

# Middle East & Africa Home Healthcare Market Size and Forecast (2021–2031)

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## Abstracts

The home healthcare market in the Middle East and Africa is on a promising growth trajectory, with projections indicating that its size will expand from approximately US\$ 10,975.93 million in 2024 to around US\$ 18,265.35 million by 2031. This growth represents a compound annual growth rate (CAGR) of 7.5% over the forecast period from 2024 to 2031.

### Executive Summary and Market Analysis

Several key factors are driving the steady growth of the home healthcare market in the Middle East and Africa. Governments in the region, particularly in the United Arab Emirates (UAE) and Saudi Arabia, are implementing initiatives aimed at enhancing healthcare access and quality. These initiatives include promoting home-based care services as a more cost-effective alternative to traditional hospital stays. As healthcare costs continue to rise, both patients and healthcare providers are increasingly seeking more affordable treatment options, making home healthcare an attractive solution for managing chronic illnesses and providing post-hospital care.

The prevalence of chronic conditions such as diabetes, heart disease, and respiratory disorders is also on the rise, leading to an increased demand for ongoing, long-term care at home. This trend has resulted in a growing number of trained home health aides and personal care assistants, ensuring that patients receive professional and personalized care in the comfort of their homes. Collectively, these factors are propelling the growth of the home healthcare market in the region, addressing both financial constraints and evolving patient care requirements.

### Strategic Insights

#### Market Segmentation Analysis

The Middle East and Africa home healthcare market can be segmented based on services, types, and indications.

**By Services:** The market is divided into skilled nursing care, physical therapy, rehabilitation therapy, speech therapy, and other services. In 2024, the skilled nursing care segment is expected to dominate the market share.

**By Type:** The market is categorized into therapeutic, diagnostic, and mobility assist types, with the therapeutic segment anticipated to hold the largest market share in 2024.

**By Indication:** The market is segmented into various health conditions, including cancer, respiratory diseases, mobility disorders, cardiovascular disorders, wound care, diabetes, and others. The respiratory diseases segment is projected to lead the market share in 2024.

## Market Outlook

The integration of advanced technologies is significantly transforming the home healthcare landscape. Innovations such as telehealth platforms, wearable devices, and remote patient monitoring systems enable healthcare providers to track patients' vital signs, ensure adherence to medication, and conduct virtual consultations. These technologies not only enhance access to care but also empower patients to take an active role in managing their health, resulting in improved health outcomes and reduced hospital readmissions.

The COVID-19 pandemic has underscored the importance of remote healthcare delivery, leading to a rapid increase in the adoption of telemedicine and virtual care solutions. In the Middle East and Africa, the pandemic accelerated the telehealth trend, with a report from the WHO Regional Office for Africa indicating a 50% increase in telehealth consultations in the first quarter of 2020 compared to the same period in 2019. Notably, during epidemiological week 13 of 2020, telehealth visits surged by an impressive 155% compared to the previous year. Countries such as South Africa, Saudi Arabia, and Egypt have embraced digital health technologies to ensure continuity of care during lockdowns and movement restrictions.

The incorporation of artificial intelligence (AI) and machine learning is further enhancing the capabilities of home healthcare services. These technologies facilitate predictive analytics and personalized treatment plans, allowing healthcare providers to identify potential health risks and tailor interventions to meet individual patient needs. For instance, the Seha Virtual Hospital (SVH), launched by Saudi Arabia's Ministry of Health in February 2022, utilizes digital technologies, including AI and remote monitoring, to extend specialized healthcare services to patients across the country, including home health services.

## Country Insights

The home healthcare market in the Middle East and Africa includes key countries such as the UAE, Saudi Arabia, South Africa, and others. South Africa is expected to hold the largest market share in 2024. The growth in South Africa's home healthcare market is driven by the increasing incidence of chronic diseases, the development of healthcare infrastructure, and the penetration of hospital solution providers into the market. Despite challenges such as poor infrastructure and funding issues, there are significant opportunities for exporters of medical equipment as the government encourages upgrades and development in hospital infrastructure.

## Company Profiles

Key players in the home healthcare market include Enhabit Home Health & Hospice, Apollo HomeCare, Cura Mexico, Koninklijke Philips NV, LHC Group Inc, BAYADA Home Health Care, Mears Group Plc, Abbott Care, Amedisys Inc, Kindred Healthcare LLC, and CenterWell Home Health, among others. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative solutions to consumers.

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