

Prehabilitation Market Size, Share and Growth Outlook 2026: By Service, By Indication, By Delivery Mode, By End User, Companies to 2034

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Abstracts

The global Prehabilitation Market size is forecast to increase from \$1.46 Billion in 2026 to \$2.28 Billion in 2034 at a CAGR of 5.74% between 2026 and 2034.

The Prehabilitation market report provides detailed analysis and outlook of Prehabilitation segments including By Service (Physical Therapy and Exercise Conditioning, Nutritional Optimization and Counseling, Psychological and Cognitive Support, Medical Optimization Programs), By Indication (Orthopedic Surgeries, Oncology Surgeries, Cardiovascular and Thoracic Surgeries, General and Abdominal Surgeries, Bariatric Surgeries), By Delivery Mode (In-Person / Facility-Based Programs, Digital Health / Telerehabilitation Platforms), By End User (Hospitals and Surgical Centers, Specialty Physical Therapy and Rehabilitation Clinics, Homecare Settings) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Prehabilitation Industry Overview

Digital Care Pathways, Risk Stratification, and Multidisciplinary Optimization Are Transforming Prehabilitation Programs

The prehabilitation industry is rapidly evolving as healthcare systems increasingly recognize the clinical and economic benefits of structured preoperative optimization programs. Hospitals, integrated delivery networks, and surgical centers are shifting from reactive perioperative care models toward proactive interventions that improve functional capacity before surgery. Digital health platforms, electronic health record

integration, and multidisciplinary care coordination are enabling healthcare providers to identify modifiable risk factors earlier and implement personalized interventions that improve surgical readiness. This transition is being accelerated by growing evidence demonstrating reductions in postoperative complications, hospital length of stay, and overall healthcare resource utilization.

Digital Prehabilitation Platforms Are Expanding Remote Patient Optimization

The adoption of digital health technologies is enabling healthcare providers to deliver structured prehabilitation programs outside traditional hospital environments. Remote monitoring, automated risk assessment, and personalized intervention pathways are becoming foundational components of modern surgical preparation workflows. This trend is illustrated by the expansion of the Surgical Readiness and Prehabilitation Solution developed by Lumeon across major integrated delivery networks. The platform enables automated screening of elective surgical candidates for modifiable risk factors, including nutritional deficiencies, respiratory limitations, and psychological factors, while orchestrating individualized exercise programs, nutritional support, and smoking cessation interventions. Automated escalation pathways further support surgical teams in identifying patients who fail to achieve predefined preoperative milestones, reinforcing the growing role of digital care orchestration in perioperative medicine.

Electronic Health Record Integration Is Standardizing Preoperative Care

The integration of prehabilitation protocols directly into clinical workflow systems is improving care coordination and enabling more consistent implementation of evidence-based perioperative optimization strategies. Electronic health record platforms increasingly support risk-stratified interventions and longitudinal patient monitoring throughout the surgical pathway. This trend is demonstrated by the expansion of specialized prehabilitation and Enhanced Recovery After Surgery capabilities within the MEDITECH Expanse platform developed by MEDITECH. The integrated framework allows healthcare teams to initiate nutritional optimization, physical rehabilitation, and medical risk reduction protocols immediately following surgical scheduling while monitoring patient adherence and functional progress. These developments highlight the growing convergence of digital health infrastructure and perioperative care management.

Multidisciplinary Care Models Are Improving Surgical Outcomes

Healthcare systems are increasingly centralizing prehabilitation services within

dedicated multidisciplinary programs designed to optimize patient readiness before major surgical procedures. Advanced Practice Nurses, internists, rehabilitation specialists, and nutrition professionals are collaborating within structured preoperative pathways to improve clinical outcomes and reduce healthcare costs. Clinical evidence generated through tertiary care centers and published through major medical research networks demonstrated that centralized multidisciplinary prehabilitation programs reduced postoperative complications from 52.6% under standard care to 25.0% among patients completing structured prehabilitation interventions. These programs also reduced blood transfusion requirements and shortened hospital stays, reinforcing the growing importance of integrated preoperative optimization models within modern surgical care pathways.

Prehabilitation Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Prehabilitation market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Cleveland Clinic, Ivy Rehab Physical Therapy, QuestPrehab, Mayo Clinic, Johns Hopkins Medicine, Stanford Health Care, Kaiser Permanente, Physitrack, Recora, Moving Analytics. The Prehabilitation market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Prehabilitation industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Prehabilitation Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Prehabilitation companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

Detailed SWOT Analysis of global and regional Prehabilitation markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Prehabilitation Market Competitive Benchmarking and Company Analysis

Leading companies in Prehabilitation industry include- Cleveland Clinic, Ivy Rehab Physical Therapy, QuestPrehab, Mayo Clinic, Johns Hopkins Medicine, Stanford Health Care, Kaiser Permanente, Physitrack, Recora, Moving Analytics. The Prehabilitation market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Prehabilitation Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Prehabilitation market remains one of the strongest-performing segments in the country.

The US Prehabilitation Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Prehabilitation market faces successive

waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Prehabilitation industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Prehabilitation markets

Canada's strong Prehabilitation sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Prehabilitation market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Prehabilitation Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Prehabilitation market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Prehabilitation population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Prehabilitation industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Prehabilitation market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Prehabilitation sales through 2034

France Prehabilitation companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Prehabilitation Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Prehabilitation distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Prehabilitation Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Prehabilitation market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Prehabilitation industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare

capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Prehabilitation industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Prehabilitation Market Landscape: Current Size and Long-Term Growth Outlook -
Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Prehabilitation market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Prehabilitation market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Prehabilitation Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC

countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Prehabilitation Market Segmentation

By Service

Physical Therapy and Exercise Conditioning

Nutritional Optimization and Counseling

Psychological and Cognitive Support

Medical Optimization Programs

By Indication

Orthopedic Surgeries

Oncology Surgeries

Cardiovascular and Thoracic Surgeries

General and Abdominal Surgeries

Bariatric Surgeries

By Delivery Mode

In-Person / Facility-Based Programs

Digital Health / Telerehabilitation Platforms

By End User

Hospitals and Surgical Centers

Specialty Physical Therapy and Rehabilitation Clinics

Homecare Settings

Leading Companies in Prehabilitation Industry (2026)

Cleveland Clinic

Ivy Rehab Physical Therapy

QuestPrehab

Mayo Clinic

Johns Hopkins Medicine

Stanford Health Care

Kaiser Permanente

Physitrack

Recora

Moving Analytics

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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 - Psychological and Cognitive Support

Medical Optimization Programs

By Indication

Orthopedic Surgeries

Oncology Surgeries

Cardiovascular and Thoracic Surgeries

General and Abdominal Surgeries

Bariatric Surgeries

By Delivery Mode

In-Person / Facility-Based Programs

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By End User

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