Home Healthcare Market Analysis by Product, by Service and Segment Forecast to 2020

Description: Home Healthcare Market Analysis By Product (Therapeutic, Diagnostic Equipment, Mobility Assist, Diabetes Monitor, Intravenous Pumps, Holter Monitors, Heart Rate Meters, Wheel Chairs), By Service (Rehabilitation Services, Unskilled Home Care, Respiratory Therapy, Infusion Therapy, Telemetry) And Segment Forecast to 2020

The global market for home healthcare is expected to reach USD 355.3 billion by 2020, growing at an estimated CAGR of 7.8% from 2014 to 2020. Home healthcare products are generally applied to a broad range of equipment and services designed for exclusive use for home or other non-medical establishments by non-professional caregivers, family members, or the patients themselves. Increasing adoption of telehealth and other emerging healthcare technologies are expected to drive market growth over the forecast period. Home healthcare is rapidly getting adopted as a cost effective alternative to healthcare establishment based therapy and therefore, growing geriatric population base and prevalence of chronic conditions requiring long term care is also expected to have a positive impact on growth. Presence of untapped potential in emerging markets such as India, Brazil and China and increasing health awareness are expected to serve this market as future growth opportunities.

Further key findings from the study suggest:

- Home healthcare services dominated the overall market, accounting for over 85% of global revenue in 2013, due to increasing demand for Infusion therapy services and telemetry.
- Infusion therapy is expected to be the fastest growing services market, at an estimated CAGR of 11.7% from 2014 to 2020. Increasing initiatives undertaken by healthcare service providers to curb costs associated with specialty drugs and by retail pharmacies to render efficient chronic disease management solutions are some of the drivers of this market.
- Home healthcare based diagnostics dominated the product market in terms of share at 41.4% in 2013. Growing prevalence diabetes and cardiovascular diseases and the consequent rise in demand for constant patient monitoring is one of the major factors attributing to its large share.
- North America was the largest regional market in 2013, accounting for over 40% of the revenue. Presence of sophisticated healthcare and reimbursement infrastructure, high patient awareness levels and healthcare expenditure are some of the factors accounting for its large share. In addition, increasing R&D initiatives aimed at developing new products suitable for use in home healthcare environments is expected to boost market demand in this region.
- Asia Pacific home healthcare market is expected to grow at the fastest CAGR of 9.7% from 2014 to 2020 majorly owing to high unmet medical needs coupled with rapidly improving healthcare infrastructure in emerging markets of India and China. Presence of a large geriatric population base in Japan is also expected to drive regional market growth during the forecast period.

For the purpose of this study, the report has segmented the home healthcare market on the basis of product, services and region:

Home Healthcare Product Outlook

- Therapeutic equipment
  - Home respiratory therapy equipment
  - Home insulin delivery devices
  - Home IV pumps
  - Other therapeutic equipment
  - Home dialysis equipment
- Home diagnostic equipment
  - Home diabetes care devices
  - Home blood pressure monitors
  - Home multi-parameter patient monitors
  - Home pregnancy and fertility tests
  - Other self monitoring equipment
  - Apnea and sleep monitors
  - Holter monitors
  - Heart rate meters
- Mobility assist and other equipment
  - Wheelchairs and related devices
  - Home medical furniture
  - Walking assist devices

Home Healthcare Service Outlook
- Rehabilitation service providers
- Unskilled home care
- Respiratory therapy services
- Infusion therapy
- Telemetry

Home Healthcare Regional Outlook
- North America
- Europe
- Asia Pacific
- RoW

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