

Home Infusion Therapy Market Forecast to 2028 - COVID-19 Impact and Global Analysis By Product (Infusion Pumps, Intravenous Sets, IV Cannulas, and Needleless Connectors), Application (Anti-Infective, Endocrinology, Enteral Nutrition, Hydration Therapy, Chemotherapy, Specialty Pharmaceuticals, and Others), and Route of Administration (Intramuscular, Subcutaneously, and Epidural)

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Abstracts

The home infusion therapy market was valued at US\$ 21,765.95 million in 2022 and is expected to reach US\$ 35,696.05 million by 2028; it is estimated to record a CAGR of 8.6% from 2022 to 2028.

The increasing incidences of chronic disorders coupled with the rising geriatric population, and the reducing duration of hospital stays and the surging cost of care are driving the home infusion therapy market development. However, recalls of infusion pumps and safety concerns associated with home infusion hamper the home infusion therapy market growth.

Reduction in Duration of Hospital Stays and Cost of Care Drives Growth of Home Infusion Therapy Market

Many times, patients need to stay in the hospital to complete their course of intravenous drug administrations before they are shifted to oral medications. However, with an effective home infusion service, these patients can be transitioned to home early. The hospital-at-home model delivers hospital-level care within the home environment to

support improved outcomes and enhance the patient experience. Thus, the possibility to treat several complicated medical conditions with home infusion therapies help reduce the length of hospital stays, consequently reducing the cost of treatment.

According to the National Home Infusion Association (NHIA), 3.2 million patients receive home infusion every year, and 98% of these admitted are being “very satisfied” with their treatment. According to a study by the NHIA in 2019, home infusion and specialty providers in the US served ~3 million patients in 2019, reporting a 300% increase in their sales in the last decade. Home infusion imparts significant cost-savings compared to a traditional hospital infusion setting. Infusion provided at home costs 50% less than infusion provided at hospital facilities. According to the article published by Beckers Hospital in 2020, the average cost of home infusion is US\$ 140–250 per day, whereas the average cost of hospital infusions is US\$ 590 per patient per infusion. According to the Commonwealth Fund, hospital-at-home programs help to cut the cost of care by over 30%, doing remarkably well in countries with single-payer systems, such as Canada, England, and Israel.

Patients requiring intravenous therapies in emergency departments can be shifted to home infusion after clinical assessment. The homecare plan includes robust clinical monitoring at home, which allows the early identification of further clinical problems and the implementation of treatment plans to avoid readmissions. An Option Care study of 124 home parenteral nutrition (HPN) and 126 home enteral nutrition (HEN) patients showed that home infusion prevents hospitalization and improves patient care. Both HPN and HEN therapies can be temporarily administered in hospitals, yet ~40,000 HPN patients and 344,000 HEN patients yearly receive their nutrition therapies at home. Therefore, a significant reduction in the cost of care with a decrease in the length of hospital stays, along with the increasing number of patients availing homecare services, fuel the home infusion therapy market growth.

Recalls of Infusion Pumps and Safety Concerns Associated with Home Infusion Hamper Growth of Home Infusion Therapy Market

Patients and physicians are concerned about the potential risk of harmful events during infusion therapy due to the absence of direct physician presence in the home setting. Additionally, risk management is particularly problematic at homecare as the necessary hospital protection measures for physicians and patients away from hospitals may not be in place or immediately available. In some medical conditions, patients may find treatment in hospital settings more effective in terms of cost and care quality and prefer the same over homecare services.

In the last few years, medical agencies have received many reports of adverse events involving infusion pumps. The main reason for infusion pump product recalls are software-related problems, user interface issues, and mechanical and electrical failures. A few recent product recalls related to the infusion systems are mentioned below.

- In February 2020, the US Food and Drug Administration (FDA) announced a Class 1 recall of 322,005 US-distributed MiniMed 600 Series insulin pumps of Medtronic. These pumps were used to administer insulin in Type 1 diabetes patients. Medtronic received 26,421 complaints regarding these devices, and they caused ~2,175 cases of injuries and 1 case of death.
- In March 2020, Becton, Dickinson, and Company recalled 774,000 units of Alaris System infusion pumps sold in the US, under a Class I recall. The product was recalled due to software and multiple system errors, and use-related errors. ~55 injuries and 1 death were reported to be associated with this product.
- In March 2020, the FDA announced the Class I recall of CME America BodyGuard Microset Infusion Sets. These infusion sets were in use with the BodyGuard Infusion Pump System, which can be used in hospital and home-care environments. The Infusion Sets contained an extended section of tubing, which was longer than the standard lengths, restricting medication flow to the pumping chamber of the infusion pump.
- In December 2020, the FDA announced the Class 1 recall of more than half a million Baxter Sigma infusion pumps due to a defective alarm that caused 3 patient deaths and 51 serious injuries.
- In April 2022, Smiths Medical recalled more than 118,000 Medfusion syringe infusion pumps (model-3500 and 4000) due to software malfunction, causing serious patient harm or death because of under or over-infusion, or delayed delivery of critical medications to patients. It caused about seven serious injuries and one death.

Thus, the safety concerns associated with home infusion procedures and recalls of infusion pumps hinder the growth of the home infusion therapy market.

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Product-Based Insights

Based on product, the home infusion therapy market is segmented into infusion pump, intravenous sets, IV cannulas, and needleless connectors. The market for the infusion pumps segment is subsegmented into insulin pumps, elastomeric pumps, syringe pumps, and others. The infusion pumps segment held the largest market share in 2021 and is anticipated to register the highest CAGR during the forecast period.

Application-Based Insights

Based on application, the home infusion therapy market is segmented into enteral nutrition, anti-infective, endocrinology, hydration therapy, chemotherapy, specialty pharmaceuticals, and others. The anti-infective segment held the largest share of the market in 2021. The endocrinology segment is expected to record the highest CAGR during the forecast period.

Route of Administration-Based Insights

Based on route of administration, the home infusion therapy market is segmented into intramuscular, subcutaneously, and epidural. The intramuscular segment held the largest share of the market in 2021 and is expected to register the highest CAGR during the forecast period.

A few of the major primary and secondary sources referred to while preparing the report on the home infusion therapy market are the World Health Organization (WHO), Centers for Disease Control and Prevention (CDC), National Home Infusion Association (NHIA), International Diabetes Federation (IDF), International Agency for Research on Cancer (IARC), and National Cancer Registry (NCR).

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