

Patient Monitoring Devices Market Size and ShareMarket OverviewStudy Period | 20  
20 - 2031 |  
Market Size (2026) | USD 54.26 Billion |  
Market Size (2031) | USD 77.5 Billion |  
Growth Rate (2026 - 2031) | 7.39 % |  
Fastest Growing Market | Asia Pacific |  
Largest Market | North America |  
Market Concentration | Medium |  
Major Players\*Disclaimer: Major Players sorted in no particular order

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Patient Monitoring Devices Market Analysis by Mordor IntelligenceThe patient mon  
itoring systems market size is valued at USD 50.53 billion in 2025 and is foreca  
st to reach USD 77.50 billion by 2030, reflecting a 7.39% CAGR throughout the pe  
riod. Demand expands as aging populations, rising chronic disease prevalence, an  
d AI-driven wearable innovations converge to shift care models from episodic tre  
atment toward predictive, data-rich oversight. Hospitals still account for most  
installations, yet hospital-at-home pilots, Medicare reimbursement for remote th  
erapeutic monitoring, and expanded cloud connectivity accelerate adoption in res  
idences and long-term care settings. Technology advances in disposable biosensor  
patches, 5G-enabled edge computing, and AI-based alarm suppression further wide  
n use cases while cybersecurity mandates spur investment in secure device archit  
ectures[1]Source: Food and Drug Administration, “Select Updates for the Premarke  
t Cybersecurity Guidance,” fda.gov. Semiconductor shortages and capital budget c  
onstraints temper progress, but they also catalyze designs that rely on localize  
d data processing and modular component sourcing, enhancing resilience across su  
pply chains.

Key Report Takeaways\* By product type, multi-parameter vital-signs monitors led  
with 34.78% revenue share in 2025; neuro-monitoring devices are projected to exp  
and at a 7.65% CAGR through 2031.  
\* By portability, bedside monitors held 46.98% of the patient monitoring systems  
market share in 2025, while wearable and patch monitors record the fastest CAGR  
at 7.92% through 2031.  
\* By end user, hospitals captured 67.19% share of the patient monitoring systems  
market size in 2025; home-care settings are advancing at an 8.12% CAGR to 2031.  
\* By application, cardiology maintained 27.72% share in 2025, and neurology is e  
xpanding at an 8.34% CAGR through 2031.  
\* By geography, North America dominated with 42.23% regional share in 2025, wher  
eas Asia-Pacific posts the highest 7.56% CAGR heading to 2031.  
Note: Market size and forecast figures in this report are generated using Mordor  
Intelligence’s proprietary estimation framework, updated with the latest availa  
ble data and insights as of January 2026.

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Market Trends and InsightsDrivers Impact Analysis of Patient Monitoring Devices  
Market\*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Ti  
meline |

Aging population & home-care shift | +1.2% | North America & Europe | Long term ( $\geq 4$  years) |  
 Rising chronic disease burden | +1.1% | Asia-Pacific & emerging markets | Medium term (2-4 years) |  
 Telehealth and remote monitoring uptake | +0.9% | North America & EU, expanding to Asia-Pacific | Short term ( $\leq 2$  years) |  
 Tech advances in multi-parameter & wearables | +0.8% | Global innovation hubs | Medium term (2-4 years) |  
 AI-driven predictive analytics cuts alarm fatigue | +0.7% | Early adopters in North America & EU | Medium term (2-4 years) |  
 Hospital-at-home pilots & disposable biosensor patches | +0.6% | Primarily North America, selective EU | Short term ( $\leq 2$  years) |  
 Source: Mordor Intelligence |

**Aging Population & Home-Care Shift** Long-term demographic changes increase the proportion of adults aged 65 years and older, sustaining demand for systems that allow seniors to remain at home without compromising clinical oversight. Mayo Clinic has treated more than 2,000 patients through its Advanced Care at Home initiative, proving that 24/7 monitoring can replicate hospital-level supervision in residential settings[2] Source: Mayo Clinic, "Advanced Care at Home – Overview," [mayoclinic.org](https://www.mayoclinic.org). User-friendly interfaces and simplified device maintenance now accompany Medicare reimbursement frameworks, such as the Acute Hospital Care at Home program, which lay the economic foundation for durable growth. These shifts oblige manufacturers to refine sensor accuracy while reducing setup complexity so elderly users can manage devices independently. As a result, the patient monitoring systems market sees stronger demand for voice-guided onboarding, automatic software updates, and fail-safe connectivity that safeguard continuity of care.

**Rising Chronic Disease Burden** Cardiovascular illness, diabetes, and chronic respiratory disorders collectively account for nearly 90% of health-care expenditure, spotlighting the cost advantage of continuous surveillance over episodic treatment. Frederick Health achieved a 38% reduction in hospital readmissions after adopting remote patient monitoring, illustrating quantifiable savings and better outcomes. AI-equipped monitors spot early decompensation, as seen in Masimo's partnership with UCHealth to apply predictive analytics across virtual care networks. Integration of continuous glucose monitors with automated insulin pumps also showcases how sensing and therapy are converging into closed-loop solutions, further embedding monitoring into chronic-care pathways.

**Telehealth and Remote Monitoring Uptake** Pandemic-era acceleration transitioned telehealth from contingency to core infrastructure, with hospitals allocating 41% of upcoming tech budgets to remote monitoring capabilities. Remote patient monitoring sub-segments are projected to be propelled by 5G deployment, edge computing, and global smartwatch adoption. FDA guidance updates now include cybersecurity in connected-device submissions, ensuring that new products meet real-time data-integrity standards. Together, these trends foster a distributed model in which clinicians intervene using continuous feeds from homes, rehabilitation centers, or ambulatory clinics.

**Tech Advances in Multi-Parameter & Wearables** Wearable sensor shipments are forecast to grow from 327.6 million units in 2021 to 1.48 billion by 2030, underlining rapid mainstreaming of on-body monitoring. VitalConnect's VitalPatch, which tracks eight vital signs and identifies 21 arrhythmias, exemplifies how multi-parameter integration reduces device clutter and streamlines clinician dashboards. Flexible substrates improve comfort, while machine-learning algorithms running locally on patches enable event detection even when cloud access degrades, lowering power consumption and latency.

**Restraints Impact Analysis of Patient Monitoring Devices Market** \*Restraining Factor | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |  
 Data-privacy & cybersecurity vulnerabilities | -0.8% | Global, with highest impact in North America & EU due to regulatory scrutiny | Short term ( $\leq 2$  years) |  
 High capital & operating costs | -0.6% | Global, with concentrated impact in emerging markets |

aging markets and smaller healthcare facilities | Medium term (2-4 years) | Interoperability gaps with EHR ecosystems | -0.5% | North America & EU primarily, with spillover to APAC markets | Medium term (2-4 years) | Semiconductor-sensor supply-chain volatility | -0.4% | Global, with highest impact in Asia-Pacific manufacturing hubs | Short term ( $\leq 2$  years) | Source: Mordor Intelligence |

**Data-Privacy & Cybersecurity Vulnerabilities** Connected devices widen attack surfaces, as reflected in FDA safety communications on vulnerabilities in Contec and Epsimed monitors that permit unauthorized remote control. The Food and Drug Omnibus Reform Act now obliges manufacturers to document patching capabilities and post-market surveillance plans, elevating compliance expenditure. Cyber risks heighten purchasing hesitancy among providers already contending with ransomware, driving preference for vendors offering end-to-end encryption and zero-trust architectures.

**High Capital & Operating Costs** Start-up investment often exceeds immediate budgets, especially where staffing shortages divert funds to human resources. Vizient reports telemetry overuse inflates costs by monitoring low-risk patients who do not meet criteria, driving inefficient bed utilization. Emerging-market hospitals face steeper hurdles given foreign-exchange exposure on imported hardware, slowing penetration despite clinical need. Vendors now promote subscription pricing and software-defined upgrades to spread spending over operating cycles, yet financial constraints still dampen the patient monitoring systems market in resource-limited settings.

\*Our forecasts treat driver/restraint impacts as directional, not additive. The impact forecasts reflect baseline growth, mix effects, and variable interactions.

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**Patient Monitoring Devices Market Segment Analysis** By Product Type: Multi-Parameter Dominance Drives Integration Multi-parameter vital-signs monitors generated 34.78% of 2025 revenue, underscoring provider demand for single consoles that consolidate ECG, SpO<sub>2</sub>, NIBP, and temperature readings in unified dashboards. The patient monitoring systems market size for multi-parameter devices is projected to maintain steady expansion as hospitals replace legacy units with cloud-ready models that enable analytics overlays. Neuro-monitoring devices show the highest 7.65% CAGR through 2031, propelled by AI-enhanced EEG and cerebral oximetry that detect neurological events earlier.

Cardiac monitors, respiratory monitors, and fetal-neonatal systems retain critical roles yet increasingly converge within modular platforms rather than operating as stand-alone units. Advanced hemodynamic modules now pair with algorithmic trend analysis that forecasts hypotension minutes before onset, as seen in BD's HemoSphere Alta launch. This integration minimizes alarm fatigue and simplifies nursing workflows, driving hospitals to favor vendors offering configurable parameter suites over single-purpose tools. As a result, the patient monitoring systems market continues to transition toward platform-based procurement strategies.

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0. **Wearable Revolution Transforms Care Delivery** Bedside monitors still control 46.98% share because ICUs require hard-wired reliability and compatibility with EHR middleware. However, wearable and patch monitors, expanding at 7.92% CAGR, anchor the fastest-growing segment as consumers accept wrist- and chest-based devices for everything from arrhythmia detection to sleep staging. Companies capitalize on smartphone pairing and cloud dashboards to give clinicians granular insights while allowing patients full mobility.

Disposable patches like VitalPatch or Philips BioTel Heart simplify logistics by negating disinfection needs. Battery life improvements and low-power Bluetooth extend continuous operation to seven days or more, boosting adherence. Portable

transport monitors fill intra-facility gaps—ambulances, imaging suites, step-down units—maintaining continuous data streams during patient transfers. Collectively, these shifts steer the patient monitoring systems market toward form factors that blur lines between medical-grade and consumer-grade hardware without sacrificing accuracy.

**By End User: Home-Care Acceleration Reshapes Market Dynamics** Hospitals continue to represent 67.19% of placements in 2025, yet payers now reimburse remote vitals equally to bedside readings, realigning incentives. Home-care settings, growing at 8.12% CAGR, benefit from regulatory momentum around hospital-at-home services, reducing inpatient congestion. Ambulatory surgical centers expand procurement as outpatient volumes rise, using compact monitors to oversee post-anesthesia recovery before same-day discharge.

Long-term care facilities also upgrade capabilities to track frailty indicators such as weight loss and nocturnal hypoxia. Masimo's donation of Stork baby monitors to NICU parents signals broader penetration into niche home applications. Taken together, these trends diversify revenue away from inpatient wards, widening the patient monitoring systems market footprint across the full continuum of care.

**Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.** By Application: **Neurology Innovation Drives Fastest Growth** Cardiology retains 27.72% of 2025 revenue as arrhythmia detection and hemodynamic trending remain standard across medical-surgical floors. Neurology, at an 8.34% CAGR, accelerates on the back of real-time cerebral oximetry and non-invasive intracranial pressure monitoring that inform stroke and traumatic brain-injury management. The patient monitoring systems market size for neurology applications is poised to benefit from FDA-cleared AI algorithms that predict seizures minutes before onset.

Respiratory applications grow with post-Covid emphasis on ventilation oversight and sleep-disorder screening. Critical-care bundles integrate multi-parameter, cardiac-output, and brain-monitoring modules into a single bedside unit, emphasizing holistic physiology. Diabetes and metabolic tracking mature through closed-loop glucose platforms, hinting at future crossover where monitors trigger therapy, reinforcing feedback loops that yield better outcomes.

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**Geography Analysis** **North America Patient Monitoring Devices Market** North America leads with 42.23% share, supported by reimbursement parity for remote vitals, FDA fast lanes, and enterprise IT funding that earmarks 41% of budgets for monitoring upgrades. Mayo Clinic's program proves clinical equivalence for hospital-at-home, influencing regional insurers to authorize wider deployments.

**APAC Patient Monitoring Devices Market** Asia-Pacific, forecast at 7.56% CAGR, benefits from telehealth pilots in China where government mandates aim to address rural access gaps and accelerate the patient monitoring systems market. India's digital-health roadmap targets USD 25 billion by 2025, underpinning broad sensor rollouts in primary-care outposts. Geriatric health spending topping USD 20 trillion between 2015-2030 underscores long-run demand.

**EMEA and South America Patient Monitoring Devices Market** Europe experiences steady adoption through EU cybersecurity harmonization and value-based procurement short-listing vendors with predictive-analytics proof. South America and the Middle East & Africa remain nascent but attractive; as macroeconomic stability improves, public-private partnerships seed first-wave installations in tertiary hospitals.

Mordor Intelligence provides coverage of the patient monitoring devices market across other key regional markets, including Europe, each with their regulatory frameworks and demand patterns. Detailed country-level analysis extends to India

incorporating local coverage and market participation, as required.

## Competitive Landscape

The patient monitoring systems market shows moderate consolidation: Philips, GE HealthCare, Medtronic, and Masimo control sizable global footprints, continuously adding AI layers and cloud ingestion pipelines. BD's USD 4.2 billion acquisition of Edwards Lifesciences' Critical Care Unit deepens its smart-connected-care lineup, while Stryker's planned purchase of care.ai introduces ambient intelligence to its hospital beds.

Strategic alliances feature prominently. Medtronic and Philips joined forces in July 2025 to co-develop interoperable ecosystems that validate sensors across both portfolios. GE HealthCare's Portrait VSM secured FDA clearance to refresh vital-sign monitoring with mobile tablets that feed Capsule connectivity hubs.

Emerging players exploit wearables, AI-analytics platforms, and subscription SaaS to lighten capex loads. Cybersecurity compliance raises entry barriers, favoring incumbents with established quality systems. Still, niche innovators like Mespire LifeSciences carve paths via lower-cost cerebral oximetry, illustrating room for specialized disruption.

## Patient Monitoring Devices Industry Leaders\* Abbott Laboratories

\* Boston Scientific Corporation

\* GE Healthcare

\* Johnson & Johnson

\* Becton, Dickinson and Company

\* \*Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0. Patient Monitoring Devices Market Companies Covered in this Report\* Koninklijke Philips

\* GE HealthCare Technologies Inc.

\* Medtronic

\* Nihon Kohden

\* Mindray

\* Masimo

\* Drägerwerk

\* Baxter International Inc. (Hillrom)

\* Abbott Laboratories

\* Dexcom

\* OMRON

\* Zoll Medical Corporation (Asahi Kasei Group)

\* Schiller

\* Honeywell International Inc. (Life Care Solutions)

\* BIOTRONIK

\* Contec Medical Systems

\* AliveCor

\* Welch Allyn (Baxter)

\* Garmin

\* Capsule Technologies (Philips)

Recent Industry Developments in Patient Monitoring Devices Market\* July 2025: Medtronic and Philips announce partnership to expand access to monitoring technology, introducing a joint product-validation pledge

\* April 2025: BD launches HemoSphere Alta with AI-powered Cerebral Autoregulation Index to preempt hypotension

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Global Patient Monitoring Devices Market Report ScopeAs per the scope of this report, patient monitoring devices are monitoring devices that continuously monitor the patient's vital parameters, like blood pressure and heart rate, by using a medical monitor and collecting medical (and other) data from individuals. The patient monitoring market is segmented by type of device (hemodynamic monitoring devices, neuromonitoring devices, cardiac monitoring devices, multi-parameter monitors, respiratory monitoring devices, remote patient monitoring devices, and other types of devices), application (cardiology, neurology, respiratory, fetal and neonatal, weight management and fitness monitoring, and other devices), end user (home care settings, hospital and clinics, and other end users), and geography (North America, Europe, Asia-Pacific, Middle East and Africa, and South America). The report also covers the estimated market sizes and trends for 17 countries across major regions globally. The report offers the value (in USD) for the segments mentioned above.

By Product TypeMulti-parameter vital-signs monitors |

Cardiac monitoring devices |

Hemodynamic monitors |

Respiratory monitors |

Fetal & neonatal monitors |

Neuro-monitoring devices |

Temperature & weight monitors |

By PortabilityBedside / fixed monitors |

Portable / transport monitors |

Wearable / patch monitors |

By End UserHospitals |

Ambulatory Surgical Centers |

Home-care Settings |

Long-term Care Facilities |

By ApplicationCardiology |

Respiratory |

Neurology |

Critical Care |

Diabetes & Metabolic |

Other Applications |

By GeographyNorth America | United States |

| Canada |

| Mexico |

Europe | Germany |

| United Kingdom |

| France |

| Italy |

| Spain |

| Rest of Europe |

Asia-Pacific | China |

| India |

| Japan |

| South Korea |

| Australia |

| Rest of Asia-Pacific |

South America | Brazil |

| Argentina |

| Rest of South America |

Middle East and Africa | GCC |

| South Africa |

| Rest of Middle East and Africa |

By Product Type | Multi-parameter vital-signs monitors |

| Cardiac monitoring devices |

| Hemodynamic monitors |

| Respiratory monitors |

| Fetal & neonatal monitors |

| Neuro-monitoring devices |

- | Temperature & weight monitors |
- By Portability | Bedside / fixed monitors |
- | Portable / transport monitors |
- | Wearable / patch monitors |
- By End User | Hospitals |
- | Ambulatory Surgical Centers |
- | Home-care Settings |
- | Long-term Care Facilities |
- By Application | Cardiology |
- | Respiratory |
- | Neurology |
- | Critical Care |
- | Diabetes & Metabolic |
- | Other Applications |
- |
- By Geography | North America | United States |
- | | Canada |
- | | Mexico |
- | |
- | | Europe | Germany |
- | | United Kingdom |
- | | France |
- | | Italy |
- | | Spain |
- | | Rest of Europe |
- | |
- | | Asia-Pacific | China |
- | | India |
- | | Japan |
- | | South Korea |
- | | Australia |
- | | Rest of Asia-Pacific |
- | |
- | | South America | Brazil |
- | | Argentina |
- | | Rest of South America |
- | |
- | | Middle East and Africa | GCC |
- | | South Africa |
- | | Rest of Middle East and Africa |

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Key Questions Answered in the ReportWhat is the 2025 valuation of the patient monitoring systems market? The market stands at USD 50.53 billion in 2025.

Which product category currently holds the highest share? Multi-parameter vital-signs monitors lead with a 34.78% share.

Which region is projected to grow the fastest through 2030? Asia-Pacific, with a forecast 7.56% CAGR.

Why are wearable and patch monitors gaining traction? They enable continuous, non-invasive monitoring that supports hospital-at-home and chronic disease management programs.

What major challenge could slow adoption? Cybersecurity vulnerabilities that increase compliance costs and purchasing hesitancy.

Which application segment shows the highest growth rate? Neurology, advancing at an 8.34% CAGR through 2030.

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