

Healthcare Mobile Robots Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Hospital Robots, Care Robots, Imaging Assistance, Rehabilitation and Mobility, Teleoperation and Telepresence Systems, Surgical Robots, Walking Assisting Robots, Others), By End-use (Hospitals, Ambulatory Surgical Centers, Rehabilitation Centers, Research Institutes, Others), By Region, and By Competition

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Abstracts

Global Healthcare Mobile Robots Market was valued at USD 3.30 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 15.75% through 2028. Mobile robotics pertains to the utilization of independent or partially autonomous devices for the purpose of executing tasks and mobility without direct human oversight. Within the healthcare sector, these robotic systems play a pivotal role in a variety of functions. The expansion of this market can be ascribed to the introduction of highly advanced robotic equipment in healthcare, the global increase in the elderly population, a shortage of skilled healthcare professionals, and the upsurge in healthcare expenditures. Furthermore, mobile robotics bestow a significant advantage to healthcare by elevating the quality of patient care. They excel in managing repetitive, time-consuming, and hazardous responsibilities such as the transportation of medications and supplies, thereby enabling healthcare staff to concentrate on their primary duties, resulting in swifter responses and improved patient outcomes. Additionally, mobile robots enhance efficiency by executing tasks with precision and speed, thereby reducing errors and streamlining processes. As an illustrative example, they can effectively sort and deliver medications, preventing the errors that are

unfortunately common in healthcare facilities.

Key Market Drivers

Technological Advancements

The global healthcare industry is undergoing a remarkable transformation, with technological advancements playing a pivotal role in reshaping the way healthcare services are delivered. In this rapidly evolving landscape, mobile robots have emerged as a revolutionary solution for enhancing patient care and optimizing healthcare operations. Technological advancements are the driving force behind the growth of the global healthcare mobile robots market.

Technological advancements have led to the integration of highly advanced sensors and perception systems in healthcare mobile robots. These sensors enable robots to navigate through complex healthcare environments with unprecedented precision, ensuring they can safely move among patients, staff, and equipment. With the ability to detect and avoid obstacles, these robots reduce the risk of accidents and ensure a high level of safety within healthcare facilities.

Artificial intelligence (AI) and machine learning (ML) are transforming healthcare mobile robots into intelligent, adaptable, and responsive entities. AI-powered robots can analyze data from various sources, such as electronic health records and real-time patient monitoring, to make informed decisions. They can assist healthcare professionals in diagnosing conditions, providing treatment recommendations, and managing patient data more efficiently. ML algorithms enable robots to continuously improve their performance, learning from experience and adapting to new situations.

The integration of telemedicine capabilities into healthcare mobile robots allows them to facilitate remote consultations and monitoring of patients. These robots can transmit vital signs, images, and other patient data to remote healthcare providers, expanding the reach of healthcare services to underserved areas. This technological advancement has become especially crucial during global health crises when virtual care is essential.

Technological advancements in mobile robots have fostered closer collaboration between robots and healthcare professionals. Collaborative robots, or "cobots," are designed to work alongside humans. These robots can assist in surgeries, perform delicate tasks, or even provide physical therapy, enhancing the capabilities of medical teams and ensuring precise, consistent outcomes.

User interfaces for healthcare mobile robots have become more intuitive and user-friendly, making them accessible to a wider range of healthcare personnel. Integration with mobile apps and tablets allows healthcare professionals to control and interact with these robots seamlessly. Furthermore, the integration of natural language processing (NLP) enables robots to understand and respond to voice commands, making them even more user-friendly.

Shortage of Skilled Healthcare Staff

The shortage of skilled healthcare staff is a global challenge that is putting immense pressure on healthcare systems. The demand for healthcare services continues to grow, driven by an aging population and the ongoing health crises we face today. To address this shortage and improve healthcare delivery, innovative solutions are needed. Healthcare mobile robots have emerged as a transformative response to this pressing issue, bolstering the global healthcare mobile robots market.

The shortage of skilled healthcare staff is particularly acute in many regions, leading to overworked nurses and doctors. Healthcare mobile robots are stepping in to assist in various roles, such as medication delivery, patient monitoring, and administrative tasks. These robots are effectively filling the gap in the healthcare workforce, enabling existing staff to focus on critical and specialized medical duties.

Healthcare mobile robots offer round-the-clock availability, eliminating issues related to staff fatigue or shift changes. They can work tirelessly, ensuring that patients receive care and assistance at any time of the day or night. This continuous support is crucial for healthcare facilities that struggle to provide sufficient coverage with their limited human workforce.

Mobile robots are consistent and precise in their tasks. They can administer medications with pinpoint accuracy, monitor patient vital signs without interruption, and ensure that repetitive tasks are carried out without error. This level of precision and reliability enhances patient safety and contributes to better overall healthcare quality.

Robots can be programmed to handle routine, time-consuming tasks, freeing up healthcare professionals from the burden of administrative work or basic patient care. This reduction in workload can alleviate stress among healthcare staff and improve their job satisfaction. It also allows them to focus on more complex and critical medical responsibilities.

Healthcare mobile robots can also be operated remotely, enabling skilled healthcare professionals to manage and monitor patients from a distance. This capability is particularly beneficial in cases where there is a shortage of specialists in rural or underserved areas. It enhances healthcare access and expands the reach of specialized care.

The integration of mobile robots streamlines healthcare operations, optimizing the use of available staff. Robots are efficient and can transport medications, supplies, and even perform cleaning tasks in healthcare facilities. These machines not only enhance efficiency but also contribute to reducing operational costs.

Rising Healthcare Expenditure

The global healthcare landscape is evolving rapidly, with healthcare expenditure continuing to increase. Rising healthcare costs are a global concern, and this upward trajectory is compelling healthcare providers to seek innovative solutions for optimizing their resources and providing cost-effective, high-quality care. In this context, healthcare mobile robots are emerging as a transformative force, driving the growth of the global healthcare mobile robots market.

Healthcare mobile robots are being employed to streamline healthcare operations and reduce costs. These robots are designed to perform a wide range of tasks, from transporting supplies and medications to facilitating the cleaning and maintenance of healthcare facilities. By automating these tasks, mobile robots help healthcare providers optimize their operational efficiency. This, in turn, results in significant cost savings and a more streamlined healthcare system.

One of the most significant components of rising healthcare expenditure is labor costs. Healthcare professionals are essential for delivering patient care, but there is a growing emphasis on finding ways to reduce the workload and the number of staff required for non-specialized tasks. Mobile robots can alleviate this pressure by taking over routine and repetitive responsibilities. This reduction in labor requirements translates to substantial cost savings.

Mobile robots are contributing to better patient care, which can, in turn, lead to cost savings in the long run. They are equipped to provide patients with timely and accurate services, including medication delivery, meal service, and patient monitoring. This leads to better patient outcomes and a reduction in the length of hospital stays, ultimately

saving healthcare facilities money.

Mobile robots are particularly valuable in medication management, where errors can lead to significant costs, both financially and in terms of patient safety. Robots can accurately dispense medications, reducing the chances of errors that can result in costly complications and prolonged hospital stays. This precise medication management helps mitigate healthcare costs.

Infection control is a critical aspect of healthcare. Hospital-acquired infections are not only detrimental to patient health but also costly to treat. Mobile robots equipped with ultraviolet (UV) light or other disinfection technologies can effectively disinfect hospital rooms and equipment, reducing the risk of infections. The prevention of such infections leads to cost savings related to additional treatment and extended hospital stays.

Improved Patient Care

The landscape of healthcare is continually evolving, driven by advances in technology and a growing emphasis on providing better patient care. Amid these changes, mobile robots have emerged as a revolutionary solution, enhancing the quality of care and transforming the healthcare industry. The global healthcare mobile robots market is experiencing substantial growth, largely fueled by the goal of improving patient care.

One of the primary contributors to improved patient care is the precise management of medications. Medication errors can have serious consequences, and mobile robots play a crucial role in mitigating this risk. These robots can accurately dispense and deliver medications to patients at the right time and in the correct dosage. This not only reduces the likelihood of medication errors but also ensures that patients receive their treatments promptly, contributing to better health outcomes.

Mobile robots are designed to provide prompt and efficient care. They can assist with tasks such as delivering meals, transporting medical supplies, and even responding to patient requests. This timeliness in care delivery is particularly critical in emergency situations, where immediate attention can be lifesaving. Improved patient care is reflected in shorter response times, reduced wait times, and overall patient satisfaction.

Patient monitoring is essential, especially for those with chronic conditions or those in critical care. Mobile robots equipped with sensors and cameras can continuously monitor patients' vital signs and provide real-time data to healthcare professionals. This ensures that any changes in a patient's condition are promptly identified, allowing for

timely interventions and a higher standard of patient care.

Healthcare-associated infections (HAIs) are a significant concern in healthcare facilities. Mobile robots equipped with disinfection technologies, such as ultraviolet (UV) light, can effectively and autonomously disinfect hospital rooms and equipment. By reducing the risk of HAIs, mobile robots contribute to better patient care, as patients are less likely to experience complications and extended hospital stays related to infections.

Mobile robots are excellent at reducing the physical strain on healthcare staff, allowing them to provide more attentive and compassionate care. By handling tasks like transporting heavy loads, mobile robots prevent healthcare professionals from being overburdened and fatigued. This not only improves the quality-of-care patients receive but also reduces the risk of human errors caused by exhaustion.

Key Market Challenges

Cost of Implementation

One of the most significant challenges in the adoption of healthcare mobile robots is the cost of implementation. The initial investment in purchasing and integrating mobile robots into a healthcare facility can be substantial. Additionally, there are ongoing costs related to maintenance, upgrades, and staff training. Smaller healthcare providers, especially in underfunded regions, may find it challenging to justify such expenditures.

Integration with Existing Systems

Integrating mobile robots with existing healthcare systems can be complex. Healthcare facilities often have diverse and proprietary systems in place, making it difficult to seamlessly incorporate mobile robots. Ensuring that robots can communicate with electronic health records, patient monitoring systems, and other healthcare technologies is a challenge that requires careful planning and investment in integration solutions.

Safety Concerns

Patient safety is a top priority in healthcare, and any technology used in a medical setting must adhere to rigorous safety standards. Concerns about mobile robot malfunctions, collisions, or human-robot interaction have raised questions about safety in healthcare environments. Striking the right balance between safety and efficiency is a challenge that the industry continues to address.

Key Market Trends

Telemedicine Support

One of the prominent trends in healthcare mobile robots is their growing role in telemedicine. These robots can facilitate remote patient consultations, allowing healthcare providers to interact with patients in various locations. They are equipped with video conferencing capabilities, enabling healthcare professionals to conduct virtual visits and provide remote care. This trend is particularly significant in the context of global health crises and is likely to continue to expand in the future.

Enhanced Navigation and Autonomy

Mobile robots are becoming increasingly adept at navigating complex healthcare environments autonomously. They use advanced sensors, artificial intelligence, and mapping technologies to move safely among patients and staff. Improved navigation capabilities not only enhance the efficiency of healthcare operations but also contribute to patient safety by reducing the risk of collisions and accidents.

Robotics for Rehabilitation

Rehabilitation robotics is on the rise, with mobile robots playing a significant role in helping patients regain mobility and independence. These robots can provide physical therapy, gait training, and assistance with daily activities. As the aging population continues to grow, rehabilitation robotics is expected to become increasingly important in healthcare.

Segmental Insights

Type Insights

Based on the category of Type, the hospital robots category dominated the revenue share in 2022 due to its pivotal role in ensuring hospitals run smoothly. Hospitals rely on a diverse range of tasks, such as medication delivery, equipment transport, and patient aid, all of which are executed efficiently by mobile robots. These robots play a key role in automating routine activities like supply delivery, specimen transport, and hospital logistics, resulting in enhanced operational efficiency. This streamlined workflow benefits both hospital staff and patients, while also addressing concerns about hospital-

acquired infections, as mobile robots handle tasks involving minimal direct human interaction.

Conversely, the care robots sector is poised for the most rapid CAGR over the forecast period. With the global population aging, there is a mounting demand for elder care and assisted living. Care robots offer valuable support for daily activities, medication reminders, and companionship for the elderly, contributing significantly to their well-being and independence. For example, Intuition Robotics, an Israeli company established in 2016, introduced ElliQ, a personalized care robot designed to accompany and support the elderly on their journey towards independent aging, reducing feelings of isolation and loneliness.

Furthermore, many regions are grappling with shortages of healthcare professionals, particularly in the caregiving domain. Care robots can fill this gap by assisting with tasks that don't necessitate direct human intervention, thus easing the burden on human caregivers. This heightened demand for care robots tailored to the needs of seniors stems from the growing necessity to support the elderly population and mitigate the adverse effects of isolation and inactivity. These robots not only provide practical assistance but also contribute to improving the overall quality of life for the elderly by fostering social interaction and maintaining a sense of purpose and engagement.

End-use Insights

Based on End-use, the hospital sector claimed the largest share of revenue in 2022 and is poised to experience the most rapid CAGR in the foreseeable future. Hospitals function within complex and dynamic environments that require the efficient execution of various tasks. Mobile robots are well-suited to navigate these intricacies, handling responsibilities such as patient transport and supply management. They also contribute to enhancing patient care by managing routine and non-clinical tasks, enabling healthcare professionals to concentrate on direct patient interactions and critical medical procedures.

Furthermore, robots streamline hospital operations by autonomously undertaking functions such as material transportation, waste disposal, and sterilization. This leads to a reduction in operational bottlenecks and an overall improvement in efficiency. For example, in August 2020, Zealand University Hospital in Denmark incorporated MiR100, a mobile robot from Mobile Industrial Robots (MiR), in five of its hospital departments. This robot travels more than 10 kilometers weekly, minimizing storage space, enhancing service, and averting shortages.

Additionally, these robots play a crucial role in maintaining a hygienic environment by handling tasks that minimize human contact and the spread of infections. They can disinfect hospital rooms, deliver medications, and safely transport contaminated materials, thereby contributing to infection control.

Regional Insights

In the context of geographical regions, North America established its dominance in the market in 2022 by securing the largest share of revenue. This achievement can be attributed to the presence of favorable government initiatives and a highly developed healthcare infrastructure in the region. Furthermore, the rise in disposable income levels, the increasing adoption of robotic technologies, particularly service robots within healthcare institutions, and ongoing product launches in the market are among the factors expected to bolster the growth of this regional market.

Conversely, the Asia Pacific region is projected to experience the most rapid CAGR throughout the forecast period. The burgeoning number of emerging robotics startup companies plays a pivotal role in propelling the growth of the Asia Pacific regional market. This growth is driven by the emergence of new healthtech startups that are revolutionizing healthcare by introducing innovative medical technologies aimed at optimizing patient care, improving healthcare delivery, and reducing costs. For example, according to a March 2023 article in the Times of India, India has witnessed explosive growth in health tech startups, increasing from 452 in 2016 to nearly 90,000. With over 8,000 health tech startups, valued at approximately USD 2 billion and growing at an impressive 40% rate, their impact on various sectors, including this market, is undeniable. The Union Finance Minister has highlighted India's status as the third-largest global startup ecosystem and second in innovation quality among middle-income nations, supported by initiatives like the Startup India Seed Fund Scheme and a National Data Governance Policy. This conducive environment benefits diverse sectors, including this market, where technological advancements from health tech startups can drive the development of advanced robotic solutions, ultimately enhancing patient care and streamlining healthcare processes.

Key Market Players

Akebia Therapeutics, Inc.

ABB Ltd

Aethon Inc

Omron Corp

Amazon.com Inc

Mobile Industrial Robots ApS

Nordson Corp

Teradyne Inc

ATEAGO Technology Co.,Ltd.

VGo Communications Inc

Report Scope:

In this report, the Global Healthcare Mobile Robots Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Healthcare Mobile Robots Market, By Type:

Hospital Robots

Care Robots

Imaging Assistance

Rehabilitation and Mobility

Teleoperation and Telepresence Systems

Surgical Robots

Walking Assisting Robots

Others

Healthcare Mobile Robots Market, By End-use:

Hospitals

Ambulatory Surgical Centers

Rehabilitation Centers

Research Institutes

Others

Healthcare Mobile Robots Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Healthcare Mobile Robots Market.

Available Customizations:

Global Healthcare Mobile Robots market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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