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Global AI-Powered Home Care Radar Sensor Market Growth 2026-2032

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Abstracts

The global AI-Powered Home Care Radar Sensor market size is predicted to grow from US$ 247 million in 2025 to US$ 723 million in 2032; it is expected to grow at a CAGR of 18.6% from 2026 to 2032.

AI-Powered Home Care Radar Sensor refers to a class of finished, independently deployable sensing devices designed for home care, aging-in-place, assisted living and home-based health monitoring, using radar as the primary human-sensing technology and embedded artificial intelligence or advanced signal-processing algorithms to interpret human movement and physiological information. A typical device integrates a radar transceiver, antenna system, processing unit, embedded algorithms, communication interfaces, power components and a finished enclosure, enabling continuous and contactless detection without requiring the user to wear or actively operate a device. Key functions cover fall and presence detection, activity and behavioral analytics, vital-sign and sleep monitoring, and integrated multi-parameter care monitoring. The research scope covers Fall and Presence Detection Sensors, Fall and Activity Analytics Sensors, Vital Sign and Sleep Monitoring Sensors, Multi-Parameter AI Care Monitoring Sensors and other qualifying finished radar care sensors. Major downstream use cases include elderly fall detection and emergency response, activities of daily living and behavioral monitoring, and sleep and bedside health monitoring. The research focuses on finished radar sensor endpoints with independent product value and commercial delivery capability.

Key Findings

Fall and Presence Detection Sensors remain the most broadly commercialized product configuration

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Multi-parameter sensing is shifting the market from event detection toward continuous and proactive care

Privacy-preserving contactless monitoring is a core competitive advantage over cameras and wearable devices

Commercial deployment is expanding across North America Europe China and Japan

Market Trends

The AI-Powered Home Care Radar Sensor market is moving from single-event detection toward continuous, multi-dimensional monitoring. Early commercial products were primarily positioned around automatic fall detection and basic presence sensing, while newer generations increasingly combine activity pattern analysis, bed-exit detection, breathing monitoring, sleep assessment and risk identification within a single sensing endpoint. AI algorithms are also shifting from simple threshold-based alarms toward behavior baselining, anomaly recognition and predictive risk analytics. Vayyar Care combines radar-based fall detection with movement-pattern analysis, Pontosense is extending Silver Shield from fall detection into breathing and wellness insights, Huawei integrates fall, prolonged bed-stay, night-time activity and sleep-related sensing, and Fujitsu’s millimeter-wave monitoring technology uses proprietary AI to identify abnormalities from movement and physiological micro-motion. Another defining trend is the growing emphasis on ambient and privacy-preserving sensing: radar enables operation in darkness and privacy-sensitive spaces without continuous optical imaging, while reducing dependence on pendants, watches, patches or other wearable devices. Product differentiation is therefore increasingly determined by algorithm performance, multi-person and multi-room capability, false-alarm control, interoperability and the ability to convert continuous radar signals into actionable care insights rather than by radar hardware alone.

Market Dynamics

Drivers

Demographic aging, the expansion of aging-in-place models and persistent caregiver labor pressure form the primary structural demand drivers. The U.S. Census Bureau reported that the U.S. population aged 65 and above reached 61.2 million in 2024, while Eurostat reported that people aged 65 and over accounted for 22% of the EU population

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at the beginning of 2025. Japan's Ministry of Health, Labour and Welfare has also identified chronic workforce shortages in nursing care and rising expectations for AgeTech to improve care quality and staff productivity. Against this background, automatic and passive monitoring becomes increasingly attractive because it can maintain continuous observation without requiring older users to remember to wear, charge or activate a device. Privacy requirements provide another important driver: radar-based monitoring can detect falls, movement and selected physiological signals without conventional video capture, improving suitability for bedrooms, bathrooms and other sensitive home environments.

Restraints

The main restraints arise from product economics, installation conditions and the difficulty of maintaining stable detection accuracy across diverse residential environments. Radar propagation and algorithm performance can be influenced by room geometry, furniture, multiple occupants, pets, mounting position and the distinction between normal low-level movement and genuine emergency events. Product specifications illustrate these practical constraints: Huawei specifies defined room coverage and installation conditions for its AI wellness sensor and does not recommend the solution for certain pet-owning households, while Vayyar notes defined coverage ranges and limitations for specific areas such as stairwells. More advanced vital-sign and multi-parameter devices also face higher development, validation and certification requirements than basic fall-detection sensors. For products positioned closer to medical monitoring, regulatory clearance, clinical evidence, cybersecurity and integration with healthcare workflows can materially increase commercialization cost and lengthen sales cycles, as illustrated by FDA-cleared and CE-marked radar monitoring products already on the market.

Opportunities

The strongest opportunity lies in extending the product from reactive emergency detection to proactive home-care intelligence. Once a sensor can continuously recognize movement, body position, breathing, sleep and routine behavior, vendors can develop functions that identify deviations from personal baselines before a major event occurs. This creates room for higher-value Fall and Activity Analytics Sensors and Multi-Parameter AI Care Monitoring Sensors and enables integration into telecare, remote monitoring, home-health and smart-home ecosystems. Recent commercial partnerships illustrate this direction: Pontosense expanded integration of Silver Shield with home-care and care-platform partners during 2025, while Xandar Kardian entered an exclusive UK partnership to introduce ambient radar health monitoring into telecare

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applications. Government-backed smart-aging initiatives also create deployment opportunities. Shenzhen authorities have promoted millimeter-wave radar for sleep, fall and vital-sign monitoring in elder-care applications, indicating that radar-based sensing is beginning to move from technology demonstration toward broader public-service and home/community care deployment.

Challenges

The market still faces substantial challenges in standardization, evidence generation and business-model alignment. Vendors use different radar frequencies, mounting architectures, event definitions, algorithm thresholds and performance evaluation methods, making direct comparison of detection accuracy and false-alarm rates difficult. Algorithms trained in controlled environments must also maintain reliability across different body types, mobility levels, room layouts and behavioral patterns. Interoperability is another issue because sensor data often needs to connect with mobile applications, smart-home platforms, telecare systems, nurse-call infrastructure or healthcare workflows. The commercial value proposition must therefore extend beyond hardware performance to demonstrate measurable reductions in long-lie events, unnecessary interventions or caregiver workload. For medical-oriented applications, cybersecurity, data governance and regulatory compliance further raise the entry barrier, while consumer-oriented products face pressure to balance affordability, ease of installation and sufficient monitoring accuracy.

Industry Chain Analysis

The upstream industry chain consists primarily of radar semiconductor devices, RF front-end components, antennas and antenna-in-package structures, processors and MCUs, connectivity chips and modules, memory, power-management components, PCBs, acoustic or auxiliary sensors, and enclosure and mounting components. These components determine the fundamental sensing range, angular resolution, power consumption, processing capacity and connectivity performance of the finished device. Radar hardware alone, however, represents only part of the value creation. The midstream AI-Powered Home Care Radar Sensor manufacturer must integrate RF hardware, embedded signal processing, AI models, application firmware, mechanical design and communications into a stable finished endpoint and then conduct scenario-specific algorithm training, calibration, safety validation and product certification. As functionality expands from fall detection to respiration, sleep and behavioral analytics, software engineering, dataset quality and algorithm validation account for a growing share of product differentiation and development expenditure.

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Downstream channels connect the finished sensors with home-care users through home healthcare providers, telecare operators, senior-care organizations, smart-home platforms, healthcare technology integrators and specialized distributors. Value creation increasingly depends on how effectively the sensor converts raw radar signals into useful alerts and longitudinal care information and how easily those outputs can be integrated into existing care workflows. Partnerships between sensor manufacturers and telecare or care-platform providers are therefore becoming an important route to scale. For the statistical scope of this market, however, the core market value remains the finished radar sensor device itself; revenues from standalone cloud platforms, monitoring subscriptions, installation, emergency response and other downstream services are treated separately to avoid mixing hardware and service layers.

Segment Insights

Fall and Presence Detection Sensors currently represent the most broadly commercialized configuration among confirmed suppliers because fall detection addresses an immediate and easily understood safety requirement while presence sensing provides the basic spatial information required for many higher-level care algorithms. Products in this segment emphasize automatic detection, privacy, rapid alerting and operation without user interaction. Fall and Activity Analytics Sensors represent the next stage of value creation, moving beyond individual incidents to analyze bed exits, prolonged inactivity, mobility patterns and activities of daily living. This broader behavioral context enables caregivers to distinguish isolated events from changes in functional condition and supports more proactive intervention.

Vital Sign and Sleep Monitoring Sensors form a more technically demanding segment because radar must extract very small physiological movements associated with respiration and heartbeat while maintaining robustness through clothing, bedding and ordinary body motion. Neteera, Xandar Kardian, bitsensing and other confirmed participants demonstrate the commercial viability of this technology route. Multi-Parameter AI Care Monitoring Sensors are emerging as the highest-integration direction, combining safety, behavior and health-related data within a single ambient device. Their higher processing, algorithm and validation requirements generally support greater product value, while their ability to address several care needs through one installation creates an important long-term opportunity for platform-oriented home-care deployments.

Downstream Market Opportunities

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Elderly Fall Detection and Emergency Response remains the clearest near-term demand anchor because it addresses a high-consequence event and provides an easily measurable operational benefit through automatic alerts. Activities of Daily Living and Behavioral Monitoring offers a broader opportunity as providers and families increasingly seek to understand changes in mobility, bed occupancy, bathroom behavior and daily routines rather than only receiving emergency notifications. Sleep and Bedside Health Monitoring expands the addressable market toward continuous home health and wellness management, particularly where contactless respiration, sleep-pattern and resting-state monitoring can reduce dependence on wearable devices. Across these applications, the most attractive commercial opportunity is the transition from isolated alarm devices to continuously operating ambient sensors capable of generating longitudinal insights without materially changing the user's daily behavior.

Regional Insights

North America is one of the most mature commercialization regions, supported by a large and growing elderly population, established home-health and senior-living ecosystems, and a relatively active AgeTech vendor and partnership base. The U.S. Census Bureau reported 61.2 million people aged 65 and above in 2024, and companies such as Pontosense, Xandar Kardian, Neteera, Helpany and Cherish Health have established products, deployments or partnerships oriented toward North American care markets. Europe is another major commercialization cluster, supported by an aged demographic structure—Eurostat reported that 22% of the EU population was aged 65 or over at the beginning of 2025—and strong demand for privacy-conscious telecare and assisted-living technologies. Recent partnerships have expanded radar-based monitoring into the UK and continental European care ecosystems.

China is developing as an important scale-up market, supported by smart-home ecosystems, domestic radar supply capabilities and public-sector smart-aging initiatives. Huawei, Hangzhou Hikvision Digital Technology Co., Ltd., Beijing Tsingray Technology Co., Ltd., Xiamen Milesight IoT Co., Ltd., Lumi United Technology Co., Ltd. and Turing Care represent different routes from smart-home integration to specialist elder-care sensing, while local government programs are already promoting millimeter-wave radar for fall, sleep and vital-sign monitoring. Japan represents a strategically important growth market because of its advanced aging profile and strong demand for technologies that reduce care workload. Fujitsu commercially launched its AI-based Millimeter-Wave Monitoring System in June 2025, while cross-industry initiatives involving Vayyar technology have explored non-contact monitoring for falls, vital signs

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and early health-risk detection in residential environments.

Competitive Landscape Analysis

The competitive landscape combines specialist radar sensing companies, healthcare monitoring technology vendors, smart-home and security equipment manufacturers, and emerging AgeTech companies, resulting in a fragmented market in which competitive advantage is determined more by application capability than by corporate scale. Vayyar Imaging Ltd., Pontosense Inc. and Essence SmartCare Ltd. are strongly positioned around privacy-preserving fall detection and elderly-care monitoring, while Neteera Technologies Ltd. and Xandar Kardian Inc. differentiate through continuous physiological monitoring and healthcare-oriented product validation. Cherish Health, Inc. and Helpany Inc. emphasize integrated independent-living and home-care propositions, while Vitalthings AS, JCF Technology Co., Ltd., bitsensing Inc. and Hanshin Technology Limited contribute specialized regional and functional capabilities. In China, Huawei Device Co., Ltd. leverages the smart-home ecosystem to combine fall, sleep and activity sensing; Hangzhou Hikvision Digital Technology Co., Ltd., Beijing Tsingray Technology Co., Ltd., Xiamen Milesight IoT Co., Ltd., Lumi United Technology Co., Ltd. and Turing Care compete through combinations of radar hardware, AI algorithms, IoT connectivity and local elder-care channels. Fujitsu Limited adds a major Japanese technology group to the competitive field with its 2025 AI millimeter-wave monitoring product. Recent strategic developments reinforce the shift toward commercialization and ecosystem integration: Pontosense expanded care partnerships during 2025, Xandar Kardian entered the UK telecare market through an exclusive partnership in August 2025, Milesight introduced the VS373 Radar Fall Detection Sensor in its 2025 product program, and Vayyar Care achieved the UK DCB0129 clinical safety standard in January 2026. Competition is consequently shifting from standalone sensor specifications toward detection reliability, false-alarm control, AI analytics, clinical or operational validation, integration capability and access to home-care distribution ecosystems.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “AI-Powered Home Care Radar Sensor Industry Forecast” looks at past sales and reviews total world AI-Powered Home Care Radar Sensor sales in 2025, providing a comprehensive analysis by region and market sector of projected AI-Powered Home Care Radar Sensor sales for 2026 through 2032. With AI-Powered Home Care Radar Sensor sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$

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millions of the world AI-Powered Home Care Radar Sensor industry.

This Insight Report provides a comprehensive analysis of the global AI-Powered Home Care Radar Sensor landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AI-Powered Home Care Radar Sensor portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AI-Powered Home Care Radar Sensor market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI-Powered Home Care Radar Sensor and breaks down the forecast by Functional Integration Types, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AI-Powered Home Care Radar Sensor.

This report presents a comprehensive overview, market shares, and growth opportunities of AI-Powered Home Care Radar Sensor market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Functional Integration Types:

Fall and Presence Detection Sensors

Fall and Activity Analytics Sensors

Vital Sign and Sleep Monitoring Sensors

Multi-Parameter AI Care Monitoring Sensors

Others

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Segmentation by Operating Frequency Types:

Sub-10 GHz Radar Sensors (<10 GHz)

10–30 GHz Radar Sensors (10–30 GHz)

Millimeter-Wave Radar Sensors (>30 GHz)

Segmentation by Installation Form Types:

Ceiling-Mounted Radar Sensors

Wall-Mounted Radar Sensors

Desktop and Bedside Radar Sensors

Multi-Position Radar Sensors

Segmentation by Application:

Elderly Fall Detection and Emergency Response

Activities of Daily Living and Behavioral Monitoring

Sleep and Bedside Health Monitoring

Others

This report also splits the market by region:

Americas

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- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel

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Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Vayyar Imaging Ltd.

Pontosense Inc.

Essence SmartCare Ltd.

Neteera Technologies Ltd.

Xandar Kardian Inc.

JCF Technology Co., Ltd.

Huawei Device Co., Ltd.

Beijing Tsingray Technology Co., Ltd.

Helpany Inc.

Lumi United Technology Co., Ltd.

Hangzhou Hikvision Digital Technology Co., Ltd.

Vitalthings AS

Xiamen Milesight IoT Co., Ltd.

bitsensing Inc.

Cherish Health, Inc.

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Fujitsu Limited

Hanshin Technology Limited

Turing Care

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI-Powered Home Care Radar Sensor market?

What factors are driving AI-Powered Home Care Radar Sensor market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AI-Powered Home Care Radar Sensor market opportunities vary by end market size?

How does AI-Powered Home Care Radar Sensor break out by Functional Integration Types, by Application?

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