

Outpatient Central Fulfillment Market Size and Forecast (2020 - 2030), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product Type (Automated Medication Dispensing Systems, Automated Packaging and Labeling Systems, Automated Tabletop Counters, Automated Storage and Retrieval Systems, and Others), End User (Hospital Pharmacies, Retail Pharmacies, and Mail-Order Pharmacies), and Geography (North America, Europe, Asia Pacific, South & Central America, and Middle East & Africa)

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Abstracts

The outpatient central fulfillment market size is projected to surge from US\$ 309.32 million in 2022 to US\$ 725.79 million by 2030; the market is estimated to grow at a CAGR of 11.3% during 2022–2030. The rising automation in pharmacies and risk of medication errors propel the outpatient central fulfillment market growth.

Automating the mechanical procedures of any pharmacy process typically entails tracking and updating customer information in databases (e.g., medical history and drug interaction risk detection), counting small objects (e.g., pills and capsules), and measuring and combining powders and fluids for compilation and other such activities. As a result, automated pharmacies are preferred by many hospitals and pharmacies. The pharmacy automation industry is growing due to increased consumer demand for pharmaceutical products, intensified competition among pharmaceutical companies, technological advancements, and precise robotic equipment availability. The increasing

demand for error-free medicines is expected to drive the outpatient central fulfillment market. However, stringent regulatory control, high capital requirements, and problems associated with automation system operations limit the growth of the outpatient central fulfillment market.

Risk of Medication Errors Drives the Outpatient Central Fulfillment Market

A medication error can be a result of inappropriate and ineffective medication dispensing. Common medication errors that have the potential to harm patients include dispensing a wrong drug, an incorrect quantity of a drug, and a wrong drug strength. Moreover, these errors may be caused due to omitting items unintentionally. Medication errors are alarming and are considered the third leading cause of death worldwide. The World Health Organization (WHO) also stated that a medication error causes 1 death in 1 million population globally. Unsafe practices in medicine have been causing unavoidable risks in the healthcare sector. According to the US Food and Drug Administration (FDA), over 100,000 reports associated with medication errors are received every year. Further, as per the study titled “Medication Errors” published in StatPearls in June 2020, annually around 7,000–9,000 people in the US lose their lives due to medication errors. An article published by the European Alliance for Access to Safe Medicines in September 2022 states that medication errors result in 160,000 deaths annually. The article also revealed that medication errors account for 50% of preventable risks in the healthcare sector, with a yearly cost of ~US\$ 42 billion.

Distractions are the leading cause of medication errors. Distractions occur because healthcare professionals are engaged in multiple tasks throughout the day, including examining the patient, interacting with consultants, speaking to patients' family members, and conversing with insurance professionals. Sometimes a lapse of judgment develops in a hurry to complete their duties, which may lead to a medication error.

Another major cause of medication error is distortion. Poor writing, abbreviations, misunderstood symbols, or improper translation cause distortions. Further, pharmacists and nurses find it difficult to understand the handwritten prescription for medicines, leading to the wrong delivery of medicines to the patients. Thus, the undeniable possibility of medication errors triggers the demand for automation in pharmacy operations, thereby bolstering the growth of the outpatient central fulfillment market.

Market Opportunity

Rising Aging Population and Emerging Markets

The aging population is a key to advancements in the healthcare sector. Thus, the growing aging population is anticipated to serve vital growth opportunity for the pharmacy. According to the United Nations's World Population Prospects 2022 report, the elderly population is projected to increase from 10% of the total population in 2022 to 16% of the total population by 2050. The rapidly growing aging population indicates an exponential rise in demand for elderly care and medicines in the coming years. An upsurge in life expectancy worldwide has also led to the need for more digital and automated systems for adult care. The development of automatic medicine dispensers has served beneficially in developed regions. Advanced features such as an LED display, a motor controller, and an alarm system help people with medication reminders. Automated pharmacy systems would enable them to keep track of their medicine and stocks better. Further, implementing automated pharmacy systems has triggered adult medication adherence. With such features, the adoption of automated pharmacy systems is expected to grow in developing countries such as Japan, India, South Korea, and China in the coming years.

Pharmaceutical management is essential in developing countries owing to rising healthcare costs and pressure to improve access to pharmaceutical services. To ease access to drugs, governments of developing countries are adopting various strategies. For example, the Ministry of Health and Social Services in Namibia has adopted multi-month dispensing to facilitate scale-up of antiretroviral therapy to enhance HIV treatment delivery. This system is now widely implemented in Namibia's health facilities, helping achieve national HIV treatment goals. Thus, emerging markets in developing countries offer lucrative opportunities for the players to expand their business. Most market players focus on emerging markets such as China, India, and the UAE due to the surging prevalence of chronic diseases, rising adoption of the latest medical technologies in hospitals, and increasing awareness about advanced medical technologies.

For instance, in November 2020, Deenova entered into a distribution contract with PharmaTech Medical Equipment, a leading pharmacy automation vendor in the Gulf Cooperation Council (GCC). This has provided Deenova's hospital customers in the Middle East access to fully automated packaging robots, all-in-one stations, and state-of-the-art RFID solutions to further increase patient safety and efficiency. Deenova's solutions simplify all processes related to medication management with expected cost savings ranging from 15% to 25%.

The "Global Outpatient Central Fulfillment Market" is segmented on the basis of

technology, offerings, application, end user, and geography.

Product Type-Based Insights

Based on product type, the outpatient central fulfillment market is segmented into automated medication dispensing systems, automated packaging and labeling systems, automated tabletop counters, automated storage and retrieval systems, and other types. The automated medication dispensing systems segment held the largest market share in 2022. The same segment is expected to register the highest CAGR.

An automated medication dispensing system, or automated drug cabinet, is an electronic device primarily used for drug storage and dispensing in healthcare settings. Secured with authenticated passwords and biometrics for drug inventory control and security, these systems aid in tracking and controlling drug distribution. These systems are now widely used in many hospitals, clinics, and nursing homes. The Pyxis MedStation system offered by BD is one of the most used automated dispensing systems in the world. It supports decentralized medication management, and its barcode scanning ensures accurate medication dispensing.

End User-Based Insights

Based on end user, the outpatient central fulfillment market is segmented into hospital pharmacies, retail pharmacies, and mail-order pharmacies. The hospital pharmacies segment held the largest market share in 2022. It is expected to register the highest CAGR in the outpatient central fulfillment market during 2022–2030.

Many hospitals adopt pharmacy automation systems to ensure accuracy, reproducibility, and patient safety. Some studies have observed up to 10% manual error rates in hospital pharmacies. Many studies have proved that using ADM confers more benefits than liability. In March 2020, Swisslog Healthcare partnered with PipelineRx and Savioke to launch the Meds-to-Beds program, an initiative to provide hospital outpatient pharmacy services at discharge. The program includes automatic robotic delivery of prescribed medication and consulting to expand pharmacy capacities. As hospital pharmacies acknowledge the need to provide a high standard of care to patients, the demand for automation equipment is likely to increase significantly during the forecast period.

US Food and Drug Administration, Centers for Disease Control and Prevention, National Institute for Health and Care Excellence, National Health Services, and

European Medicines Agency are some of the relevant sources referred while preparing the outpatient central fulfillment market research report.

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