

Private Nursing Services Market Size, Share and Growth Outlook 2026: By Service Type (Home Health Nursing, Hospital Support Services, Elderly Care, Palliative Care), By Medical Condition, By Type, By Specialization, Companies to 2034.

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Abstracts

The global Private Nursing Services Market size is forecast to increase from \$6.1 Billion in 2026 to \$9.63 Billion in 2034 at a CAGR of 5.87% between 2026 and 2034.

The Private Nursing Services market report provides detailed analysis and outlook of Private Nursing Services segments including By Service Type (Home Health Nursing, Hospital Support Services, Elderly Care, Palliative Care), By Medical Condition (Chronic Disease Management, Post-Operative Services, Pediatric Care, Elderly Care), By Type (Medical Care, Non-Medical Care), By Specialization (Geriatric Nursing, Critical Care Nursing, Pediatric Nursing) 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.

Private Nursing Services Industry Overview

Workforce Digitization, Flexible Staffing Models, and AI-Driven Care Delivery Are Transforming the Private Nursing Services Industry

The private nursing services industry is undergoing significant transformation as healthcare providers respond to persistent workforce shortages, rising patient care demands, and evolving healthcare delivery models. Hospitals, outpatient facilities, and specialized care providers are increasingly utilizing flexible staffing solutions, international recruitment programs, and artificial intelligence-enabled workforce

platforms to address long-standing nursing shortages. The industry is witnessing a shift toward technology-enabled workforce management systems that improve clinician utilization, expand access to specialized care, and support more responsive staffing strategies across acute, outpatient, and home-based healthcare environments.

International Recruitment Continues to Address Critical Nursing Workforce Gaps

The global shortage of qualified nursing professionals remains one of the most significant challenges facing healthcare systems worldwide. Healthcare organizations are increasingly relying on international recruitment strategies to maintain staffing levels in high-demand specialties and underserved regions. This trend is demonstrated by WorldWide HealthStaff Solutions' successful placement of more than 300 internationally trained registered nurses in outpatient dialysis facilities across 49 states. The continued use of international workforce pipelines highlights the industry's growing dependence on global talent mobility to address persistent shortages in specialized nursing sectors.

Artificial Intelligence Is Improving Clinical Workflows and Nursing Efficiency

Healthcare organizations are increasingly adopting artificial intelligence technologies to optimize clinical workflows, reduce administrative burdens, and improve operational efficiency for nursing professionals. Strategic partnerships between healthcare providers and technology companies are accelerating the integration of AI-driven monitoring and workforce management solutions. This trend is reflected by the long-term alliance between Philips and WellSpan Health, which focuses on deploying advanced AI-enabled clinical technologies to improve patient monitoring and support nursing workflow optimization. Such initiatives demonstrate the industry's broader movement toward digitally enhanced care delivery environments.

Flexible Workforce Platforms Are Reshaping Nursing Staffing Models

Technology-enabled staffing platforms are becoming increasingly important in addressing labor shortages and supporting workforce flexibility across healthcare settings. Hospitals and healthcare organizations are adopting on-demand staffing models that leverage local clinician networks and digital workforce management tools to improve staffing responsiveness. This trend is exemplified by ShiftMed's partnerships with York Hospital and Shriners Children's, which utilize AI-powered workforce platforms to activate community-based clinician pipelines and expand access to specialized nursing services. Similarly, MedPro Healthcare Staffing's recognition for

workforce placement excellence highlights the growing importance of flexible staffing models in supporting both private and clinical nursing demand across diverse healthcare environments.

Private Nursing Services Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Private Nursing Services 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- BAYADA Home Health Care, Maxim Healthcare Services, Aveanna Healthcare Holdings Inc., Amedisys, Inc., LHC Group, Inc. (Optum), NurseRegistry, Trinity Health At Home, Homage Co. Pte. Ltd., Comfort Keepers (Sodexo), BrightStar Care. The Private Nursing Services 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 Private Nursing Services industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Private Nursing Services Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Private Nursing Services 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 Private Nursing Services 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

Private Nursing Services Market Competitive Benchmarking and Company Analysis

Leading companies in Private Nursing Services industry include- BAYADA Home Health Care, Maxim Healthcare Services, Aveanna Healthcare Holdings Inc., Amedisys, Inc., LHC Group, Inc. (Optum), NurseRegistry, Trinity Health At Home, Homage Co. Pte. Ltd., Comfort Keepers (Sodexo), BrightStar Care. The Private Nursing Services 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 Private Nursing Services 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 Private Nursing Services market remains one of the strongest-performing segments in the country.

The US Private Nursing Services 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 Private Nursing Services 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 Private Nursing Services 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 Private Nursing Services markets

Canada's strong Private Nursing Services 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 Private Nursing Services 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 Private Nursing Services 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 Private Nursing Services 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 Private Nursing Services population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Private Nursing Services 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 Private Nursing Services market outlook.

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

France Private Nursing Services 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 Private Nursing Services 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 Private Nursing Services 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 Private Nursing Services Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

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

Indian Private Nursing Services 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 Private Nursing Services 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 Private Nursing Services 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.

Private Nursing Services Market Segmentation

By Service Type

Home Health Nursing

Hospital Support Services

Elderly Care

Palliative Care

By Medical Condition

Chronic Disease Management

Post-Operative Services

Pediatric Care

Elderly Care

By Type

Medical Care

Non-Medical Care

By Specialization

Geriatric Nursing

Critical Care Nursing

Pediatric Nursing

Leading Companies in Private Nursing Services Industry (2026)

BAYADA Home Health Care

Maxim Healthcare Services

Aveanna Healthcare Holdings Inc.

Amedisys, Inc.

LHC Group, Inc. (Optum)

NurseRegistry

Trinity Health At Home

Homage Co. Pte. Ltd.

Comfort Keepers (Sodexo)

BrightStar Care

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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