

# South & Central America Home Healthcare Market Size and Forecast (2021–2031)

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## Abstracts

The home healthcare market in South and Central America (SCAM) is poised for significant growth, with projections indicating that it will reach approximately US\$ 30,088.76 million by 2031, up from US\$ 18,528.20 million in 2024. This growth trajectory reflects a compound annual growth rate (CAGR) of 7.2% from 2024 to 2031, highlighting the increasing demand for home-based healthcare services in the region.

### Executive Summary and Market Overview

The SCAM home healthcare market is experiencing rapid expansion, with Brazil leading in both market share and growth rate. This surge is primarily driven by the region's aging population, which necessitates healthcare services that enable elderly individuals to receive care in the comfort of their homes. Additionally, the rise in chronic diseases such as diabetes, hypertension, and cardiovascular conditions has intensified the need for ongoing, personalized care that home healthcare services can provide.

There is a notable shift towards cost-effective healthcare solutions across South and Central America. Home healthcare services play a crucial role in alleviating the financial burden on hospitals and healthcare systems by minimizing hospital stays and preventing complications through early intervention and continuous monitoring. Brazil, with its relatively robust healthcare infrastructure and a growing private healthcare sector, is at the forefront of adopting these solutions, positioning itself as a key player in the market. The focus on affordability, convenience, and quality care is driving substantial growth in this sector.

### Strategic Insights

#### Market Segmentation Analysis

The SCAM 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 others. In 2024, the skilled nursing care segment held the largest market share.

**By Type:** The market is categorized into therapeutic, diagnostic, and mobility assist segments, with the therapeutic segment leading in 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 was the largest in 2024.

## Market Outlook

As the global population ages, there is a growing recognition among governments of the importance of providing comprehensive healthcare services to senior citizens, including home care. This awareness has led to various initiatives aimed at improving the quality of life for older adults and promoting healthy aging. Since 2011, targeted healthcare initiatives have been implemented across South and Central America to support the increasing population of adults aged 60 and over.

According to a report published in *The Latin American Journal of Public Health* in April 2024, these initiatives focus on integrated geriatric care, ensuring access to primary, secondary, and tertiary services such as diagnostics, rehabilitation, and chronic disease management. Countries like Brazil, Mexico, Argentina, and Colombia have made significant strides in enhancing their healthcare infrastructure for seniors. The Inter-American Development Bank (IDB) has also been instrumental in supporting the development of integrated care systems in Latin America and the Caribbean, including home care models for older adults. These efforts align with the World Health Organization's (WHO) Integrated Care for Older People (ICOPE) framework, which emphasizes the creation of person-centered, coordinated care systems. For instance, in June 2025, the IDB approved a US\$ 250 million loan for Costa Rica to expand its care services for dependent older adults and others in need, further boosting the demand for home healthcare services.

## Country Insights

The SCAM home healthcare market is primarily composed of Brazil, Argentina, and other countries in the region, with Brazil holding the largest market share in 2024. The growth of the Brazilian home healthcare market is attributed to the increasing senior population and advancements in medical technology over recent decades. The aging population is susceptible to various chronic conditions, including cancer, neurodegenerative disorders, orthopedic issues, and diabetes. According to the World

Heart Federation (WHF), non-communicable diseases (NCDs), including cardiovascular diseases (CVDs), account for nearly 74% of adult deaths in Brazil. The rising prevalence of diabetes has also led to a significant increase in the risk of cardiovascular diseases associated with diabetes.

The private sector in Brazil's home care market serves approximately 346,000 beneficiaries annually, as reported by the NEAD-FIPE census of Home Care 2021/2022. Brazilian universities are responding to this demand by offering specialized training programs for home care professionals, including nurses, doctors, psychologists, and physiotherapists. Market players are actively expanding their operations in Brazil through various strategies, including acquisitions and partnerships. For example, in May 2017, Dal Ben acquired Althea, a post-acute care facility in Sao Paulo, marking its entry into the post-acute market and facilitating over 5,000 home visits per month.

#### Conclusion

The South and Central America home healthcare market is on a robust growth path, driven by demographic changes, increasing chronic health conditions, and a shift towards more affordable and accessible healthcare solutions. With strategic investments and initiatives in place, the region is well-positioned to meet the growing demand for home healthcare services.

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