

South & Central America Nurse Call Systems Market Report (2021–2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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Abstracts

The South and Central America nurse call systems market is projected to grow significantly, reaching an estimated US\$ 226.68 million by 2031, up from US\$ 103.19 million in 2023. This growth represents a compound annual growth rate (CAGR) of 10.3% from 2023 to 2031.

Executive Summary and Market Analysis

The market is divided into key regions: Brazil, Argentina, and the Rest of South and Central America. The anticipated growth in this sector is largely driven by an increasing geriatric population and a rising adoption of nurse call systems across healthcare facilities.

Market Segmentation Analysis

The South and Central America nurse call systems market can be analyzed through several key segments:

1. **Equipment:** The market is categorized into integrated communication systems, button systems, mobile systems, and intercom systems. In 2023, integrated communication systems dominated the market share.
2. **Technology:** The market is divided into wired and wireless systems, with wired systems holding a larger market share in 2023.

3. Application: The applications of nurse call systems include emergency medical alarms, wanderer control, workflow support, and others. The emergency medical alarms segment was the largest in 2023.

4. End User: The end users of nurse call systems include hospitals, nursing homes and assisted living centers, clinics, and others. Hospitals represented the largest segment in 2023.

Market Outlook

Recent developments in the region's healthcare infrastructure are expected to further boost the nurse call systems market. For instance, in August 2023, Brazil's federal government initiated the "Novo PAC" (New Growth Acceleration Program), which involves a substantial investment of R\$1.68 trillion (around US\$340 billion) aimed at enhancing infrastructure and social sectors, including healthcare. Approximately R\$1.3 trillion is earmarked for investment by 2026.

In July 2023, the World Bank approved a US\$50 million loan to Argentina to improve public healthcare services for 6.5 million residents in Buenos Aires, focusing on modernizing healthcare facilities and implementing telemedicine solutions. Additionally, Chile received a US\$200 million loan from the World Bank in December 2023 to enhance universal primary healthcare access, with a goal to establish primary care as the foundation of its health system by 2027. Peru's PROINVERSIÓN is also set to launch six Public-Private Partnership (PPP) projects in the health sector between 2024 and 2025, with an estimated investment of US\$700 million, benefiting over 2 million people. These initiatives indicate a growing healthcare sector in developing countries, which is likely to create substantial opportunities for the adoption of nurse call systems.

Country Insights

The market is primarily composed of Brazil, Argentina, and the Rest of South and Central America, with Brazil holding the largest market share in 2023. According to the Journal of Gerontology, the number of dementia cases in Brazil is projected to rise to 5.5 million by 2050. Although there are currently no treatments to halt the progression of Alzheimer's disease, available medications can help manage symptoms of dementia. This increase in dementia cases is driving the demand for nurse call systems, which

integrate healthcare management and nursing documentation into a single device, offering various connection options for installation in both new and existing buildings.

Technological advancements in medical devices, coupled with increased government funding, are facilitating new product launches in the healthcare sector.

Company Profiles

Key players in the South and Central America nurse call systems market include Ascom Holding AG, Honeywell International Inc, Siemens AG, Ametek Inc, Austco Communication Systems Pty Ltd, Intercall Systems Inc., Schrack Seconet AG, TigerConnect, Securitas AB, and Baxter International Inc, among others. These companies are employing various strategies such as market expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase their market presence.

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