

North America Home Healthcare Market Analysis, by Product (Wound Care, Mattress Overlays, Seating Cushions, Heel Protectors, Annual Unit Sales by Company), by Services (Home Care, Unskilled Home Care, Durable Medical Equipment) And Segment Forecasts To 2022

<https://marketpublishers.com/r/NE701593618EN.html>

Date: March 2016

Pages: 93

Price: US\$ 4,500.00 (Single User License)

ID: NE701593618EN

Abstracts

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North America home healthcare market was valued at USD 756.8 million in 2014. Rising aging human population, high disposable income for healthcare expenditure, and increasing rate of target diseases are some of the key factors driving growth. Predominance of chronic diseases, and increasing diagnosis expenditure is anticipated to boost growth.

Personalized medical assistance is a cost effective measure to control treatment expenditure and acts as major driver for the industry. According to the U.S. Bureau of Labor Statistics (USBLS), personal care and healthcare assistance in a home-setting environment is anticipated to reach a value of USD 13 million by 2020, an increase of 70% from 2010 to 2020.

The home healthcare industry is anticipated to be majorly driven by the huge aging population volume which is highly prone to various diseases such as venous stasis ulcers, diabetic ulcers, and pressure ulcers. According to WHO, the global volume of population falls under the age group of 60 years and above has reached 841 million in 2014 and is expected to reach 2 billion by 2050. Therefore, rising global aging-population along with the statistics that approximately 70% of home healthcare patients

belong to 65 years and above age group, is anticipated to fuel demand in the near future.

Wound care accounted for 65% of the global market revenue in 2014. Substantial demand for wound closures, wound care dressings, and wound cleanser has resulted in the dominance of the segment over the past few years and this trend is expected to continue over the forecast period. Wound infection is a key safety concern for medical professionals and patients, thus the market is anticipated to fuel the demand as it compelled to reduce the infection rates. Wound care products improve the overall health of patients affected from various disorders such as, diabetic ulcers, pressure ulcers and venous stasis ulcers, therefore creating strong need for these products in the industry.

Rising number of geriatric patients with growing awareness about personal safety and hygiene is further expected to intensify home healthcare service demand in the North America. Mattress overlays and wound care together are projected to capture more than 85% of the overall market share by 2022.

Home care service dominated the global industry accounting for 32.0% in 2014 owing to rising number of geriatric patients. This service provides several benefits such as personalized care, familiar surroundings, and low treatment cost. On the other hand, durable medical equipment (DME) which includes mobility support is anticipated to witness attractive growth in the coming years owing to their increasing utilization for long term medical care coupled with provision of favorable repayment facility on these devices.

The U.S. lead the home healthcare market in North America with more than 80% share. Large base of aging population, growing healthcare infrastructure and high purchasing power are some of the key factors driving growth. Moreover, favorable government initiatives aimed at controlling treatment expenditure by promoting home care services is anticipated to fuel growth. According to the PRB (Population Reference Bureau), at present, approximately 50 million citizens of North America are over 65 years and the number is projected to reach to 89 million by 2050.

Major market participants in this industry include Medline Industries, Invacare, Stryker, Johnson & Johnson, Hill-Roam Holdings, Smith & Nephew, Span America, Kinetic Concepts, ConvaTec, and Molyndy HealthCare. The market is characterized by strategic alliance, innovative product launch, and mergers & acquisitions.

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