

# **Global Home Infusion Therapy Market: Analysis By Product (Infusion Pumps, Intravenous Sets, IV Cannulas, and Needleless Connectors), By Application (Anti-infective, Endocrinology, Enteral Nutrition, Specialty Pharmaceuticals, Hydration Therapy, Chemotherapy, and Others), By Route of Administration (Intramuscular, Subcutaneously, and Epidural), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028**

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## **Abstracts**

The global home infusion therapy market in 2022 was valued at US\$23.55 billion. The market is expected to be worth US\$38.71 billion in 2028. Home infusion therapy refers to the intravenous or subcutaneous administration of medication (drugs or biologicals) to an individual at home. It has proven to be a safe, effective, and cost-efficient alternative to hospital care. It is commonly used for gastrointestinal disorders, diabetes, cancer-related pain, cystic fibrosis, and chronic dryness, minimizing the need for frequent hospital visits and boosting drug adherence.

As chronic diseases become increasingly widespread worldwide, necessitating long-term treatment, home infusion therapy emerges as a more effective and efficient option for administration. Therefore, surging prevalence of various chronic diseases is one of the main factors that would drive the demand for home infusion therapies in the forthcoming years. The market is expected to grow at a CAGR of approx. 8.64% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

**By Product:** The report identifies four segments on the basis of product: Infusion Pumps, Intravenous Sets, IV Cannulas, and Needleless Connectors. Among the products, Infusion Pumps segment dominated the market. Infusion pumps are commonly used for nutrient and drug delivery. The increasing preference for home-based care, driven by patient comfort and cost-effectiveness, elevates the demand for infusion pumps. In addition, technological advancements, such as portable and user-friendly designs, enhance their appeal. With a rising aging population and a growing range of treatable conditions through home infusion, infusion pumps remain indispensable, has been positively contributing to the positive growth of the segment.

**By Application:** The report provides the bifurcation of home infusion therapy market into seven segments on the basis of application: Anti-infective, Endocrinology, Enteral Nutrition, Specialty Pharmaceuticals, Hydration Therapy, Chemotherapy, and Others. Due to the growing incidence of infectious diseases in various nations and increased R&D activities, anti-infective segment lead the market in 2022. However, endocrinology is projected to be the fastest-growing segment owing to the growing number of conditions associated with the endocrine system. Thyroid is one of the most common disorders prevalent in the U.S., sometimes resulting in death. The American Association of Clinical Endocrinologists (AACE) is increasing its focus on implementing training programs to create awareness about the benefits of using insulin pumps. Insulin pumps are highly convenient for proper insulin delivery and help maintain the blood glucose level. Hence, growing cases of thyroid along with metabolic disorders are expected to drive the segment growth.

**By Route of Administration:** The report identifies three segments on the basis of route of administration: Intramuscular, Subcutaneously, and Epidural. The intramuscular segment held the largest market share in 2022, driven by growth in prevalence of chronic diseases that require medications through muscles, rise in demand for biosimilars and vaccination, and increased demand for intramuscular drug delivery due to its advantages. Furthermore, the increasing prevalence of cancer and the need for targeted drug delivery systems are also expected to drive the market.

**By Region:** In the report, the global home infusion therapy market is divided into five regions: North America, Europe, Asia Pacific, South & Central America, and Middle East and Africa. North America accounted for the largest share in the global home infusion therapy market in 2022. Because of the increased demand for long-term therapy for individuals with particular illnesses, increasing burden of chronic diseases such as cardiovascular disorders, neurological disorders, among other disorders, strong

presence of key players in the region, the region's increased R&D and the increasing usage of new technology in infusion pumps, North America and Europe are projected to be major markets over the forecast period.

The Asia Pacific region is expected to be the fastest-growing market, because of increasing healthcare expenditure, growing consumer awareness regarding the therapy for the treatment of various chronic diseases over in-hospital procedures, increasing growing prevalence of diabetes and the expanding home healthcare sector in the region.

#### Market Dynamics:

**Growth Drivers:** The market has been growing over the past few years, due to factors such as surging prevalence of chronic diseases, lifestyle changes along with rapid urbanization, increasing diabetic population and rising inclination of patients towards home based care. The prevalence of heart disease, diabetes, arthritis, Alzheimer's disease and other dementias, and cancer, major drivers of illness, disability, deaths and healthcare costs, all increase with aging. The poor compliance with treatment, poor tolerance of therapy and the presence of underlying or associated diseases makes the elder age group more vulnerable to chronic diseases. Resultantly, the aging global population contributes to increased chronic diseases, especially in older adults needing long-term care, fueling the demand for home infusion therapies. Thus, the need for home infusion therapies is growing as the global population ages, which in turn, has augmented the growth of the global home infusion therapy market.

**Challenges:** However, some challenges are also impeding the growth of the market such as high risk of failure associated with home infusion medical devices and limited reimbursement for home care.

**Trends:** The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as emerging potential in chemotherapy, rising cases of Parkinson's disease, growing occurrence of hospital-acquired infections (HAIs) and technological advancements. The immune-suppressed patients receiving infusion therapy at hospitals are at a greater risk, making home care setting the best alternative to receiving safe treatment, augmenting the preference towards home infusion therapy among patients, which is anticipated to be a vital factor driving the overall market's growth.

#### Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has had a positive impact on the growth of the home infusion therapy market. Since the outbreak of COVID-19, the use of in-home care and home infusions has increased to free up space in hospitals and ensure patient safety. The continuous concerns over the spread of COVID-19 infection have considerably accelerated patient interest in home infusion therapy. Moreover, to fight against the disease, the immune system of the patients needed to be boosted. Hence, the administration of required nutrition was provided to the patients through home infusion therapies. After the pandemic, home infusions became the new standard for patients thus, supporting the market development over the forecasted period.

#### Competitive Landscape:

The global home infusion therapy market is highly competitive and consists of global as well as several regional players. The key players of the global home infusion therapy market are:

B. Braun (B. Braun Melsungen AG)  
Becton, Dickinson and Company  
Baxter International, Inc.  
ICU Medical, Inc.  
Fresenius Medical Care AG & Co. KGaA  
Terumo Corporation  
Nipro Corporation  
Pfizer Inc.  
Novartis AG  
CSL Limited  
CareCentrix, Inc.  
Option Care Health Inc.  
The PromptCare Companies, Inc.

Collaborations, new product development, investments connected to growing capabilities, mergers and acquisitions, partnerships and agreements, and investments in research and development are just a few of the major strategies used by the players.

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