

Home Healthcare Market Assessment, By Service [Hospice and Palliative Care, Rehabilitation Therapy, Skilled Nursing Care, Unskilled Care, Telehealth and Remote Monitoring], By Product [Therapeutics Home Healthcare Devices, Diagnostics and Monitoring Home Devices, Home Mobility Assists Devices, Medical Supplies, Others], By Indication [Respiratory Diseases, Cancer, Movement Disorders, Wound Care, Diabetes, Hearing Disorders, Pregnancy, Cardiovascular Diseases and Hypertension, Others], By Mode of Treatment [Infusion Therapy, Medication Management, Physical Therapy, Wound Care, Continuous Positive Airway Pressure], By End-User [Geriatric Patients, Post-Surgical Patients, Patients with Chronic Diseases, Palliative Care Patients], By Region, Opportunities and Forecast, 2017-2031F

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Abstracts

Global home healthcare market is projected to witness a CAGR of 8.43% during the forecast period 2024-2031, growing from USD 313.54 billion in 2023 to USD 599.09 billion in 2031.

Various significant factors drive the global home healthcare market, such as

advancements in technology, an aging population, the cost-effectiveness and convenience of services, the increasing prevalence of chronic diseases, supportive government policies and initiatives, a shortage of healthcare professionals, and a patient-centric approach to care. Additionally, ongoing evolution, assimilation of state-of-the-art technology, and progress in medical equipment, telemedicine solutions, remote monitoring platforms, and inventive healthcare tools have fundamentally transformed how medical care is delivered within domestic settings. This technological progression has empowered patients with increased control over their health management while enabling healthcare providers to deliver personalized care efficiently through remote monitoring and administration. With the elderly demographic expanding, there arises a corresponding need for specialized care, chronic illness management, and aid with daily living activities. The expansion of global home healthcare market is also driven by the inherent cost-effectiveness and convenience of in-home care, affording patients individualized attention in familiar environment while easing the burden on traditional healthcare institutions.

Moreover, the escalating prevalence of chronic ailments on a global scale has intensified the necessity for long-term care, rehabilitation, and continual monitoring, making home healthcare an indispensable solution. Supportive governmental policies, focused on enhancing access to home healthcare services and encouraging their adoption, have spurred the growth of global home healthcare market. Concurrently, the scarcity of healthcare professionals has instigated a pivot toward home-based care, extending accessible services to patients grappling with limited healthcare accessibility. Ultimately, a patient-centric approach stresses the customization of healthcare services to meet individual patient requirements, elevating the overall quality of care and significantly contributing to the burgeoning global home healthcare market.

Patient-centric Approach

The upsurge in the request for patient-centered care stands as a significant force propelling the global home healthcare market. This shift in approach highlights the significance of customizing healthcare provisions according to the unique needs and preferences of each patient, moving away from the conventional uniform approach. Patient-centered care prioritizes individuals in their healthcare journey, stressing the importance of tailored treatment plans, improved communication between healthcare providers and patients, and a holistic focus on well-being. This trend is reforming how healthcare services are rendered, particularly within the domain of home-based healthcare. Patients are increasingly seeking services that specifically address their needs, fostering a sense of empowerment and involvement in their healthcare

decisions. The emphasis on individualized care, alongside technological progress facilitating remote monitoring and customized interventions, is steering the growth of home-based healthcare services to satisfy the rising demand for patient-centered approaches.

Technological Advancements

Technological progress is a key driver in advancing the global home healthcare market. Developments like telemedicine, wearables, remote monitoring tools, and intelligent healthcare devices have transformed how healthcare is administered at home. These innovations facilitate distant consultations, continual health tracking, and individualized treatment, enhancing accessibility and convenience for patients. Improved connectivity and advanced medical tools not only empower patients with greater control over their health, but also assist healthcare providers in delivering precise, effective care. Consequently, these advancements fuel the worldwide growth and development of home-based healthcare services.

For example, in August 2023, Cera Care, known as Europe's leading digital-first home healthcare provider created, and introduced AI technology capable of forecasting home accidents, specifically predicting falls with an 83% accuracy rate a week in advance. This health technology enterprise, dedicated to delivering social care throughout the UK, is implementing this AI innovation to significantly enhance social care services and proactively prevent hospital admissions.

Government Initiatives

Governments around the globe are actively implementing diverse approaches to strengthen the global home healthcare market. These strategies involve adjusting policies, providing financial incentives, and establishing regulatory structures with the goal of broadening the reach of home-based healthcare services. Furthermore, backing research, encouraging innovation, and incentivizing healthcare providers to deliver home care services are integral to these endeavors. These governmental measures seek to meet the increasing need for customized care, diminish healthcare expenses, and attend to the requirements of aging populations. Ultimately, they aim to promote the expansion and advancement of the global home healthcare sector.

For example, in June 2023, the government revealed plans to introduce a digital NHS Health Check throughout England, starting from the upcoming spring, aiming to ease the strain on GP practices. According to the Department for Health and Social Care

(DHSC), this initiative aims to conduct 1 million health checks within the initial four years of its implementation.

Rising Demand for Infusion Therapies

The rising need for infusion therapy is a key factor driving the growth of the global home healthcare market. Due to its effectiveness, this treatment method, which administers medications through different methods like intravenous or subcutaneous delivery, is in higher demand for managing chronic ailments, such as autoimmune disorders, infections, and cancer. As patients increasingly favor receiving these treatments in the comfort of their residences, the home healthcare industry experiences a surge in requests for infusion therapy services. This inclination toward personalized and convenient healthcare at home underscores a growing trend, contributing to the upward momentum of global home healthcare market.

For example, in August 2023, Uptiv Health emerged as a novel hybrid infusion care enterprise concentrating on transforming the patient journey. Commencing its inaugural site in Michigan, this startup intends to merge high-quality, in-person infusion therapy with tailored virtual care management services for convenience. Offering a patient-centric app of superior quality, cutting-edge on-site services, and an enhanced experience, the company is dedicated to elevating the overall patient experience.

Home Healthcare for Cancer

The rise in home healthcare services for cancer treatment significantly fuels the growth of the global home healthcare market. This trend stems from acknowledging the practicality and effectiveness of delivering cancer care at home, covering treatments like chemotherapy, symptom control, and supportive care. Patients gain from tailor-made treatment strategies and the comfort of their own environment, while healthcare providers emphasize delivering thorough care, minimizing hospital trips, and improving overall well-being. This transformation mirrors an increasing inclination for patient-focused convenient care, substantially impacting the burgeoning expansion of the home healthcare industry.

For example, in July 2023, Reimagine Care and DispatchHealth revealed a collaboration intended to enhance the well-being of cancer patients by offering extensive care beyond traditional healthcare facilities. This partnership also targets the reduction of healthcare expenses and the mitigation of unexpected hospitalizations and visits to the emergency department.

Future Market Scenario (2024-2031F)

The prospects of the global home healthcare market appear exceedingly promising. This optimism stems from several key factors, including technological advancements facilitating remote monitoring, telemedicine, and innovative healthcare devices. These advancements allow for personalized care delivery, improving patient outcomes and satisfaction. Moreover, the aging population worldwide and the prevalence of chronic diseases drive the demand for home-based care services. Governments' supportive policies and initiatives aimed at expanding access to home healthcare, further propelling market growth. Additionally, the post-pandemic landscape has accelerated the acceptance of telehealth and home-based services, fostering a shift in patient preferences toward convenient and accessible care. As the industry continues to innovate, offering comprehensive and tailored solutions while addressing healthcare workforce shortages, the market is poised for substantial growth and evolution in meeting the evolving needs of patients worldwide.

Key Players Landscape and Outlook

Major entities within the global home healthcare market are actively engaging in mergers and acquisitions. These deliberate actions serve the purpose of strengthening market presence, broadening arrays of services and expanding geographical coverage. Through these initiatives, organizations merge compatible technologies and services, streamline their functions, and leverage synergies to address the increasing requirements within the evolving healthcare terrain. Additionally, mergers and acquisitions stimulate innovation and facilitate resource exchange, empowering these entities to effectively address industry obstacles, while positioning themselves for continuous growth and competitiveness in the dynamic home healthcare industry.

In June 2023, Amedisys, a prominent provider of home health, hospice, and high acuity care, entered a merger with Optum, a diversified health services company. The agreement involves the acquisition of Amedisys's existing common stock through an all-cash transaction at USD 101 per share. The union between Amedisys and Optum brings together two entities committed to delivering comprehensive and compassionate care centered on value to patients and their families. The successful execution of this agreement is contingent upon Amedisys shareholder approvals, regulatory clearances, and adherence to customary closing conditions.

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