONITORING GLOBAL MARKET REVENUE, BY DEVICE
(2012-2020) (\$MN)**

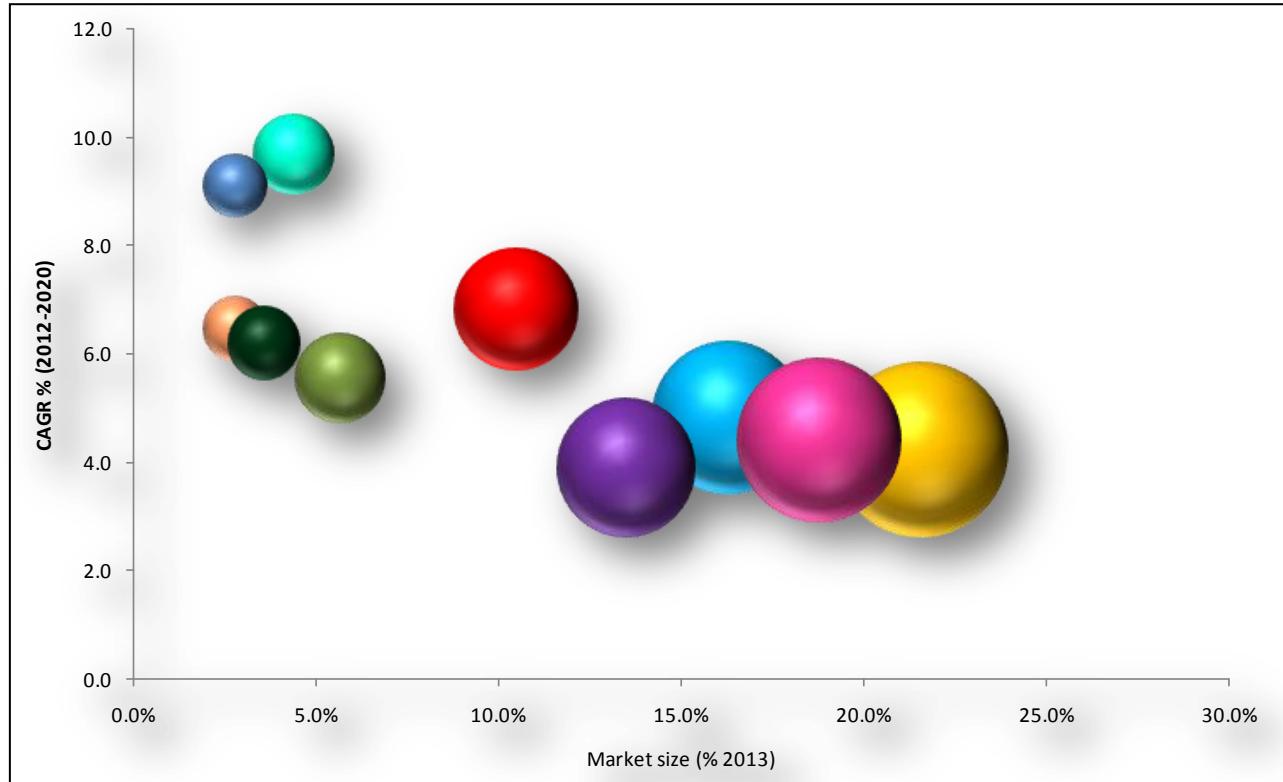
Device	2012	2013	2014	2020	CAGR (%) (2014-2020)
Cardiac monitors	XX	XX	XX	XX	XX
Prenatal, fetal & neonatal monitors	XX	XX	XX	XX	XX
Hemodynamic monitors	XX	XX	XX	XX	XX
Multi-parameter monitors	XX	XX	XX	XX	XX
Neurological monitors	XX	XX	XX	XX	XX
Respiratory monitors	XX	XX	XX	XX	XX
Remote patient monitors	XX	XX	XX	XX	XX
MEMS-based monitors	XX	XX	XX	XX	XX
Temperature monitors	XX	XX	XX	XX	XX
Weight monitors	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: International Monitoring Organization (IMO), Medical Device Manufacturers Association (MDMA), North American Approvals Registry and Monitoring Organization (NAARMO), EDMA, WHO, CDC, CMS, MITA, Other Country Associations & Groups and Industry Expert Interviews

XX commanded the largest share of XX% of the global patient monitoring market. It accounted for \$XX million in 2013 growing at a CAGR of XX% from 2014 to 2020. XX device is expected to grow at the highest CAGR of XX% during the forecast period.

FIGURE 1

**GLOBAL PATIENT MONITORING MARKET SCENARIO, BY DEVICE
OUTLOOK (2013)**



Source: International Monitoring Organization (IMO), Medical Device Manufacturers Association (MDMA), North American Approvals Registry and Monitoring Organization (NAARMO), EDMA, WHO, CDC, CMS, MITA, Other Country Associations & Groups and Industry Expert Interviews

TABLE 3

**CARDIAC MONITORING DEVICE GLOBAL MARKET REVENUE,
BY TYPE (2012-2020) (\$MN)**

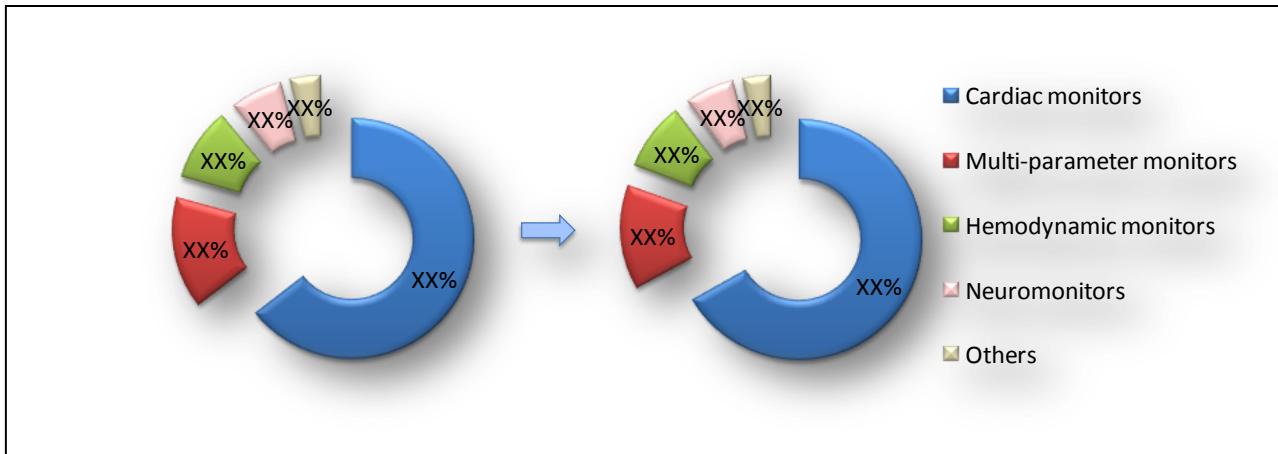
Type	2012	2013	2014	2020	CAGR (%) (2014-2020)
Electrocardiograph	XX	XX	XX	XX	XX
Event monitor	XX	XX	XX	XX	XX
Cardiac output monitor	XX	XX	XX	XX	XX
Holter monitor	XX	XX	XX	XX	XX
Implantable loop recorder	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: International Monitoring Organization (IMO), Medical Device Manufacturers Association (MDMA), North American Approvals Registry and Monitoring Organization (NAARMO), EDMA, WHO, CDC, CMS, MITA, Other Country Associations & Groups and Industry Expert Interviews

XX commanded the largest share of XX% of the global Cardiac monitoring device market. It accounted for \$XX million in 2013 growing at a CAGR of XX% from 2014 to 2020. XX is expected to grow at the highest CAGR of XX% during the forecast period.

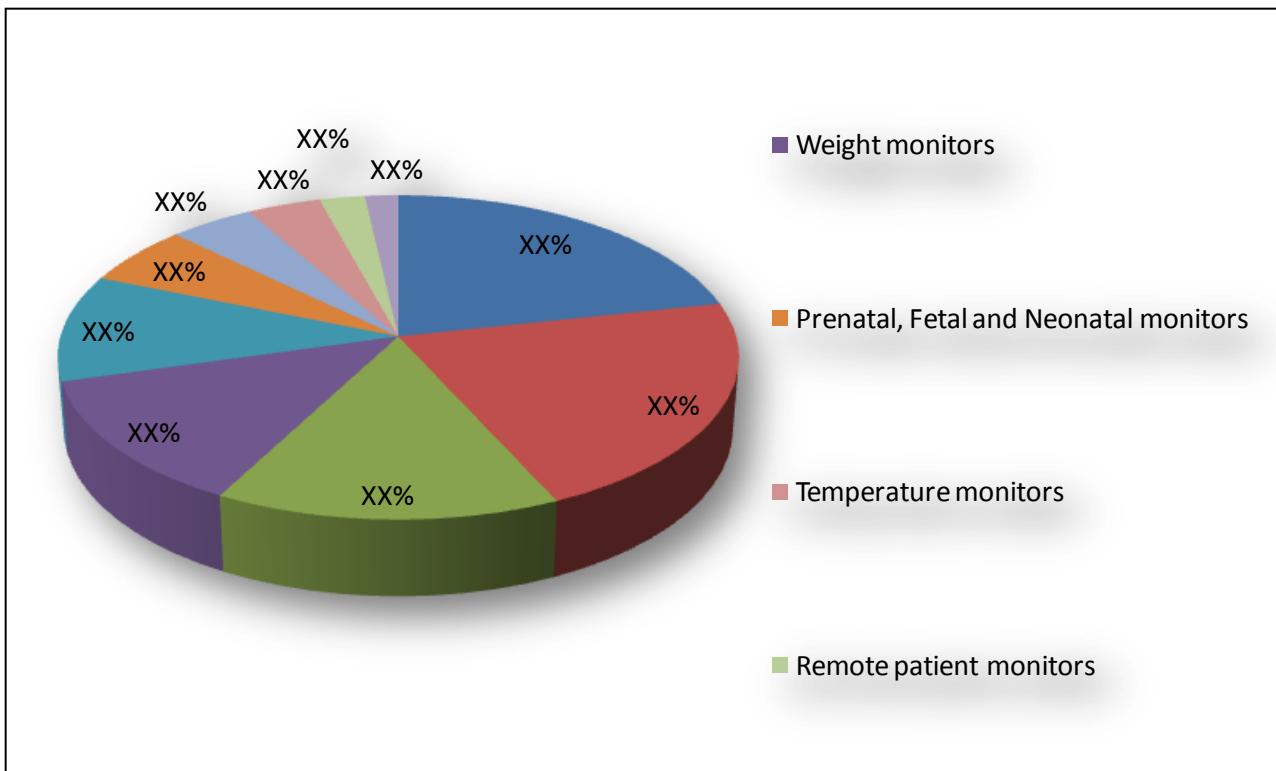
FIGURE 2

GLOBAL REMOTE PM MARKET SHARE, BY TYPE (2013 V'S 2020)



Source: International Monitoring Organization (IMO), Medical Device Manufacturers Association (MDMA), North American Approvals Registry and Monitoring Organization (NAARMO), EDMA, WHO, CDC, CMS, MITA, Other Country Associations & Groups and Industry Expert Interviews

FIGURE 3

**EUROPEAN PATIENT MONITORING MARKET SHARE,
BY DEVICE (2012 - 2020)**

Source: International Monitoring Organization (IMO), Medical Device Manufacturers Association (MDMA), North American Approvals Registry and Monitoring Organization (NAARMO), EDMA, WHO, CDC, CMS, MITA, Other Country Associations & Groups and Industry Expert Interviews

1.1.1 RESEARCH SOURCES

TABLE 4

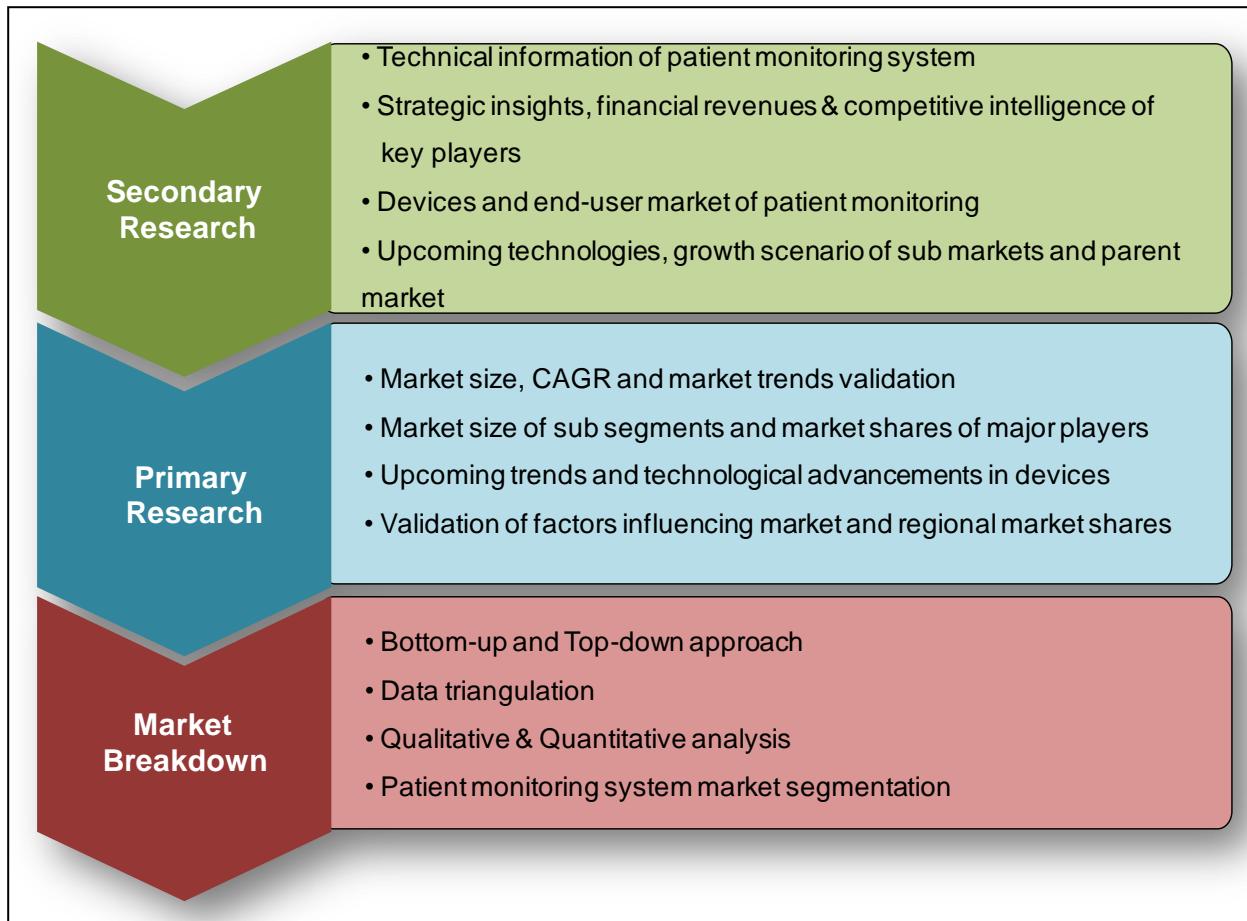
PATIENT MONITORING MARKET: RESEARCH SOURCES

Primary Sources	Secondary Sources
<ul style="list-style-type: none"> Supply Side: Top-level Executives, Marketing Managers, Sales Managers, Regional Managers Demand Side: Hospital Medical Directors, Laboratory Managers, Research Scientists, Principal Scientists, Purchase/Procurement Managers, Laboratory Technicians, Academic Research Others: Independent Consultants and Freelancers 	<ul style="list-style-type: none"> IQ4I Repository Patient Monitoring Company-Specific annual reports, SEC filings, corporate presentations & Press releases Associations and Groups: International Monitoring Organization (IMO), Medical Device Manufacturers Association (MDMA), North American Approvals Registry and Monitoring Organization (NAARMO), EDMA, WHO, CDC, CMS, MITA, Other Country Associations & Groups Paid Sources : Factiva, OneSource, Hoovers, Bloomberg Social Networking & Databases: LinkedIn, Melt-Water, and Zintro

1.2 RESEARCH METHODOLOGY

FIGURE 4

PATIENT MONITORING MARKET: RESEARCH APPROACH



1.2.1 ASSUMPTIONS

Parameter	Assumptions
Market growth	The CAGR for the forecast period (2014-2020) is assumed to be normalized and the effect of inflation, recession, economic downturn, regulatory or policy changes, or other factors are not considered.
Segmental & Sub segmental market shares	The market shares are analyzed purely based on the absolute data, in case of the data non availability for the sub markets the parent market trend has been assumed for the forecast period
Market Share Analysis	Market share analysis of key players is performed based on the primary research insights and their segmental revenues

1.2.2 MARKET SIZE ESTIMATION

The global patient monitoring system market, its segments and sub-segments were estimated and validated through secondary and primary research. The patient monitoring systems market shares, market crackdown and rating companies were determined to acquire qualitative and quantitative data. This data is consolidated and added with detailed inputs and analysis from IQ4I and presented in this report.

FIGURE 5

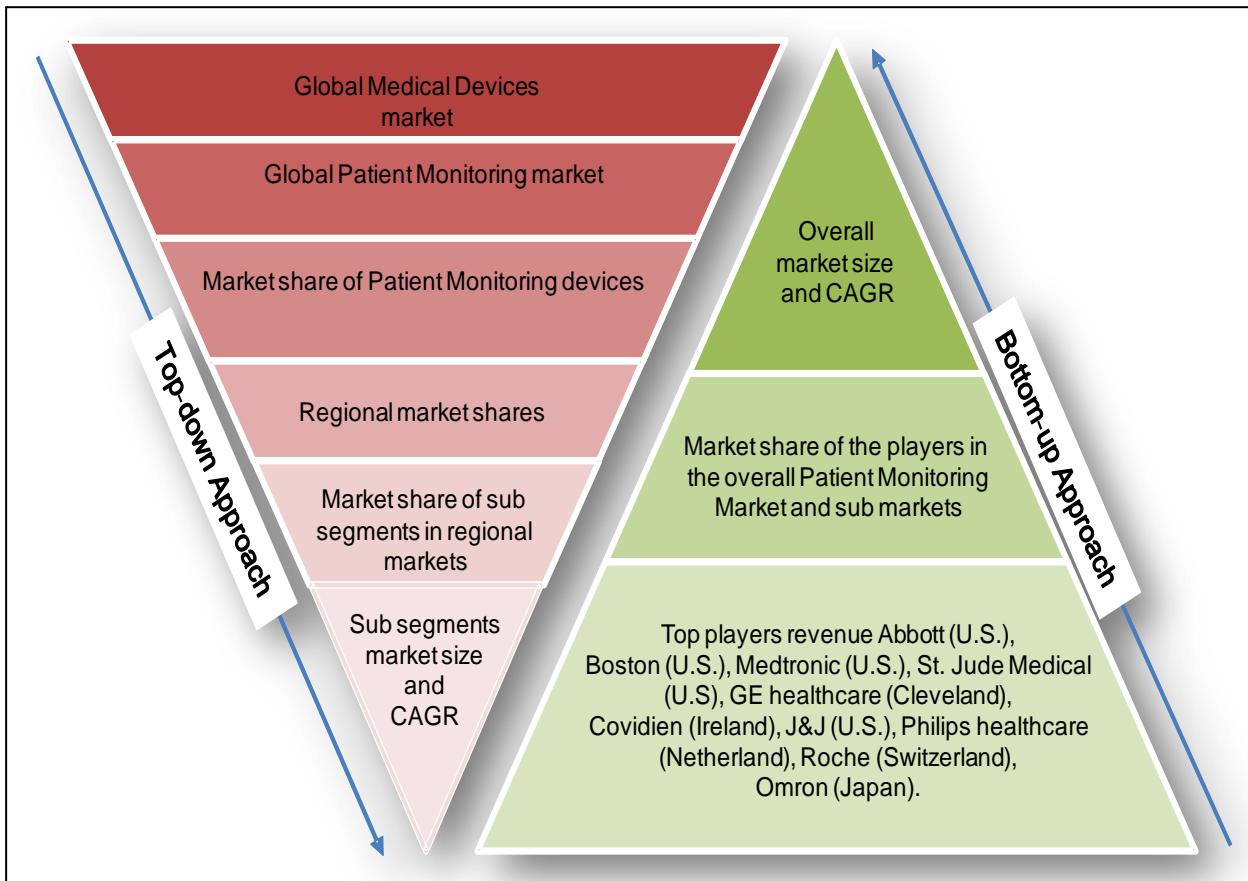
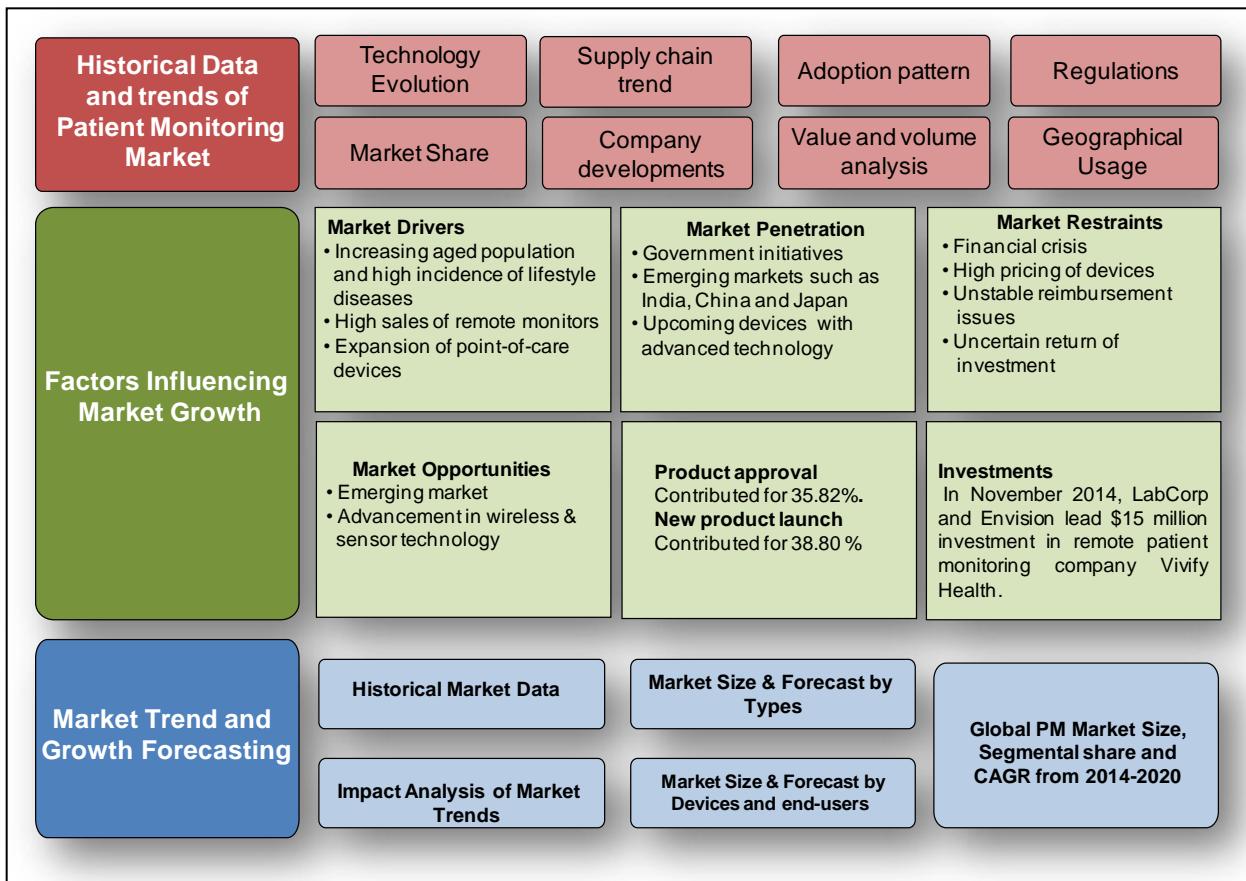
PATIENT MONITORING MARKET: TOP-DOWN AND BOTTOM-UP APPROACH

FIGURE 6

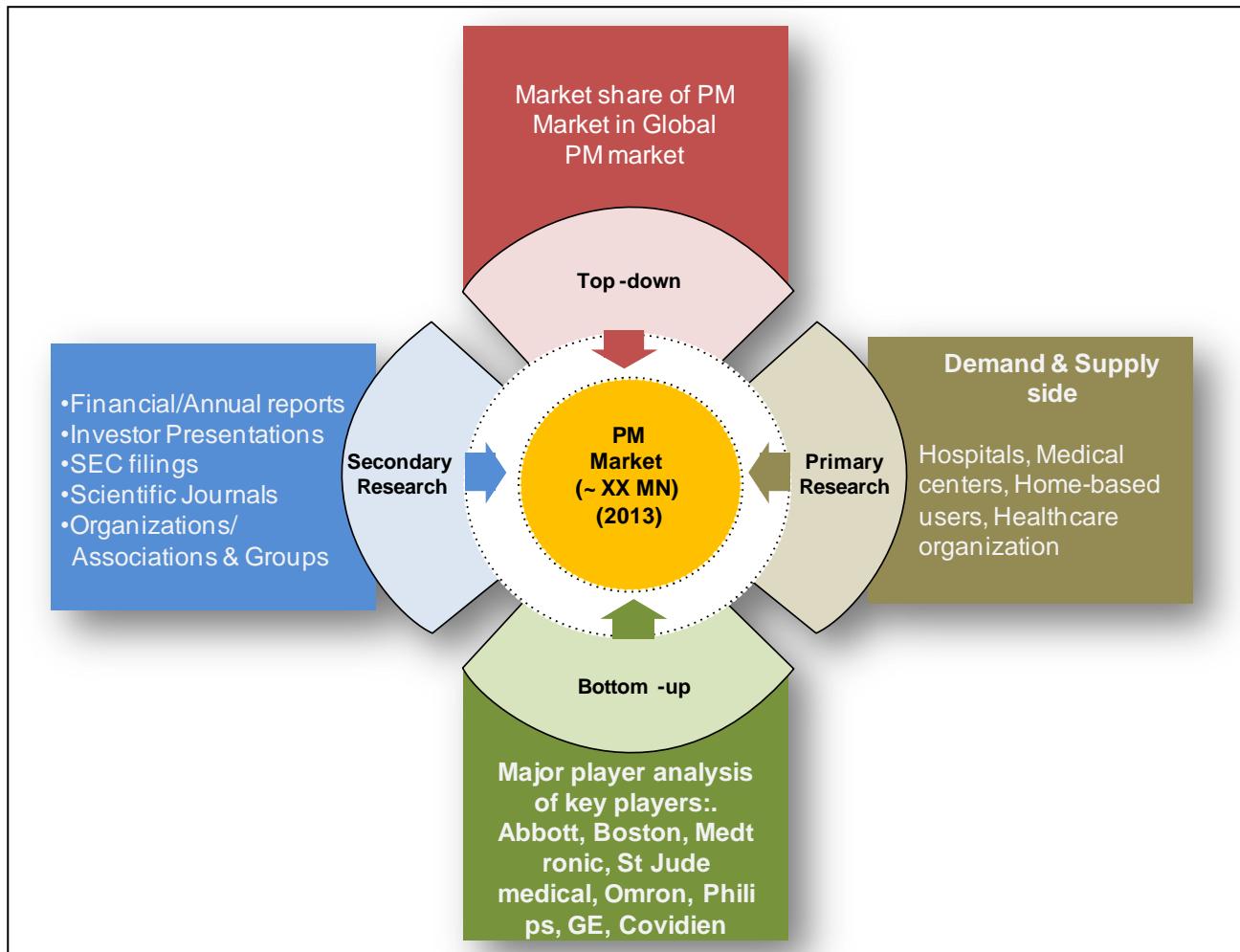
PATIENT MONITORING MARKET: FORECASTING MODEL



1.2.3 MARKET BREAKDOWN & DATA TRIANGULATION

FIGURE 7

PATIENT MONITORING MARKET: MARKET BREAKDOWN & DATA TRIANGULATION



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