

# **Home Infusion Therapy Market Forecasts to 2034 – Global Analysis By Product (Infusion Pumps, Intravenous Sets, IV Cannulas, Needleless Connectors, and Consumables & Accessories), Route of Administration, Therapy, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Home Infusion Therapy Market is accounted for \$28.4 billion in 2026 and is expected to reach \$58.9 billion by 2034, growing at a CAGR of 9.6% during the forecast period. Home Infusion Therapy is a clinical practice that enables patients to receive intravenous or other injectable medications in the comfort of their homes, managed by trained healthcare professionals. It covers a broad range of treatments including antibiotics, chemotherapy, parenteral nutrition, pain management, immunoglobulin therapy, and specialty biologics. Advanced infusion pumps, IV sets, and monitoring technologies ensure safe and accurate drug delivery outside traditional hospital settings. This model reduces inpatient stays, lowers overall healthcare expenditure, improves patient quality of life, and supports value-based care initiatives.

Market Dynamics:

Driver:

Rising prevalence of chronic diseases and aging population

The expanding global burden of chronic illnesses such as cancer, diabetes, autoimmune disorders, and infectious diseases is fundamentally reshaping care delivery

models. An aging demographic increasingly requires long-term medication regimens that demand frequent hospital visits under traditional frameworks. Home infusion therapy resolves this challenge by enabling continuous treatment at home, reducing hospitalizations and readmissions. Payers and health systems are incentivizing its adoption as it substantially cuts inpatient costs while maintaining clinical outcomes. Advances in portable infusion devices, telehealth monitoring, and pharmacist-managed protocols further support safe home-based care.

#### Restraint:

##### Complex reimbursement landscape and insurance coverage gaps

Despite its clinical advantages, the home infusion therapy market faces persistent challenges related to inconsistent reimbursement policies across government and private payers. Coverage criteria for specific therapies and medications vary widely, creating administrative complexity for providers and financial uncertainty for patients. The lack of a unified billing code framework and frequent prior authorization requirements slow therapy initiation and reduce provider margins. Smaller infusion pharmacies and independent operators are particularly vulnerable, as limited negotiating power with payers compounds revenue cycle difficulties.

#### Opportunity:

##### Expansion of specialty biologics and biosimilar adoption

The rapid growth of biologics for conditions such as rheumatoid arthritis, multiple sclerosis, Crohn's disease, and rare genetic disorders has created significant demand for sophisticated home infusion services. As biosimilars enter these therapeutic categories, cost reductions are expected to broaden patient access and increase therapy volumes. Specialty infusion providers are investing in cold-chain logistics, patient education programs, and clinical coordination platforms to capture this expanding market. Strategic alliances between pharmacy benefit managers, biotech companies, and home health agencies are further unlocking growth potential.

#### Threat:

##### Drug shortages and supply chain vulnerabilities

The home infusion therapy sector remains susceptible to pharmaceutical supply chain

disruptions, particularly for high-demand IV medications and critical electrolytes. Drug shortages triggered by manufacturing shutdowns, raw material scarcity, or geopolitical trade disruptions can delay patient therapies and force providers into costly alternative sourcing. Regulatory scrutiny over compounding pharmacies adds another layer of operational risk. Building resilient, diversified supplier networks and maintaining safety stock inventories are essential strategies, but they add cost pressures that smaller providers may struggle to absorb.

#### Covid-19 Impact:

The COVID-19 pandemic accelerated the shift toward home-based care as hospitals prioritized capacity for acute COVID-19 patients, limiting access for non-emergency therapies. Telehealth integration, remote patient monitoring, and expanded insurer flexibilities during the pandemic gave home infusion therapy a structural boost. Post-pandemic, patients and clinicians retained strong preferences for home-based care delivery. However, supply chain disruptions exposed systemic vulnerabilities in drug procurement and IV fluid availability. Overall, the pandemic catalyzed regulatory changes that expanded coverage and accelerated market maturation.

The Infusion Pumps segment is expected to be the largest during the forecast period

The infusion pumps segment commands the largest share of the home infusion therapy market, underpinned by their indispensable role in accurate, programmable drug delivery. Elastomeric and ambulatory pumps are widely preferred for outpatient and home use due to their compact design, ease of operation, and eliminating the need for electrical power sources. Technological advancements including smart pumps with dose-error reduction software and wireless connectivity are enhancing patient safety and clinical oversight from remote locations. Rising demand for oncology, anti-infective, and nutritional therapies directly fuels pump utilization.

The Intravenous (IV) Route segment is expected to have the highest CAGR during the forecast period

The intravenous route of administration is projected to register the highest CAGR over the forecast period, driven by its superior bioavailability, rapid onset of action, and suitability for a diverse range of medications including antibiotics, biologics, and chemotherapy agents. IV therapy remains the gold standard for conditions requiring precise dosing and immediate systemic effect. The growing off-label and on-label use of IV biologics in home settings, supported by improved peripheral and central venous

access devices, is contributing to accelerated adoption of IV-based home infusion protocols.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, North America retains the largest share of the global home infusion therapy market, backed by a mature healthcare infrastructure, well-established reimbursement frameworks under Medicare and Medicaid, and widespread availability of specialty infusion pharmacy networks. The United States accounts for the dominant portion of regional revenues, driven by high chronic disease prevalence, strong patient preference for home-based care, and robust adoption of advanced infusion pump technologies. Regulatory support from the Centers for Medicare and Medicaid Services for home health benefits further reinforces North America's market leadership.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. Asia Pacific is anticipated to register the highest CAGR over the forecast period, propelled by rapid healthcare infrastructure expansion across China, India, Japan, and South Korea. Rising awareness of home-based care models, government initiatives promoting community healthcare, and growing middle-class populations with access to private insurance are collectively driving demand. The expansion of specialty pharmacy networks, increasing biologic prescriptions, and investments in telehealth-enabled home monitoring platforms position Asia Pacific as the fastest-growing regional market through 2034.

Key players in the market

Some of the key players in Global Home Infusion Therapy Market include Baxter International Inc., B. Braun SE, Becton, Dickinson and Company, Fresenius Kabi AG, ICU Medical Inc., Terumo Corporation, Option Care Health Inc., CareCentrix Inc., Moog Inc., JMS Co. Ltd., Nipro Corporation, Eitan Medical Ltd., Caesarea Medical Electronics Ltd., Optum Inc., and Amedisys Inc.

Key Developments:

In March 2026, Baxter International announced an expanded strategic partnership with a leading telehealth provider to integrate real-time infusion monitoring capabilities into

its connected pump platform, enabling clinicians to remotely oversee home-based therapy sessions and receive automated alerts for pump anomalies across multiple patient settings.

In February 2026, Option Care Health completed the acquisition of a regional specialty infusion pharmacy operator across three southeastern US states, expanding its home infusion footprint and adding oncology and immunology therapy capabilities to its portfolio, with plans to integrate the acquired operations into its existing care management infrastructure by mid-2026.

#### Products Covered:

Infusion Pumps

Intravenous Sets

IV Cannulas

Needleless Connectors

Consumables & Accessories

#### Route of Administrations Covered:

Intravenous (IV)

Subcutaneous

Epidural

Intramuscular

#### Therapies Covered:

Anti-Infective Therapy

Endocrinology

Chemotherapy

Hydration Therapy

Enteral Nutrition

Blood Factor Therapy

Parenteral Nutrition

Specialty Pharmaceuticals

Pain Management

Immunoglobulin Therapy

#### End Users Covered:

Home Care Settings

Hospitals

Ambulatory Infusion Centers

Specialty Clinics

Long-Term Care Centers

Other End Users

#### Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

*Home Infusion Therapy Market Forecasts to 2034 – Global Analysis By Product (Infusion Pumps, Intravenous Sets,...*

### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

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