

Home Medical Equipment Market Report by Equipment Type (Therapeutic Equipment, Patient Monitoring Equipment, Mobility Assist and Patient Support Equipment), Distribution Channel (Retail Medical Stores, Online Retailers, Hospital Pharmacies), and Region 2024-2032

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Abstracts

The global home medical equipment market size reached US\$ 40.0 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 67.0 Billion by 2032, exhibiting a growth rate (CAGR) of 5.8% during 2024-2032. The recent onset of the coronavirus disease (COVID-19) pandemic, the emerging technological advancements in medical technology, and the increasing incidences of chronic diseases such as diabetes, cardiovascular conditions, and respiratory ailments are some of the major factors propelling the market.

Home medical equipment refers to several devices and tools designed to aid individuals in managing their health conditions from the comfort of their own homes. These items comprise numerous medical supplies, devices, and helps cater to several needs. Some commonly available mobility aids include wheelchairs, walkers, and crutches, and monitoring equipment such as blood pressure monitors, glucose meters, and pulse oximeters. Home medical equipment plays are essential in enhancing the quality of life for individuals with chronic illnesses, disabilities, or recovery needs. Additionally, it empowers patients to actively participate in their care and reduces the need for frequent hospital visits.

The market is primarily driven by the growing geriatric population, susceptible to numerous medical conditions. In addition, individuals are seeking ways to manage their

health conditions and maintain their independence from the comfort of their homes, resulting in the escalating demand for various home medical devices such as mobility aids, monitoring equipment, and therapeutic devices, thus influencing market growth. Moreover, several technological advancements and the integration of smart technology and the Internet of Things (IoT) capabilities into devices allow for remote monitoring, real-time data collection, and improved patient-doctor communication which enhances the quality of care and provides healthcare professionals with valuable insights into patient health representing another major growth-inducing factor. Besides this, the ongoing shift toward cost-effective healthcare solutions and the preference for home-based care over hospital stays are contributing to the market growth. Furthermore, it reduces healthcare costs, and offers convenience and personalized care, thus creating a positive market outlook.

Home Medical Equipment Market Trends/Drivers:

The recent onset of the coronavirus disease (COVID-19) pandemic

The emergence of the COVID-19 pandemic significantly impacted the home medical equipment market. As the virus spread globally, there was an increasing awareness regarding the need for personal health and safety, leading to the escalating demand for medical equipment within homes, thus influencing the market growth. Consumers prioritize self-care and monitoring which is driving the sales of medical equipment such as thermometers, pulse oximeters, blood pressure monitors, and respiratory devices. The pandemic-induced lockdowns and restrictions also encourage healthcare providers to explore telehealth options, creating a demand for remote patient monitoring tools. Moreover, manufacturers are increasing the production of essential medical devices and ensuring a steady supply to meet the escalating demand of individuals, thus representing another major growth-inducing factor. Furthermore, the pandemic prompted innovation in the sector, with companies exploring advancements in technology to develop smarter, more connected medical devices to enhance the patient experience and provide accurate data to healthcare professionals remotely.

The emerging technological advancements in medical technology

The proliferation of wearable health devices, such as smartwatches and fitness trackers is influencing the market growth. These devices monitor vital signs, track physical activity, and provide real-time health insights. Additionally, telemedicine solutions are gaining traction, allowing remote consultations and medical guidance through video calls, ensuring timely access to healthcare professionals, thus contributing to the market growth. Moreover, the development of portable medical equipment, including portable

oxygen concentrators and compact blood glucose monitors is encouraging individuals with chronic conditions to manage their health effectively without constant visits to healthcare facilities representing another major growth-inducing factor. Besides this, the integration of Internet of Things (IoT) technology allows for seamless connectivity between medical devices and healthcare providers, facilitating remote monitoring and data sharing. Furthermore, they enhance patient outcomes, promote preventive healthcare practices, and alleviate the strain on traditional healthcare systems.

The increasing incidences of chronic diseases

Chronic diseases, characterized by long-term health issues requiring continuous care, led to the escalating demand for home medical equipment that facilitates effective management and monitoring. As chronic diseases such as diabetes, cardiovascular conditions, and respiratory ailments are spreading, individuals seek ways to enhance their quality of life and reduce hospitalization instances. Also, patients and caregivers are seeking reliable solutions that allow for accurate diagnostics, treatment administration, and ongoing health surveillance from the comfort of their homes, thus propelling the market growth. Moreover, the rising incidences of chronic ailments encouraged governments and healthcare systems to emphasize preventive care and patient empowerment, further propelling the market growth.

Home Medical Equipment Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global home medical equipment market report, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on equipment type and distribution channel.

Breakup by Equipment Type:

- Therapeutic Equipment
 - Respiratory Therapy Equipment
 - Dialysis Equipment
 - Intravenous Equipment
 - Others
- Patient Monitoring Equipment
 - Conventional Monitors
 - Telemedicine Patient Monitoring Equipment
- Mobility Assist and Patient Support Equipment
 - Mobility Assist Equipment

Medical Furniture
Bathroom Safety Equipment

Therapeutic equipment represents the most popular product type

The report has provided a detailed breakup and analysis of the market based on the equipment type. This includes therapeutic equipment (respiratory therapy equipment, dialysis equipment, intravenous equipment, and others), patient monitoring equipment (conventional monitors, and telemedicine patient monitoring equipment), and mobility assist and patient support equipment (mobility assist equipment, medical furniture, and bathroom safety equipment). According to the report, therapeutic equipment accounted for the largest market share.

The therapeutic equipment market is driven by its capacity to offer proactive and targeted care to patients dealing with chronic illnesses, post-operative recovery, and rehabilitation needs. It includes devices such as respiratory therapy equipment, mobility aids, pain management devices, and wound care tools. In addition, the growing prevalence of chronic disorders has underscored the importance of these therapeutic solutions, as they empower patients to actively engage in their own health management while reducing the burden on healthcare facilities.

Moreover, advancements in technology led to the development of innovative and user-friendly therapeutic equipment, further propelling the market growth. Also, smart and connected devices enable real-time monitoring, data collection, and remote communication with healthcare professionals, enhancing the effectiveness of therapeutic interventions, which is propelling the market growth.

Along with this, the changing consumer preference for home-based care and the shift toward preventive healthcare strategies are escalating the demand for therapeutic equipment within the home medical equipment market to maintain their well-being and manage health conditions in a convenient and personalized manner.

Breakup by Distribution Channel:

Retail Medical Stores
Online Retailers
Hospital Pharmacies

Retail medical stores presently account for the largest market share

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes retail medical stores, online retailers, and hospital pharmacies. According to the report, retail medical stores accounted for the largest market share.

Retail medical stores offer a physical presence in local communities, enabling consumers to conveniently procure numerous home medical equipment. These stores are strategically located for easy accessibility to individuals seeking products for themselves or their loved ones which fosters a sense of trust and familiarity among consumers, driving them to rely on these stores for their healthcare needs.

Along with this, retail medical stores often train staff to provide personalized assistance and guidance to customers which adds a layer of reassurance, particularly for individuals who may be unfamiliar with the numerous home medical equipment available, thus propelling the market growth. The ability to interact with knowledgeable professionals aids in making informed purchasing decisions and selecting the most suitable products.

Furthermore, the tangible aspect of retail stores allows customers to physically examine and assess products before making a purchase. This tactile experience is particularly valuable when choosing items that directly impact health and well-being. The immediate availability of products also eliminates the wait associated with online orders, contributing to enhanced customer satisfaction.

Breakup by Region:

- North America
 - United States
 - Canada
- Europe
 - Germany
 - France
 - United Kingdom
 - Italy
 - Spain
 - Russia
- Others
- Asia Pacific

China
Japan
India
South Korea
Australia
Indonesia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

North America exhibits a clear dominance in the market

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

The North America market is driven by the improving healthcare infrastructure characterized by advanced medical facilities, a skilled workforce, and extensive research and development (R&D) capabilities. In addition, the rapid adoption of cutting-edge home medical equipment solutions catering to the growing geriatric population and the prevalence of chronic disorders are augmenting the market growth.

Moreover, the widespread access to healthcare services, including home medical equipment, and the increasing disposable income levels empower individuals to invest in these devices, ensuring better management of their health conditions while remaining in the comfort of their homes, thus representing another major growth-inducing factor.

Furthermore, technological advancements and the presence of innovative companies in the region. North America's tech-savvy population easily embraces telehealth solutions, wearable devices, and the Internet of Things (IoT)-enabled medical equipment, contributing to the market's expansion. The entrepreneurial spirit and a supportive regulatory framework are facilitating the development and commercialization of novel home medical equipment solutions.

Competitive Landscape:

At present, key players in the market are implementing strategic initiatives to fortify their positions and capitalize on the evolving healthcare landscape. These strategies revolve around innovation, expansion, partnerships, and customer-centric approaches to sustain competitiveness and influence the market's trajectory. They are continuously investing in research and development (R&D) to create advanced and user-friendly home medical equipment. They focus on incorporating technologies such as the Internet of Things (IoT), artificial intelligence (AI), and remote monitoring capabilities into their products, enhancing functionality and ease of use which allow patients to manage their health conditions more effectively and empower healthcare professionals with real-time insights. Moreover, companies are establishing strong customer relationships through effective engagement and education and providing resources, training, and support to ensure patients and caregivers are well-equipped to use their products optimally, fostering brand loyalty and trust.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Abbott Laboratories
Arkray Inc.
B. Braun Melsungen AG
Baxter International Inc.
Caire Inc. (NGK Spark Plug Co. Ltd.)
Inogen Inc.
Invacare Corporation
Koninklijke Philips N.V.
Medline Industries LP
Medtronic plc
OMRON Healthcare Inc. (Omron Corporation)
Resmed Inc.

Recent Developments:

In November 2020, Abbott Laboratories introduced a continuous blood glucose monitoring system FreeStyle Libre for adults and children in India which offers patients a choice to check glucose levels anytime and anywhere, thereby improving glucose control.

In March 2020, Invacare Corporation introduced a new brand of power wheelchairs

including Invacare AVIVA FX Power Wheelchair to help patients with mobility disorders at home.

In January 2023, Inogen Inc., a medical technology company offering innovative respiratory products for use in the homecare setting, announced that they achieved regulatory milestones in the EU and the US to support its portable oxygen concentrator products.

Key Questions Answered in This Report

1. What was the size of the global home medical equipment market in 2023?
2. What is the expected growth rate of the global home medical equipment market during 2024-2032?
3. What are the key factors driving the global home medical equipment market?
4. What has been the impact of COVID-19 on the global home medical equipment market?
5. What is the breakup of the global home medical equipment market based on the equipment type?
6. What is the breakup of the global home medical equipment market based on the distribution channel?
7. What are the key regions in the global home medical equipment market?
8. Who are the key players/companies in the global home medical equipment market?

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