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Table of Contents

On-Body Wearable Device Market Analysis

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28 min read

Project Details

Research Outline: [On-Body Wearable Device Market Analysis](#)

Part
01
of two

Who are some players in the stick-to-skin on-body wearable devices?

Key Takeaways

- The NFC/Bluetooth fever patches from GENTAG, a U.S.-based company, are designed for the fever monitoring of patients.
- The Zio Monitor from iRhythm Technologies, which is headquartered in the United States, is designed for monitoring the heart health of patients.
- The Gx Sweat Patch from Epicore Biosystems, Inc., a U.S.-based company, tracks the user's physical performance through their sweat.

Introduction

Ten key players creating stick-to-skin on-body wearable devices for medical users in the United States include GENTAG, Inc., VivaLNK, Inc., iRhythm Technologies, Inc., Blue Spark Technologies, the Insulet Corporation, LifeSignals, Inc., SPR Therapeutics, Medtronic, Philips Biotelemetry, and Leaf Healthcare, Inc. Meanwhile, ten key players creating stick-to-skin on-body wearable devices for consumer use in the United States include X2 BioSystems, the L'Oreal Group, Epicore Biosystems, Inc., the CareWear Corporation, Lief Therapeutics, Nix Biosensors, Kalio, Dexcom, Inc., Hinge Health, Inc., and Abbott Laboratories. Each of these companies have been mentioned as key players in the United States by various industry and market research reports on the stick-to-skin on-body wearable devices market. In the area below, the findings from the research have been presented. Additionally, the research strategy employed by the research team to identify key players has also been provided.

Players in the Stick-to-Skin On-Body Wearable Devices

Medical Use

1. GENTAG, Inc

- This company operates as a visionary IP and technology business focused on the development of wearable sensors for proactive medicine, nutrition, diagnostics, etc. It is headquartered in Washington, D.C. A link to the official website of GENTAG, Inc. is available [here](#).
- GENTAG, Inc. has developed and marketed a variety of stick-to-skin on-body wearable devices for medical use, including for measuring patients' temperatures, diabetes monitoring, cosmetics and skin health, cardiac patches, etc. For example, the company offers its patented NFC/Bluetooth fever patches and Optical fever patches for fever monitoring, which can also be utilized by consumers. These patented, disposable fever patches present temperature readings to medical professionals without causing discomfort or disturbance to patients.



Source

2. VivaLNK, Inc.

- Headquartered in Santa Clara, California, VivaLNK produces connected healthcare solutions designed for both remote and in-patient monitoring. A link to the official website of VivaLNK, Inc. is available [here](#).
- VivaLNK, Inc. produces multiple IoT enabled wearable patches for medical usage, including for monitoring temperatures, cardiac monitoring, etc. The Continuous Cardiac and Heart Patch from VivaLNK, Inc. is an ECG and heart monitoring patch that is capable of live streaming several parameters directly to the cloud or a mobile device, and it has been a part of coronary artery disease, depression stress, and AF detection studies.



[Source](#)

3. iRhythm Technologies, Inc.

- iRhythm Technologies is based in San Francisco, California, and it serves as a digital healthcare business. A link to the official website of iRhythm Technologies, Inc. is available [here](#).
- iRhythm Technologies, Inc. has developed the Zio monitor, which is a patch applied to the wearer's chest area by their physician, or it can be fitted via self-application, for a prescribed wear time. When the wearer feels unusual heart symptoms, they simply press the patch, which is then removed after the prescribed wear time and returned by mail. iRhythm Technologies, Inc. will then analyze the wearer's heart data and create a comprehensive report for the wearer's physician to present a diagnosis and care plan.



[Source](#)

4. Blue Spark Technologies

- Blue Spark Technologies is a provider of continuous vital sign monitoring, and it is based in Westlake, Ohio. A link to the official website of Blue Spark Technologies is available here.
- Blue Spark Technologies offers TempTraq, which is a wearable medical device that provides continuous temperature monitoring for healthcare providers. The device's benefits include earlier fever detection, remote patient monitoring, infection control, and accuracy, among others.



Source

5. Insulet Corporation

- The Insulet Corporation operates as a medical device company that is headquartered in Acton, Massachusetts. A link to the official website of the Insulet Corporation is available [here](#).
- The Insulet Corporation has developed and marketed the OmniPod, a stick-to-skin on-body wearable drug delivery platform that is fully automated. The company claims that the device can satisfy the unique specifications of the wearer's prescribed drug and diminish the possibility of inaccurate and missed dosing.



Source

6. LifeSignals, Inc

- LifeSignals, Inc. is a creator of health and well-being management, silicon-based solutions, and it is headquartered in Milpitas, California. A link to the official website of LifeSignals, Inc. is available [here](#).
- LifeSignals, Inc. has developed a single-use stick-to-skin on-body, multi-parameter patch called the LifeSignals Wearable Biosensor. The patch, which has a seven-day battery life, was constructed using a "patented healthcare silicon chip technology" and can continuously obtain and display core biomedical data.



[Source](#)

7. SPR Therapeutics

- SPR Therapeutics is a provider of peripheral nerve stimulation platform technology, and it is located in [Cleveland, Ohio](#). A link to the official website of SPR Therapeutics is available [here](#).
- SPR Therapeutics offers the [SPRINT PNS System](#), which helps patients suffering from acute post-operative, chronic, back, post-amputation, and shoulder pain. For up to two months, the product [stimulates targeted peripheral nerve fibers](#) and modulates central plasticity in order to create sustained pain relief.

[Source](#)

8. Medtronic

- Headquartered in [Minneapolis, Minnesota](#), Medtronic is a developer of insulin delivery solutions. A link to the official website of Medtronic is available [here](#).
- Medtronic has produced the [Guardian™ Connect](#), a continuous glucose monitoring system that is applied to the users skin via a patch and sends alerts to their mobile device

via a mobile application. The user's glucose levels are transmitted to the mobile application in five-minutes intervals and enables them to seamlessly track when they consume food/beverages, when they exercise, and when their insulin dose has been delivered.



[Source](#)

9. Philips Biotelemetry

- Philips Biotelemetry focuses on the creation of remote monitoring technology, and it is based in Malvern, Pennsylvania. A link to the official website of Philips Biotelemetry is available [here](#).
- The ePatch from Philips Biotelemetry, formerly BioTel Heart, provides a maximum of two weeks worth of continuous ECG recording for the purpose of monitoring the heart rates of patients. It continuously records and transmits the patient's heartbeat, which is analyzed by BioTel Heart's cardiac technicians. Some of its additional features include PVC Morphology, comprehensive narrative summaries from certified cardiac technicians, etc.



[Source](#)

- Wearable technology from the company is responsible for monitoring more than 1 million patients annually, and it logs around 33,000 physician orders each month.

10. Leaf Healthcare, Inc.

- Leaf Healthcare, Inc., which is owned by Smith+Nephew, is a provider of patient monitoring systems. The company is located in Pleasanton, California. A link to the official website of Leaf Healthcare, Inc. is available [here](#).
- Leaf Healthcare, Inc. measures turn frequency and provides visual turn status alerts through the Leaf Patient Monitoring System to assist medical units in developing personalized pressure injury prevention plans. The sensor patch is attached to the user's chest, and it monitors "whether they are sitting, standing or lying down — on their left side, right side, back or prone." It then relays data from the sensor patch through a wireless network to the unit's computer interface.



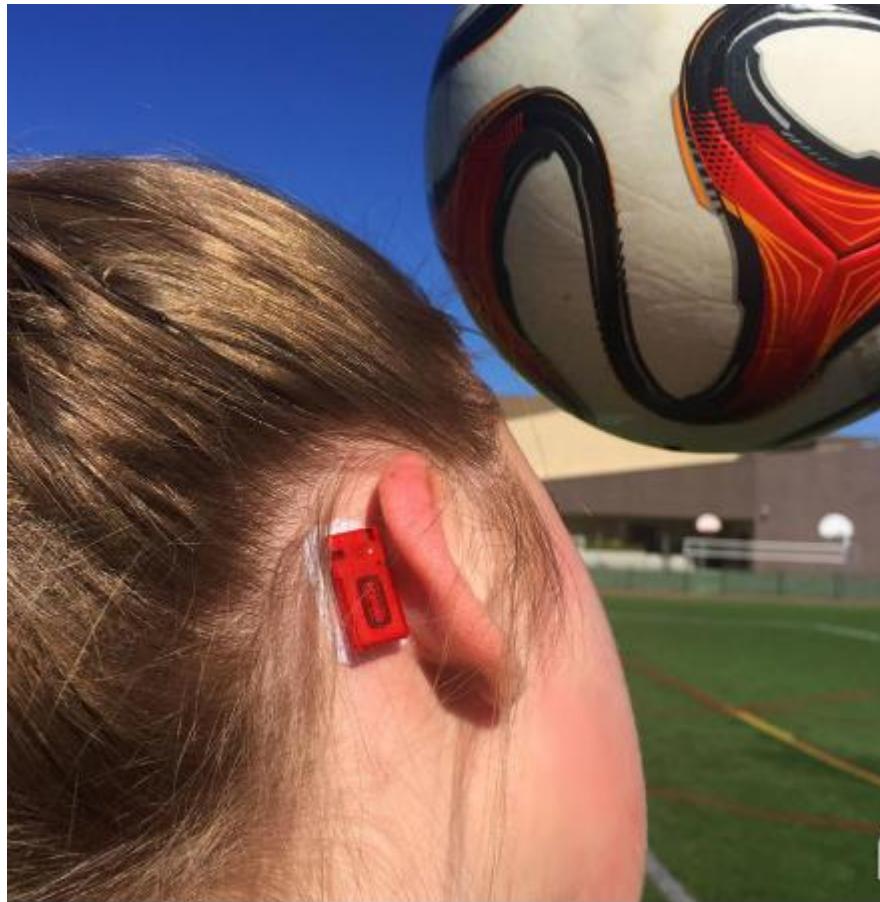
Source

Consumer Use

1. X2 BioSystems

- X2 Biosystems, which is based in Seattle, Washington, provides wearable impact sensors for both concussion detection and management. A link to the official website of X2 BioSystems is available [here](#).

- X2 BioSystems offers a wearable head impact monitoring systems known as the X-Patch and the X-Patch Pro. The patches are utilized in sports at the youth, collegiate, and professional levels and have helped to reduce "the incidence of head impacts that can lead to concussion injuries" by between 30% to 70%. X-Patch Pro is placed behind the player's ear while they are playing or practicing via an adhesive strip, and its sensor records impacts and transmit the information to the user's Sensor Data Management mobile application



Source

2. L'Oreal Group

- The L'Oréal Group is a cosmetics and beauty company that is headquartered in Clichy, France, however, it operates in the United States as L'Oréal USA. The USA business generated \$7.5 billion in revenue in the United States in the year 2020. A link to the official website of the L'Oréal Group is available here.
- The L'Oréal Group offers an ultraviolet sensor through its flexible wearable skin patch called My UV Patch. It utilizes photo-sensitive dyes to help the user track their UV exposure. Throughout the day, the companion app alerts the wearer to scan their patch to receive a UV exposure update and obtain advice on specific lifestyle habits to modify, along with which products from L'Oréal that can assist them in safeguarding their skin.



[Source](#)

3. Epicore Biosystems

- Epicore Biosystems, Inc., a sweat microfluidic sensing solution provider, is based in Cambridge, Massachusetts. A link to the official website of Epicore Biosystems is available [here](#).
- A recent collaboration between Epicore Biosystems, Gatorade, and PepsiCo resulted in the creation of the Gx Sweat Patch, an innovative "personalized performance tracking sweat patch." It is skin-like patch that operates through two micro channels that gather sweat while the user is exercising in order to offer colorimetric insights on their sodium consumption and sweat rate via the companion application.

[Source](#)

4. CareWear Corporation

- The CareWear Corporation is located in the state of Nevada, and it concentrates on providing solutions for pain relief. A link to the official website of the CareWear Corporation is available [here](#).
- The CareWear Corporation specializes in producing wearable therapeutics devices, including skin patches, that supply red light therapy for self-care for both professionals and regular consumers. The Light Patch Clover is a patch that is used in high flexibility

regions and maximizes movement sans restriction. This specific patch supplies PhotoBioModulation therapy, along with gentle heat, to the area to offer temporary pain relief.

[Source](#)

- The Light Patch Small/Medium/Large Butterfly is designed for the foot, face, elbow, neck, hand, wrist, and ankle areas of the body, and it maximizes movement sans restriction. It also supplies PhotoBioModulation therapy and heat for temporary pain relief, along with muscle and joint stiffness, muscle relaxation, local circulation enhancement, and muscle spasm treatment.

[Source](#)

5. Lief Therapeutics, Inc.

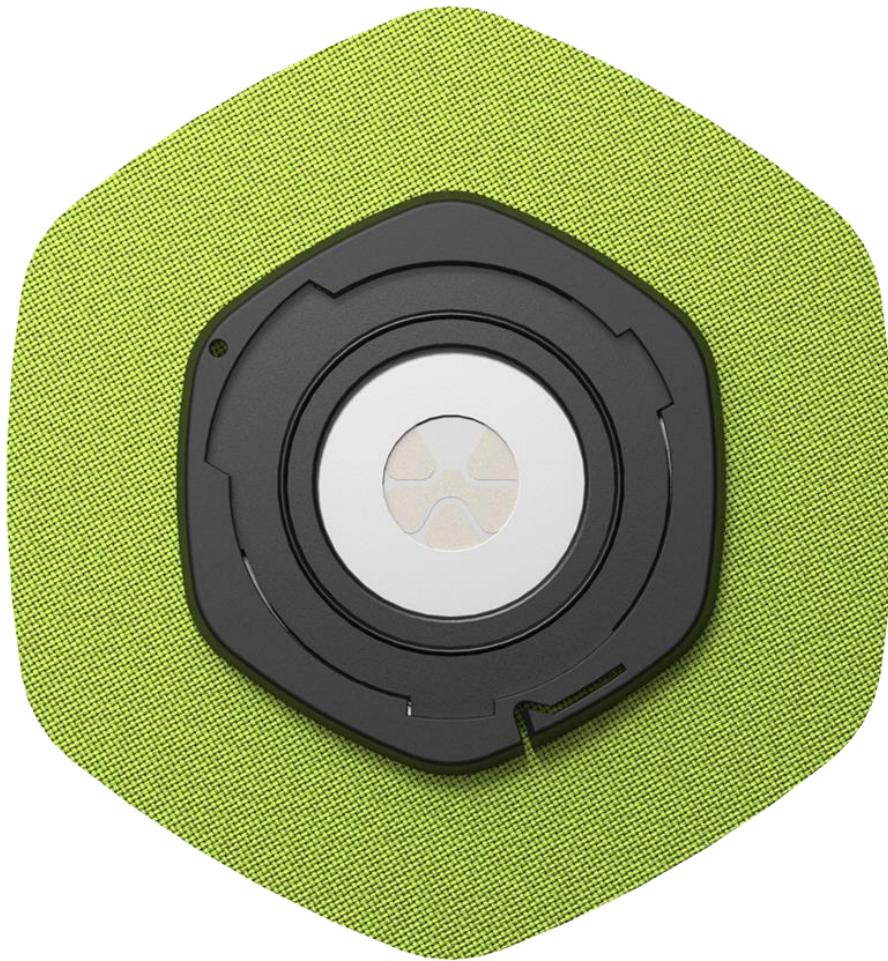
- Lief Therapeutics is based in San Francisco, California. It focuses on creating HRV wearable solutions for stress and anxiety reduction. A link to the official website of Lief Therapeutics, Inc. is available [here](#).
- The Lief product is a HRV wearable that intervenes to de-stress the user's body to improve their mental health. It does this by enhancing the user's heart rate variability and allows them "follow" their heart and to self-regulate.



[Source](#)

6. Nix Biosensors

- Nix Biosensors, a company based in Boston, Massachusetts, produces biosensors to help consumers manage their health. A link to the official website of Nix Biosensors is available [here](#).
- Nix Biosensors manufactures the Nix Hydration Biosensor patch. According to its website, its device and platform "quantifies fluid and electrolyte losses moment-by-moment and sends notifications" to the wearer's mobile devices or bike computer to alert them of when to consume a beverage, the necessary volume, or which beverage to consume.



[Source](#)

7. Kailo

- Headquartered in Sandy, Utah, Kailo is a pain reliever patch provider that has assisted over 1 million consumers globally since its inception. A link to the official website of Kailo is available [here](#).
- The company produces and markets the Kailo pain relieving patch to help consumers properly manage pain. It contains several small capacitors that operate as bio antennas, interacting with the electrical system of the user's body. The patch helps the user to swiftly recover, enhance their flexibility, and retain "a natural range of motion."



Source

8. Dexcom, Inc.

- Dexcom, Inc. is headquartered in San Diego, California, and it manufactures Continuous Glucose Monitoring, or CGM, systems, specifically for ambulatory usage. A link to the official website of Dexcom, Inc. is available [here](#).
- Dexcom, Inc. primarily focuses on producing glucose monitoring systems, such as the Dexcom G6, a small stick-to-skin on-body wearable transmitter. The Dexcom G6 functions by sending the user's glucose figures to a mobile smart device in five-minutes intervals. Through the mobile application, the transmitter alerts the user when their glucose levels are too low or high.



Source

9. Hinge Health, Inc.

- Hinge Health, Inc. is headquartered in San Francisco, California, and it acts as a Digital Musculoskeletal, or MSK, Clinic. A link to the official website of Hinge Health, Inc. is available [here](#).
- Hinge Health, Inc. provides a wearable pain management device named Hinge Health Enso. The device provides electrical nerve stimulation that a randomized study conducted by researchers from the Memorial Sloan Kettering Cancer Center and the University of

California (San Francisco) revealed increases mobility 1.6 times over the control device, while delivering twice the pain reduction.



Source

10. Abbott Laboratories

- Abbott Laboratories is a healthcare company that offers a portfolio of diagnostics, nutritional, and medical device solutions, and the company is headquartered in Abbott Park, Illinois. A link to the official website of Abbott Laboratories is available [here](#).
- Abbott Laboratories has a line of skin patches capable of tracking multiple biomarkers, including lactate, glucose, and ketones. Through its FreeStyle Libre subsidiary, Abbott Laboratories offers the FreeStyle Libre CGM systems (FreeStyle Libre 3, FreeStyle Libre 2, and FreeStyle Libre 2 for Kids), which provide accurate 14-day glucose readings, as well as insights on where the wearer's glucose level is headed.



[Source](#)

Research Strategy

To determine some of the key players in the stick-to-skin on-body wearable devices market in the United States, we leveraged some of the most reputable sources available in the public domain. Our research included searching through market and industry reports on the market that were curated by prominent research groups, including [Grandview Research](#), [Transparency Market Research](#), [Emergen Research](#), [Verified Market Research](#), and [IDTechEX](#), among others. We also scanned through reports, articles, and press releases focused on stick-to-skin wearable devices that were published by trustworthy news, media, and press distribution websites, including tech-focused sources, such as [Forbes](#), [Wearables Technologies](#), [MedTech Dive](#), [PR News Wire](#), [Globe News Wire](#), [Business Insider](#), etc. We also searched for some of the top reviewed stick-to-skin on-body wearable devices by exploring through review and comparison websites. Using these sources, we were able to identify 20 relevant companies based on repetitive mentions as a key player across different reports, articles, etc., along with our analysis of their offerings. Please note that since many of the reports we came across addressed the global market, we conducted further research to identify the headquarters of the key players being mentioned to filter out those not based in the United States or that do not have significant operations in the country.

Research has indicated that there are [several additional key players](#) within the stick-to-skin on-body wearable devices market for medical use, warranting a follow-up to expand upon the list provided in this brief. There is limited additional data available for key players for consumer use.

What are some trends in the stick-to-skin on-body wearable devices?

Introduction

This research provides trends in the consumer and medical segments of stick-to-skin-on-body wearable devices. Medical wearables (used by doctors) and consumer wearables are similar in their working principles. However, the latter is readily available to users for health monitoring purposes since they do not require rigorous performance tests and intricate approval processes. We have provided a list of six trends (current and future combined) for stick-to-skin-on-body wearable devices in the medical segment. The identified trends can drive market growth now and in the near future. Also, reports on the wearable skin patch market are mostly presented based on the industry's current and future market outlook.

For stick-to-skin-on-body wearable devices in the consumer segment, we have provided a list of three trends due to limited information in the public domain. The consumer wearables market is an emerging segment because it has lower demands than clinical applications, and there is an apparent convergence with medical wearables markets.

Known by many names, including skin patches, smart patches, transdermal patches, or electronic skin patches, we have used these terms to address stick-to-skin-on-body wearable devices in this report. We have presented our findings below, and in the 'Research Strategy' section, we explain the logic used during the research.

Trends: Medical Stick-to-Skin on-Body Wearable Devices

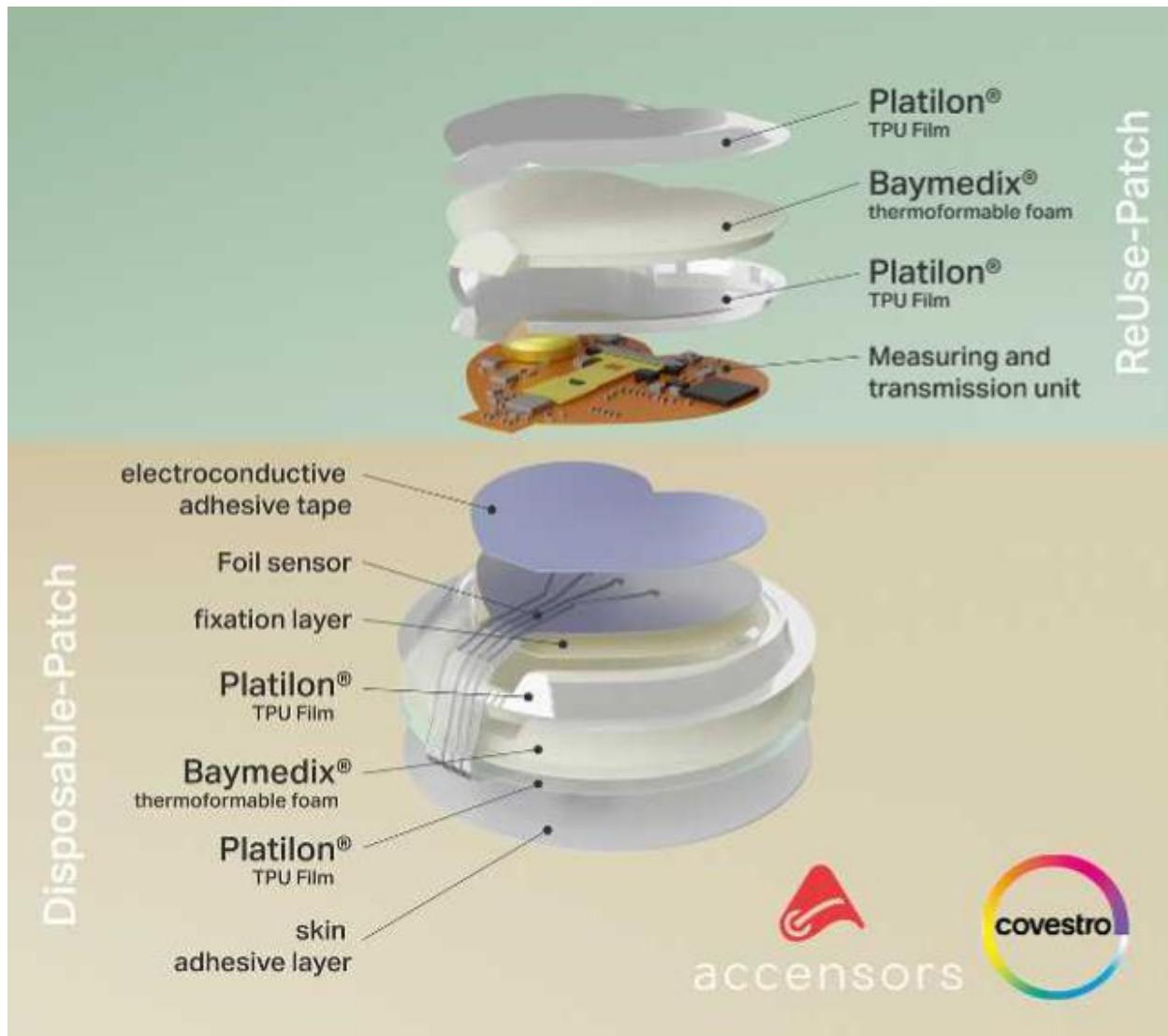
Adaptable functionalities, miniaturization, improved comfort, and sustainability qualities are some trends in the stick-to-skin-on-body wearable devices' industry.

Miniaturization

- Most of the smart patches presently used to monitor vital signs are relatively large and can be uncomfortable to wear. According to a study, the trend toward miniaturization of this device is strengthening the market's projected growth.
- People want comfort in everything, including wearables. Excessive itching, irritation, and pain related to removal should be minimal, and the system design, such as size, determines how comfortable a device is.
- For patients' comfort, smart patches should be as small, adaptable, and unobtrusive as they can be. Development in miniaturization is one of the drivers for the trend toward small, thin, and flexible devices, making wearable devices almost invisible and inconspicuous.
- The medical sector has gained from this with innovations such as electronic thin patches for managing diabetes, monitoring glucose levels, and injecting insulin, in some cases.
- Covestro, in partnership with accensors, created an entirely new design for wearable smart patches that address these concerns. According to Eike Kottkamp (CEO, innoMe

GmbH / accensors), “our solution is a huge advantage to patients as it opens a new door for remote monitoring, and it is very thin, soft, and comfortable.”

- As an advantage of current innovations in miniaturization, MIT researchers produced a postage-stamp-sized adhesive ultrasound patch so that patients can live everyday lives; simultaneously as the device monitors their vital signs.



Source

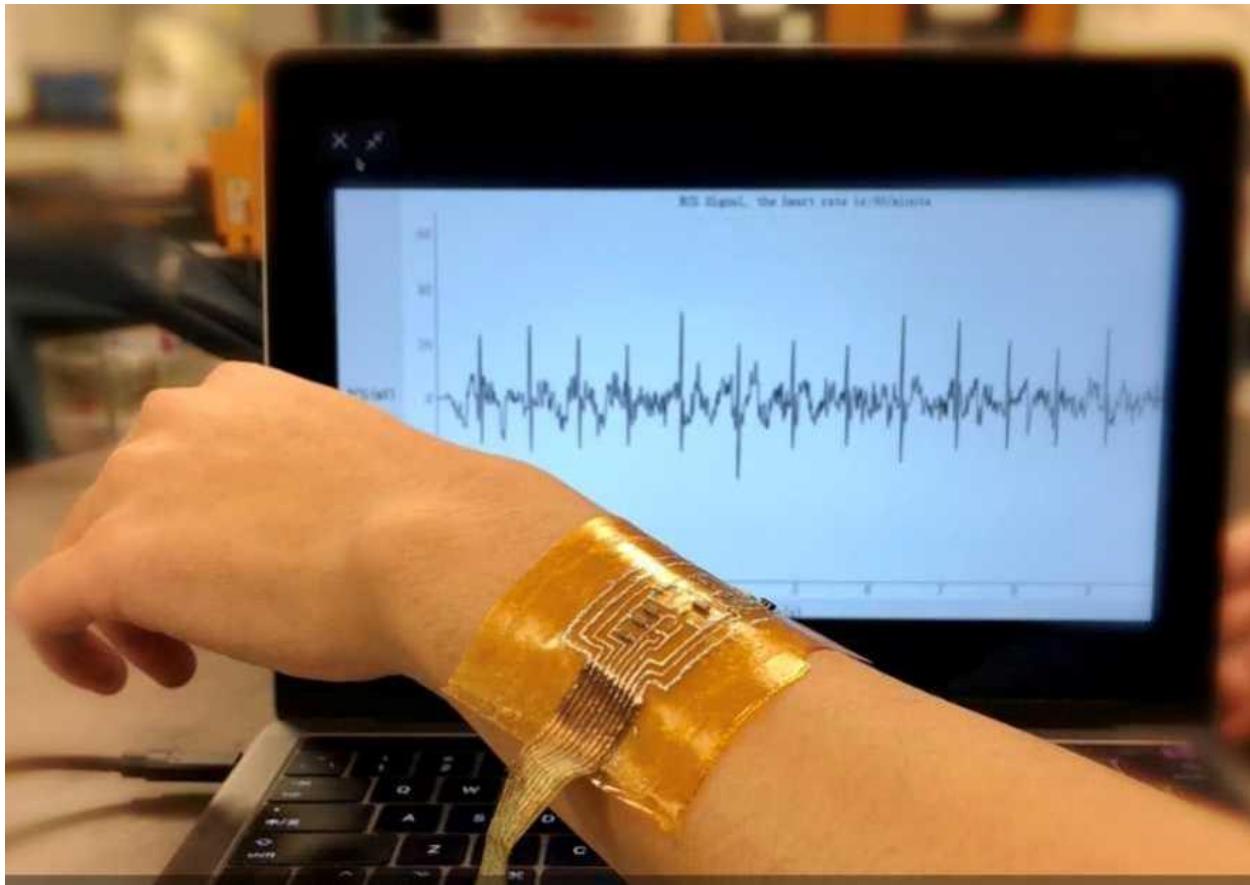
Increasing Functionalities

- A key driver for the stick-to-skin on-body wearable devices market growth is the predominance of chronic diseases such as blood pressure, cardiac disorders, diabetes, and obesity. Necessitating the demand to lessen the risk factors and has emphasized the need for non-invasive wearables to monitor patients' vital parameters daily.

- These non-intrusive devices are stuck on the human skin for the specific purpose of a single indication, such as drug delivery, diagnosis, or health monitoring. With electrocardiogram technology, which directly tracks the heart's electrical activity, smart patches that monitor heart rate inconsistency provide more accurate data than smartwatches.
- More comprehensive medical information is now possible by incorporating data from smart patches with smartwatches and smartphone apps. With interoperability capabilities, physicians can access wearable health data on a patient's record to advise diagnosis and care.
- Philips' wearable biosensor enables patients to live their everyday lives, while the self-adhesive patch gathers data on their vital signs, such as heart rate, temperature, respiratory rate, and movement. The device recorded an 89% decrease in patients' relapse into respiratory or preventable cardiac arrest, according to Augusta University Medical Center research.
- Various companies — giants and startups alike — are designing new functionalities for medical wearables to meet the increasing need. With more innovation and accuracy, wearables will monitor a more comprehensive array of health indicators and conditions will be monitored, and chances are that regulators will approve additional functionalities.

Sustainable & Skin-Friendly Materials

- Beyond comfort and functionality, wearable electronics should leave a minimal environmental footprint. The trend for wearables made from environmentally friendly, recyclable materials has emerged to minimize environmental pollution resulting from the disposal of wearable devices.
- Since stick-to-skin medical patches are designed to be temporal, they must be easy to discard without harm to the skin or the environment. Thomas Silva (Global Business Development Manager for Medical Wearable Devices at Henkel Adhesive Technologies) stated that "medical devices are evolving quickly, becoming smaller, with increasing demand for functionality and flexibility, while ensuring that the ingredients used are dermatologically safe."
- Researchers at Penn State created a variety of innovative, energy-generating, and sustainable medical sensors that monitor vital signals in patients to detect diseases or even help advise medication. Huanyu "Larry" Cheng (Engineering Professor at Penn State) stated the significant need for environmentally friendly, self-charging sensors for monitoring vital signs with no physical or financial stress.
- The device uses a small skin patch made from cheap, widely available tissue paper. According to Cheng, "all the materials used can be recycled when the device is no longer needed."
- To minimize the effects of repeated chemotherapy and radiotherapy in melanoma patients, researchers at Purdue University developed a unique wearable patch with fully miniaturized needles. According to Chi Hwan Lee (Assistant Professor of biomedical engineering and mechanical engineering at Purdue), "cancer therapeutic is continuously and sustainably delivered as the silicon nanoneedles dissolve slowly and steadily."



[Source](#)

Electronic Skin

- Electronic skin (e-skin) is a flexible and wearable electronic system with similar functionalities and mechanical qualities as human skin. E-skin is gaining heightened interest in health monitoring, prostheses, and soft robots.
- With excellent stretching, recycling, self-healing, and reconfiguration capabilities, the device easily incorporates the skin to monitor physical activities and health conditions. Human-computer interfaces, VR, and AR reality experiences are also improved. The 100% recyclability of this wearable offers a sustainable alternative to other wearables by significantly lowering electronic waste and environmental pollution.
- A recent, in the pursuit of a "skin-like" wearable, professors at Stanford University developed a type of polymer that lights up and retains its brightness even when stretched. The bright, stretchy technology is expected to unlock many innovative ways of enhancing health and fitness.
- According to Zhenan Bao, Ph.D. (Chemical Engineer at Stanford), “future versions of the light-up material should be able to measure more parameters than current wearables. It should be able to measure signals such as cortisol levels or the sound of someone’s breathing to determine true stress or simple heart rate fluctuation.”

- The wearable is also expected to change the use of electronics. A three-dimensional interface generated from skin-like displays and sensors would enable a doctor to examine a part of the body, even from a distance. While still under study, Bao forecasts that its medical and commercial use will be possible in about five years.
- Due to the increasing demand for wearable devices and high preference, the electroactive polymers sector will likely generate a steady revenue CAGR between 2020 and 2027. The e-skin patch market is projected to increase to more than \$27 billion by 2033.

Batteryless and Wireless

- A significant challenge with wearables is power management. Rigid and cumbersome batteries and electronic elements have compromised the functionality and flexibility of many skin-interfaced sensor systems. The most commonly used power source depends on energy storage elements, like batteries, which are usually bulky and unsuitable for wearable electronics. Also, commercial rechargeable batteries have strong acid or base electrolytes, which are unsafe during use.
- Scientists at CU Boulder created a wearable device that generates power from the human body. By drawing from a person's natural heat, the device leverages thermoelectric generators while in contact with the skin to transform the body's internal temperature into electrical energy.
- According to Jianliang Xiao (Associate professor at CU Boulder), the aim is to power wearable devices without batteries in the future. As durable as biological tissue, the device can be nipped together when torn, and each component is reusable.
- Using batteries to power wearables is not very sustainable, according to Wei Gao (Assistant professor at Caltech). Hence, the need to use bio fuel cells powered by a waste product from the body.
- Human sweat contains lactate, a by-product continually generated during normal metabolic processes and exercise. As fuel cells in the e-skin absorb the lactate chemical and mix it with atmospheric oxygen, sufficient energy is generated to power sensors and a Bluetooth device.



Source

Pain Relief Industry Growth

- The United States is rising as the most profitable regional market for stick-to-skin materials, with most of the country's population changing from nicotine to medical adhesive patches for relief and hormonal imbalance. In the transdermal patches market, the United States is expected to hold the highest share owing to the majority of the population experiencing pain and other chronic diseases, supportive healthcare policies, and a developed healthcare market.
- The growth of the stick-to-skin materials industry in the country can be attributed to an increase in healthcare awareness, the gains of non-invasive surgery, and the growing aging population. Also, the government's continual investment in drug research will create opportunities for transdermal medicines or patches, resulting in market growth. For example, 11 grants were approved by the USFDA in 2021 for clinical trials to develop new medical products to treat rare diseases.
- The U.S. stick-to-skin materials market is projected to provide an opportunity of \$692.4 million between 2022 and 2032, with North America generating more than 30.3% of the market share worldwide.
- The continued increase of pain-related conditions, like rheumatoid arthritis, osteoarthritis, diabetic neuropathy, and migraine among the populace, contributes to the sector's growth. For example, back pain is common among U.S. adults, and 85% of the public will suffer mechanical lower back pain sometime in their life. Therefore, the growing burden of

back pain within the country is expected to increase the need for pain relief patches, such as Hinge Health.

- According to the American Migraine Foundation, migraine affects almost 39 million Americans, with possibly higher actual numbers since many people do not get diagnosed. A common ailment, migraine, is expected to increase the demand for medical patches for pain relief.
- About 40 million adult Americans smoke cigarettes, while 5.22 million high school students and 1.34 million middle school students have ever used a tobacco product, including electronic cigarettes. This growing number is likely to increase the demand for nicotine-transdermal patches in the country.



Source

Trends: Consumer Stick-to-Skin on-Body Wearable Devices

Increasing Use in the Professional Sports/Athletes Industry

- While the medical sector uses smart patches extensively for diagnosis, other sports and recreation applications are evolving.
- The growing use of wearable technologies is a trend that is expected to drive growth in the wearable patch market. The increase of wearable device sales in sports is predicted to drive the wearable adhesive market to \$617.43 million by 2026. In 2022, sales of stick-to-skin materials proliferated due to the high demand for wearables devices, with the sports and healthcare sectors accounting for a collective market share of 60%.

- Over 100 million wearable units were shipped in the first quarter of 2021. The second quarter recorded a 34.4% growth in sales over the same quarter in the previous year. Besides smartwatches, the fastest growth came from “other forms,” which comprise wearable patches, digitally connected rings, and audio glasses, recording a 55% increase year-over-year.
- According to Jitesh Ubrani (Research Manager for IDC Mobile Device Trackers), “newer form factors are beginning to gain some footing. Wearable patches, rings, and audio glasses have begun to distinguish themselves by offering obscure yet functional technology.” The demand for smart devices continues to rise as more people become physically active.
- The sports industry has witnessed the rise of a new trend of innovative wearables like smart patches that measure sweat rate, electrolyte, body temperature, sodium, potassium, and Ph, as it taps into the personalization movement. Beyond measuring glucose levels, new biosensors capable of measuring new indicators for optimizing health and fitness are emerging.
- The FLOWPATCH — by FLOWBIO — is the first real-time sweat-sensing platform globally. The device is unraveling the next level of human performance data by beginning with total body fluid and electrolyte loss. FLOWPATCH recognizes each user's baseline and measures real-time data while the athlete works out.
- Gatorade's Gx Sweat Patch is a product that leverages data from an athlete's sweat rate and electrolyte concentration obtained directly from the skin to make recovery recommendations. An athlete's sweat profile, in combination with scenario-specific details like weather, activity type, intensity, and duration, is used to generate customized hydration suggestions pre-, post-, and during exercise.

The Future of Cosmetics

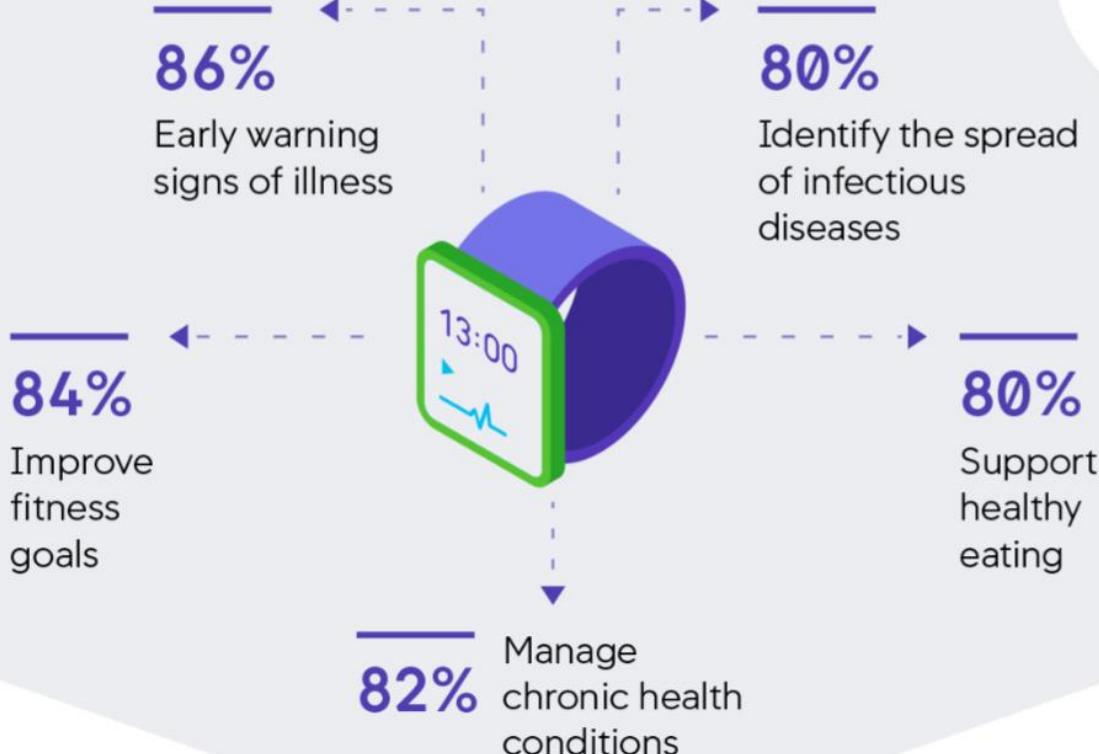
- TechSci Research reported in 2017 that the cosmetic industry's increased adoption and acceptance of the smart patch industry in the following years would be a trend.
- In 2019, L'Oréal launched a test version of its wearable — MySkin Track UV — a device that tracks the skin's acidity as part of a skincare routine. La Roche-Posay, L'Oréal's skincare brand, introduced the device to dermatologists in the U.S. with hopes of gathering data before releasing a direct-to-consumer (DTC) product.
- The precise sensor measures individual UV exposure levels while the app tracks pollen, pollution, and humidity exposure. The device enables users to make educated choices about their skin. According to Guive Balooch (Global Vice President and Head of L'Oréal's Technology Incubator), “the battery-free sensor was designed to seamlessly incorporate into the life and daily routine of its user, enabling users to make smart, sun-safe choices.”
- Wrinkle patches, such as Wrinkles Schminkles, are thin sheets of silicone used for smoothing out wrinkles. Dr. Hadley King (Board-Certified Dermatologist) stated that “wrinkle patches are non-invasive alternatives for folding lines. They minimize transepidermal water loss, which keeps the skin hydrated and better able to self-repair and produce collagen.”

- In 2021, Amorepacific, a South Korean cosmetic brand, revealed plans to partner with MIT scientists in developing a wearable skin-measuring device. The sweat-proof patch will comfortably stick to the user's skin and measure the skin's condition. The company aims to leverage this e-skin technology in producing more responsive, situation-appropriate cosmetics.

Increasing Use in the Fitness Industry

- In an article by CNBC in 2017, patches were said to be catching on. Kate McCarthy (Senior Analyst at Forrester Research) called it an “evolutionary technology” with a potentially huge market. Companies like Lief Therapeutics and Kenzen in the U.S. market were expected to be the key drivers of the global market, wagering on a prevailing economic logic in healthcare — that prevention can be cheaper than cure.
- The fitness industry has come a long way. It is booming with skin patches, sweat sensors, smart clothing, and contact lenses. Consumer demand stemming from a desire to monitor their health better has driven the wearables market at an anticipated compound annual growth rate of 18%. 90% of respondents in a survey alluded to using their wearables to track their fitness and monitor health. Now, consumers are seeking the best thing away from the smartwatch.
- According to experts, the electronic skin patch market will reach \$18 billion by 2027. Scientists are working on skin-adhesive sensors that allow exercisers to go without their devices for a day. Samsung's Advanced Institute of Technology Researchers have designed a stretchy device that feels “like human skin” and displays biometric data without transferring it to an external device.
- According to Ranjit Atwal (Senior Research Director at Gartner), “although adoption of smart patches has been low, the shift to e-health initiated by the COVID-19 pandemic will boost its demand and change consumer’s perception.” The Lief product by Lief Therapeutics is an HRV wearable solution that minimizes stress and anxiety, enhancing mental health.
- A survey by IDC found that users of wearables in the U. S. are ready to switch brands in the future given depending on factors such as battery life, lower cost, and Integration with other devices. Battery life has been a long-standing issue for wearables, although users have come to accept it. Users also want to integrate their wearables with other devices, indicating that they are part of an ecosystem that delivers seamless experiences.
- According to Ramon T. Llamas (Research Director for Wearables at IDC), “the readiness to change brands can be an opportunity as well as a challenge for companies in the space.” It would be an opportunity for stick-to-skin-on-body wearable devices that communicate wirelessly without batteries, it would be an opportunity. New versions of fitness trackers will benefit from the use of e-skin. Jeehwan Kim (Associate Professor at MIT) stated that their newly created wearable sensor is not “power-hungry” and does not require a chip or battery to transmit information.

The health benefits consumers want most from their wearable devices:



Research Strategy

We leveraged some of the most reputable sources available in the public domain, including [Covestro](#), [IEC](#), [ScienceDaily](#), [TheScienceBreaker](#), and [Deloitte](#), among others, to provide the requested information on trends in stick-to-skin on-body wearable devices in the consumer and medical segments. We also scanned through reports, articles, and press releases focused on stick-to-skin wearable devices published by reliable news, media, and press distribution websites, including tech-focused sources, such as [GlobeNewswire](#), [CNN](#), and [Design News](#). We leveraged trends cross-referenced from multiple reputable sources or had data illustrating their current/future impact.

Our team has provided a list of six trends (current and future combined) for stick-to-skin-on-body wearable devices in the medical segment. The identified trends can [drive market growth](#) now and in the near future. Also, reports on the wearable skin patch market are mostly presented based on the industry's [current and future market outlook](#).

For stick-to-skin-on-body wearable devices in the consumer segment, we have provided a list of three trends due to limited resources in the public domain. The consumer wearables market is an emerging segment because it has lower demands than clinical applications, and there is an apparent convergence with medical wearables markets. Our review of key players in the industry in the United States — CareWear Corp, Nix Biosensors, Kailo Labs, Epicore Biosystems, and others — for trends within the market was unsuccessful. A careful search through medical publications such as PLOS Medicine, the American College of Sports Medicine® (ACSM), and the National Library of Medicine (NLM) did not reveal trends but mentioned the high probability of consumer wearables, like many other technological trends, fading into obscurity.

Given the precise nature of the topic and the limited availability or unavailability of more recent reputable sources, we have referenced some slightly dated resources, in some instances, to corroborate and add robustness to the findings. In some cases, we have provided data relating to the global industry where data specific to the United States is limited or unavailable.

Did this report spark your curiosity?

Start Wondering

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