

# **Global RTLS Market for Healthcare Size, Share & Forecast, by Hardware (Tags/Badges and Readers/Trackers), by Technology (RFID, Wi-Fi, UWB, BLE, Infrared, Ultrasound, Zigbee, and Rubee), by Application (Inventory/Asset Tracking and Personnel Monitoring), by Facility Type and Regional Forecasts, 2025-2035**

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## **Abstracts**

The Global RTLS (Real-Time Location System) Market for Healthcare is valued approximately at USD 2.3 billion in 2024 and is expected to grow at a compound annual growth rate (CAGR) of 19.60% over the forecast period 2025–2035, reaching nearly USD 16.47 billion by 2035. RTLS technologies have swiftly transitioned from optional tools to indispensable infrastructure in modern healthcare systems. These systems employ tags, sensors, and wireless networks to track assets, medical equipment, and personnel in real-time, providing actionable intelligence that enables hospitals to streamline operations, enhance patient safety, and reduce costs. The demand for RTLS solutions is fueled by the accelerating digital transformation in healthcare, increasing emphasis on patient flow optimization, and the urgent need to reduce operational inefficiencies across hospitals and clinics. In addition, the adoption of connected healthcare technologies and the integration of IoT-driven analytics are accelerating the shift toward smarter healthcare facilities, amplifying the use of RTLS solutions globally.

The surge in demand for advanced patient monitoring and asset management solutions has pushed the RTLS market into a new growth phase. Hospitals are increasingly leveraging RTLS to monitor patient movement, prevent equipment loss, and ensure compliance with hygiene standards. According to the World Health Organization (WHO), hospitals that implement asset tracking systems report up to 25% improved

utilization rates of medical devices, demonstrating tangible returns on technological investments. Moreover, as healthcare systems face growing patient loads and staff shortages, RTLS technologies are enabling automation-driven efficiency and improved workflow visibility. The expansion of cloud-based RTLS platforms, coupled with AI-powered data analytics, is also opening lucrative opportunities for vendors to deliver scalable and intelligent tracking solutions tailored for healthcare environments. However, data privacy concerns and the high cost of system integration continue to pose challenges, particularly for small- and mid-sized healthcare facilities.

The detailed segments and sub-segments included in the report are:

By Hardware:

Tags/Badges

Readers/Trackers

By Technology:

RFID

Wi-Fi

UWB

BLE

Infrared

Ultrasound

Zigbee

Rubee

By Application:

Inventory/Asset Tracking

Personnel Monitoring

By Facility Type:

Hospitals

Clinics

Long-Term Care Facilities

Laboratories

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

## Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

## Latin America

Brazil

Mexico

## Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

## Hardware Components Expected to Dominate the Market

Hardware components, particularly tags and readers, are expected to dominate the RTLS healthcare market over the forecast period. The surge in demand for RFID-based tags and BLE beacons has been central to this dominance, as they form the foundation of every RTLS ecosystem. Hospitals increasingly deploy these hardware solutions to

track movable assets such as infusion pumps, wheelchairs, and ventilators, ensuring their optimal utilization and preventing misplacement. Tags and readers not only enable real-time location tracking but also provide insights into usage frequency and maintenance requirements. The market's hardware segment continues to expand due to innovation in miniaturized sensors, enhanced battery life, and hybrid communication technologies, allowing seamless operations even in complex hospital environments.

### RFID Technology Leads in Revenue Contribution

RFID (Radio Frequency Identification) technology currently holds the largest share of the global RTLS healthcare market in terms of revenue contribution. Its widespread adoption stems from its proven reliability, scalability, and cost-effectiveness in large-scale hospital deployments. RFID enables automatic identification and tracking of assets without requiring line-of-sight visibility, making it ideal for dynamic hospital environments. Wi-Fi and UWB technologies, on the other hand, are rapidly gaining momentum as next-generation solutions that deliver higher precision and real-time analytics. While RFID remains the market leader due to its maturity and affordability, technologies such as BLE and UWB are poised to witness the fastest growth during the forecast period, driven by their superior accuracy and integration with smart hospital systems. This dual dynamic—RFID's dominance and UWB's acceleration—reflects a market transitioning toward a multi-technology RTLS ecosystem.

The key regions considered for the Global RTLS Market for Healthcare include North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. North America currently holds the lion's share of the market, propelled by the widespread adoption of healthcare automation, strong IT infrastructure, and the presence of leading solution providers in the U.S. and Canada. Government initiatives promoting smart healthcare facilities and digital transformation are also contributing to regional growth. Conversely, the Asia Pacific region is forecasted to witness the fastest growth, driven by rapid hospital infrastructure expansion, increased investment in digital health technologies, and the growing focus on patient safety and operational efficiency in countries like China, India, and Japan. Europe follows closely, emphasizing data-driven hospital management and patient-centric innovations. The Middle East and Latin America are emerging as promising markets as healthcare modernization and smart hospital initiatives take center stage.

Major market players included in this report are:

**Stanley Healthcare**

Zebra Technologies Corporation

Centrak Inc.

Sonitor Technologies, Inc.

Aruba Networks (Hewlett Packard Enterprise Company)

Airista Flow, Inc.

TeleTracking Technologies, Inc.

Impinj, Inc.

Versus Technology, Inc.

Alien Technology, LLC

Identec Group AG

Ubisense Limited

Savi Technology, Inc.

Litum Technologies

Elpas Solutions Ltd.

Global RTLS Market for Healthcare Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive

Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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