

# **Home Infusion Therapy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Product Type (Infusion Pumps {Elastomeric, Electromechanical, Gravity, Others}, Intravenous Sets, IV Cannulas, Needleless Connectors), By Application (Anti-Infective, Endocrinology {Diabetes, Others}, Hydration Therapy {Athletes, Others}, Chemotherapy, Enteral Nutrition, Parenteral Nutrition, Specialty Pharmaceuticals, Others), By Region and Competition**

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## **Abstracts**

Home Infusion Therapy Market was valued at USD 34.77 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.64% through 2029. The Home Infusion Therapy Market encompasses services and products that allow patients to receive intravenous treatments in the comfort of their own homes. This market includes medical equipment, medication pumps, infusion supplies, and medications themselves, in addition to the professional healthcare services required to administer these therapies. The demand for this market is driven by the benefits of home-based care, including patient comfort, reduced hospital stays, and cost savings for both healthcare providers and patients.

### **Key Market Drivers**

Increasing Aging Population Drives the Market Growth

The growing aging population has been a significant driver that promotes the growth of the Global Home Infusion Therapy Market. By 2022, there were 771 million people over the age of 65 worldwide, nearly 10% of the world's population. This segment is growing rapidly and is expected to reach 16% in 2050 and eventually this segment is expected to reach 24% by 2100. With age, individuals become more susceptible to developing chronic illnesses such as diabetes, cancer, cardiovascular diseases, and respiratory disorders. These conditions often require long-term treatment with medications, fluids, or nutrition that can be administered through infusion therapy. The rising incidence of chronic diseases among the aging population has led to a higher demand for home infusion therapy. Many aging individuals prefer to obtain healthcare services in the comfort of their own homes rather than in hospitals or other healthcare amenities. Home infusion therapy grants patients the opportunity to receive necessary treatments, including intravenous medications, fluids, or parenteral nutrition, in the familiar and convenient setting of their homes. This preference for home-based care has contributed to the growth of the Global Home Infusion Therapy market. With the advancement in medical technology and infrastructure has made it easy and safe to administer infusion therapy outside of traditional healthcare settings. The development of user-friendly infusion devices, portable infusion pumps, and monitoring systems has made home infusion therapy more accessible and manageable for patients and their caregivers. These advancements have further propelled the growth of the Global Home Infusion Therapy Market.

### Shift Towards Patients-Centric Care Propels the Market Growth

The shift toward patient-centric care plays an important role in driving the growth of the Global Home Infusion Therapy Market. According to the Health Care Management Research Consortium (HARC) at the University of Colorado Denver, the second annual Health System Climate Survey outlines health care leaders' goals and plans for 2022. Its finding is the outcome of a survey of 133 US CEOs representing \$263 billion in healthcare system revenues, 1.2 million employees. Patient-centric care aims to enhance patient outcomes by providing comprehensive, coordinated, and continuous care. Home infusion therapy supports this objective by ensuring that patients receive uninterrupted and timely treatments. By avoiding hospital-acquired infections and reducing the risk of medical errors associated with inpatient care, home infusion therapy can improve patient safety and outcomes. This positive impact on patient health further drives the demand for home infusion therapy. Patient-centric care highlights the effective participation of patients in their healthcare decision-making processes. Home infusion therapy encourages patient engagement and empowerment by enabling patients to effectively participate in their treatment plans. Patients receiving home

infusion therapy have greater control over their healthcare, as they can self-administer medications or receive support from caregivers. This involvement fosters a sense of empowerment and autonomy among patients, leading to improved treatment adherence and overall patient satisfaction this led to the growth of Global Home Infusion Therapy Market.

### Increasing Prevalence of Chronic Disease drive the Market Growth

Increasing prevalence of chronic disease plays an important role in driving the growth of Global Home Infusion Therapy Market. Approximately 422 million people worldwide have diabetes, most of them living in low- and middle-income countries, and 1.5 million people die each year directly from diabetes. Both the number of cases and prevalence of diabetes have increased steadily in recent decades. Diabetes, autoimmune disorders, cancer, and cardiovascular diseases such chronic diseases, often require long-term treatment with medications, fluids, or nutrition. Home infusion therapy provides a viable solution for delivering these treatments to patients outside of traditional healthcare settings. It allows patients to receive the necessary therapies in the comfort of their homes, enabling them to manage their chronic conditions more effectively. Home infusion therapy allows patients to receive treatments in the comfort of their own homes, avoiding the need for hospital visits or stays. This convenience factor is particularly beneficial for patients with chronic diseases who require frequent or long-term infusion treatments. Additionally, home infusion therapy can be more cost-effective compared to hospital-based treatments, as it reduces healthcare facility expenses this anticipates the growth of Global Home Infusion Therapy Market.

### Development of Portable & User-Friendly Infusion Pumps

The development of portable and user-friendly infusion pumps is significantly increasing the demand for home infusion therapy globally. Home infusion therapy allows patients to receive intravenous medications, fluids, or nutrition in the comfort of their own homes, rather than in a hospital or clinical setting. Portable infusion pumps offer patients greater flexibility and independence, enabling them to continue with their daily activities while undergoing treatment. Additionally, user-friendly features such as touch-screen interfaces, wireless connectivity, and automated functions make home infusion therapy more accessible and manageable for patients and caregivers alike. As a result, the demand for home infusion therapy is on the rise, driven by factors such as the growing preference for home-based healthcare, advancements in medical technology, and the desire for improved patient outcomes and quality of life. The development of portable and user-friendly infusion pumps is playing a crucial role in meeting this demand,

enabling more patients to benefit from the convenience and effectiveness of home infusion therapy globally.

## Key Market Challenges

### Regulatory Hurdles

Regulatory hurdles are acting as a significant barrier, decreasing the demand for home infusion therapy globally. While home infusion therapy offers numerous benefits, including increased patient convenience, reduced healthcare costs, and improved quality of life, navigating regulatory frameworks can be complex and challenging for patients, caregivers, and healthcare providers. Regulatory requirements vary from country to country and may include licensure, accreditation, certification, and reimbursement criteria that must be met to provide home infusion therapy services.

Additionally, regulatory agencies may impose stringent safety and quality standards to ensure patient safety and mitigate risks associated with home-based treatments. Compliance with these regulations often requires significant investments in infrastructure, training, documentation, and ongoing monitoring, which can deter healthcare providers from offering home infusion therapy services. Moreover, delays or uncertainties in regulatory approvals and reimbursement processes may hinder patient access to home infusion therapy and limit the availability of these services in certain regions. Consequently, regulatory hurdles are impeding the widespread adoption and demand for home infusion therapy globally, highlighting the need for streamlined regulatory pathways and comprehensive support mechanisms to facilitate access to these valuable healthcare services.

### Reimbursement Constraints

Reimbursement constraints are a significant factor contributing to the decrease in demand for home infusion therapy globally. While home infusion therapy offers numerous benefits, including convenience, reduced healthcare costs, and improved patient outcomes, reimbursement policies and constraints can pose barriers to access. Healthcare systems and insurance providers may have complex reimbursement structures, coverage limitations, and administrative requirements for home infusion therapy services.

These constraints may include limitations on eligible diagnoses, coverage of specific medications or therapies, and restrictions on reimbursement rates or reimbursement for

ancillary services such as nursing visits or equipment rental. Additionally, navigating the reimbursement process can be challenging for patients, caregivers, and healthcare providers, leading to delays or denials of coverage for home infusion therapy. As a result, patients may face financial burdens or opt for alternative treatment options, reducing the demand for home infusion therapy globally. Addressing reimbursement constraints through advocacy, policy reforms, and collaborative efforts among stakeholders is essential to ensure equitable access to home infusion therapy and meet the growing demand for patient-centered healthcare services worldwide.

## Key Market Trends

### Flexibility of Therapy Scheduling

The flexibility of therapy scheduling is playing a pivotal role in increasing the demand for home infusion therapy globally. Unlike traditional hospital-based treatments, home infusion therapy offers patients the freedom to schedule their treatments according to their own preferences and lifestyle, without the constraints of hospital schedules or commuting to medical facilities. This flexibility allows patients to maintain their daily routines, work commitments, and family responsibilities while receiving necessary medical care in the comfort of their own homes.

Additionally, for individuals living in remote or rural areas, home infusion therapy eliminates the need for long-distance travel to access healthcare services, thereby improving access to treatment and reducing the burden of transportation costs and logistical challenges. As healthcare systems worldwide seek to enhance patient-centered care and improve healthcare outcomes, the flexibility of therapy scheduling offered by home infusion therapy is driving a surge in demand for this convenient and patient-friendly treatment option globally.

### Growing Number of Clinical Trials Assessing Home Infusion Therapies

The growing number of clinical trials assessing home infusion therapies is significantly increasing the demand for home infusion therapy globally. Clinical trials play a crucial role in evaluating the safety, efficacy, and feasibility of home-based treatments, including infusion therapies, in diverse patient populations and medical conditions.

As more clinical trials demonstrate the effectiveness and benefits of home infusion therapy compared to traditional hospital-based treatments, there is a corresponding increase in demand from patients and healthcare providers seeking access to these

innovative treatment options. Moreover, clinical trial findings provide valuable evidence supporting the expansion of reimbursement coverage and regulatory approval for home infusion therapies, further driving their adoption and utilization. Additionally, the dissemination of positive trial results through scientific publications and medical conferences raises awareness among patients, caregivers, and healthcare professionals, fostering greater acceptance and demand for home infusion therapy as a viable and effective healthcare delivery model globally. Consequently, the growing number of clinical trials assessing home infusion therapies is fueling a surge in demand for these patient-centered treatments worldwide.

## Segmental Insights

### Product Type Insights

Based on the product type, within the vast and rapidly growing Global Home Infusion Therapy Market, Infusion Pumps stand tall as the undoubted champions. These remarkable devices take center stage due to their pivotal role in ensuring the delivery of precise dosages of medication over consistent time intervals. This capability is of utmost importance for a wide range of treatments that are administered in the comfort of one's home. By facilitating the management of chronic diseases, Infusion Pumps empower patients to take control of their health and well-being outside the confines of a hospital setting. Moreover, the invaluable dosage accuracy provided by these pumps plays a vital role in safeguarding the overall well-being and recovery of patients, elevating their quality of life to new heights. With their unwavering reliability and exceptional functionality, Infusion Pumps have become the bedrock of modern home healthcare, revolutionizing the way patients receive treatment and improving outcomes across the globe.

### Application Insights

Based on the Application segment, within the Global Home Infusion Therapy Market, Anti-Infective therapy is currently dominating. This sector has witnessed significant growth due to the rising prevalence of chronic infections and the increasing adoption of home healthcare services. The convenience and cost-effectiveness of home infusion therapy have been key factors driving this trend, as patients find it more convenient to receive treatment at home rather than in a hospital setting. Additionally, the personalized care and flexible scheduling offered by home infusion therapy contribute to its popularity among patients. As a result, the demand for Anti-Infective therapy within the home infusion therapy market continues to rise, demonstrating its effectiveness in



treating chronic infections and improving patient outcomes.

## Regional Insights

In North America, the Global Home Infusion Therapy Market is experiencing dominance due to a multitude of factors. The region boasts advanced healthcare infrastructure, providing state-of-the-art facilities and resources for home infusion therapy. Additionally, significant healthcare expenditure ensures accessibility and affordability of these services to a wider population. Moreover, the steadily growing aging population in North America contributes to the market's growth. With age, individuals become more susceptible to chronic diseases, necessitating long-term care and treatment. Home infusion therapy offers a convenient and effective solution for managing these conditions, allowing patients to receive necessary medications and therapies in the comfort of their own homes.

Furthermore, the presence of key market players in the region enhances the development and delivery of home infusion therapy services. These industry leaders bring expertise, innovation, and specialization to the market, ensuring high-quality care and continuous advancements in treatment options. Favorable government policies and regulations further accelerate the adoption of home infusion therapy services in North America. Supportive initiatives and incentives encourage healthcare providers and patients to embrace this alternative care approach, driving the growth of the market. As a result of these factors, North America stands at the forefront of the Global Home Infusion Therapy Market, offering a comprehensive and robust ecosystem for the provision of home infusion therapy. The region not only meets the current demand but also paves the way for future advancements and improvements in patient care.

## Key Market Players

CareFusion Corporation

BrioRx/Diplomat (UnitedHealth Optum)

PharMerica Corporation

Fresenius Kabi

ICU Medical, Inc.

B. Braun Melsungen AG

Baxter International Inc.

Caesarea Medical Electronics

Option Care Health

Smiths Medical, Inc.

Terumo Corporation

#### Report Scope:

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

#### Home Infusion Therapy Market, By Product Type:

Infusion Pumps

Intravenous Sets

IV Cannulas

Needleless Connectors

#### Home Infusion Therapy Market, By Application:

Anti-Infective

Endocrinology

Hydration Therapy

Chemotherapy



Enteral Nutrition

Parenteral Nutrition

Specialty Pharmaceuticals

Others

Home Infusion Therapy Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

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 Home Infusion Therapy Market.

Available Customizations:

Global Home Infusion Therapy 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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