

U.S. Healthcare Real Estate Market Size, Share & Trends Analysis Report By Property (Hospitals, Medical Office Buildings, Senior Living & Retirement Communities), By Model (Sales, Rental, Lease) And Segment Forecasts, 2025 - 2030

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Abstracts

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U.S. Healthcare Real Estate Market Growth & Trends

The U.S. healthcare real estate market size is expected to reach USD 1,876.77 billion by 2030, according to a new report by Grand View Research, Inc. The market is projected to grow at a CAGR of 6.2% from 2025 to 2030. The market is experiencing robust growth, driven by several key factors reshaping the landscape and presenting significant opportunities for investors and developers, such as the aging population, healthcare spending, the expansion of outpatient facilities, and new technologies. The demographic shift towards an older population drives healthcare real estate expansion. By 2030, all baby boomers will be over 65, increasing the senior population to 20% of the U.S. total. This age group is expected to account for 37% of national healthcare spending, with per capita expenditures significantly higher than younger cohorts. The growing need for age-appropriate healthcare services is fueling demand for facilities such as outpatient centers, specialty clinics, and senior living communities. Medical Outpatient Buildings (MOBs) have seen increased occupancy rates, reaching 92.8% in Q4 2024. This shift is driven by patient preferences for convenience and cost-effective care.

Alongside this demographic shift, the current healthcare capacity highlights growing pressure on the system. According to the American Hospital Association, as of 2025,

the U.S. has 6,093 hospitals, of which 5,112 are classified as community hospitals. A population of around 331 million translates to just 1.84 hospitals per 100,000 people. This relatively low ratio underscores the need for new healthcare facilities, creating strong opportunities for real estate development in the healthcare sector.

Moreover, the rising incidence of acute diseases is compounding the demand. For instance, conditions like acute kidney injury (AKI) are becoming more common, driven in part by the aging population and the increasing prevalence of chronic illnesses such as diabetes and hypertension. According to the 2020 Annual Data Report, these health challenges contribute to rising hospitalization rates.

In 2025, the U.S. is projected to experience about 36.2 million hospitalizations, which is expected to climb to 40.2 million by 2035. This trend reflects the growing demand for inpatient care and highlights the urgency of expanding hospital capacity. As hospitalizations increase and physician shortages persist, the pressure to invest in new medical facilities becomes even more critical.

U.S. Healthcare Real Estate Market Report Highlights

The senior living and retirement community sector is on a strong growth trajectory and is projected to showcase significant growth from 2024 to 2030. This surge is primarily driven by the aging baby boomer population, which is fueling demand for post-retirement living options that offer comfort and access to specialized healthcare services. Real estate developers and institutional investors are increasingly drawn to this sector, recognizing it as a stable, long-term asset class.

Medical Outpatient Buildings (MOBs) are capitalizing on changing healthcare preferences, particularly the shift toward more accessible outpatient care. In 2024, MOBs saw a decline in vacancy rates and an increase in asking rents, even in the face of new supply. This reflects robust demand as patients and providers seek care facilities closer to residential areas.

The lease model dominated the healthcare real estate sector in 2024, holding a market share of 65.10%. Its popularity stems from the financial flexibility it offers healthcare providers, enabling them to invest more in patient care rather than property ownership. Leasing also facilitates scalability, allowing facilities to adjust space usage based on shifting patient volumes and service models. For investors, long-term lease agreements provide stable income and lower risk, making this model especially attractive to REITs and institutional buyers.

The market is being shaped by industry giants such as Welltower Inc. (\$82.34B market cap), Ventas Inc. (\$24.94B), and Healthpeak Properties Inc. (\$14.44B). These players dominate due to their scale, diversification, and strategic partnerships. Welltower, in particular, maintains the largest and most varied portfolio among healthcare REITs, spanning senior housing, outpatient facilities, and health systems. Their large-scale operations allow them to mitigate risk, secure long-term operator relationships, and maintain consistent performance, even in fluctuating market conditions. Their depth of experience and sector focus give them a significant edge in a growing and increasingly competitive market.

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