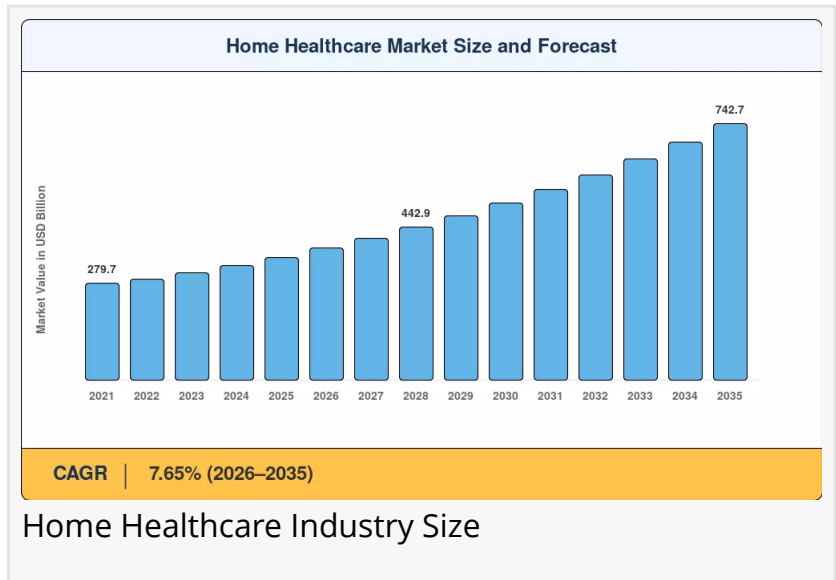


# Home Healthcare Market to reach USD 742.70 Billion by 2035 at 7.65% CAGR

*Home Healthcare Market to Surge from USD 382.20 Billion in 2026 to USD 742.70 Billion by 2035-By Aging Demographics, Hospital-at-Home Program Proliferation*

NY, CA, UNITED STATES, June 26, 2026 /EINPresswire.com/ -- As per Market Research Future, the [global Home Healthcare Market size](#) to reach USD 742.70 Billion by 2035 from USD 382.20 Billion in 2026, at a CAGR of 7.65% during the forecast period 2026--2035. The market base was estimated at USD 355.00 Billion in 2025.



The 7.65% CAGR---anchored by aging demographics across OECD nations and a decisive policy shift toward value-based reimbursement---is driven by three converging forces: the global aging population that continues to widen the addressable patient base for residential care support, hospital-at-home program proliferation that has pulled acute care delivery from inpatient wards into residential settings, and value-based reimbursement expansion that has converted home-based care from a cost center into a reimbursement priority tied to readmission reduction and episode-cost savings.

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Key Market Trends & Growth Drivers

Aging Population and Chronic Disease Burden

The UN projects that adults aged 65 and older will constitute 16% of the global population by 2030, up from 10% in 2022, generating an incremental demand pool of roughly 400 million individuals likely to require some form of residential care support. This demographic wave

directly inflates utilization of the Home Healthcare Market as health systems worldwide prioritize de-institutionalization to contain costs that currently average USD 2,800 per inpatient day in the United States, versus roughly USD 170 per home-visit day.

Extended survival in chronic disease populations---driven by improved cardiovascular and diabetes management extending median life expectancy---creates a larger prevalent population requiring sustained home-based care. Longer survival transforms heart failure and COPD from rapid-mortality diagnoses into chronic diseases with sustained home healthcare utilization.

### Hospital-at-Home Program Proliferation

Legacy inpatient-centric care models, long the default delivery modality, are giving ground to hospital-at-home programs that manage acute episodes in residential settings. The CMS Acute Hospital Care at Home waiver, initially a pandemic-era measure, covered more than 310 participating health systems by mid-2024, collectively managing an estimated 95,000 acute episodes in residential settings annually.

The program's 30-day readmission rate of 6.3% compared favorably with the 14.4% national inpatient benchmark, providing the clinical evidence base that sustains political support for permanent legislative authorization of the Home Healthcare Market delivery model.

### Value-Based Reimbursement Expansion and Cost Containment

CMS's Patient-Driven Groupings Model, fully implemented in 2020, shifted home health agency compensation toward outcome metrics, prompting a 22% increase in home-based therapy utilization between 2021 and 2024. European payers are following suit---Germany's Digital Care Act mandated reimbursement for certified digital health applications starting in 2020, and by 2024, over 50 DiGA-listed apps included home monitoring functionalities.

This economic incentive has driven hospital formulary committees to prioritize preventive home healthcare protocols, shifting procurement budgets toward the Home Healthcare Market at the expense of reactive inpatient intervention spending. Value-based contracts in the United States and European reference pricing for home-care services have shifted institutional procurement toward early intervention.

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Market Segment Insights

BY HEALTHCARE TYPE

Equipment: Dominant segment with ~45.20% revenue share in 2025. Reflecting entrenched patient familiarity with home monitoring and therapeutic devices. Portable blood glucose monitors, blood pressure monitors, pulse oximeters, and CPAP machines anchor institutional procurement globally due to their low cost and decades of clinical evidence supporting home-based chronic disease management. Hospital procurement teams treat them as default first-line agents, and device miniaturization has cut the per-unit cost of continuous glucose monitors and portable ECG patches by an estimated 30% since 2021, widening access in cost-sensitive emerging markets.

Software Platforms: Fastest-growing segment at 13.10% CAGR (2026--2035). Driven by cloud migration and interoperability mandates. CMS's mandate for electronic visit verification accelerated agency migration from on-premise scheduling tools to cloud-native suites, and agencies that adopted unified platforms reported 15--20% administrative cost reductions within the first year of deployment.

#### BY INDICATION

Cardiovascular Disorders and Hypertension: Dominant indication with ~24.70% revenue share in 2025. High prevalence of heart failure and hypertension drives sustained demand for portable cardiac monitors and home blood pressure monitoring devices. Post-cardiac-event monitoring generates recurring visit schedules and continuous device utilization, making cardiovascular home healthcare a near-universal component of the care pathway.

Diabetes: Fastest-growing indication segment at 11.70% CAGR (2026--2035). Reflecting the global surge in continuous glucose monitoring adoption. The global installed base of continuous glucose monitors surpassed 35 million units in 2024, and payer coverage expansions in Europe and Asia are accelerating adoption further. Each percentage point of diabetes prevalence gain translates into measurable prescription volume for home glucose monitoring and insulin delivery systems.

Respiratory Diseases: USD 59.60 Billion in 2025. COPD management and home oxygen therapy anchor this segment, driven by the prevalence of chronic respiratory conditions and the shift from inpatient to home-based pulmonary rehabilitation.

#### BY REGION

North America: Dominant region with ~39.20% revenue share in 2025. Hospital infusion center infrastructure dominates volume, channeling routine home healthcare supply. The United States generates approximately 78.50% of North American Home Healthcare Market revenue, driven by deep Medicare fee-for-service and Medicare Advantage penetration, CMS waiver programs, and broad reimbursement for home-based care regimens---a single policy ecosystem that converted an institution-dominated market into one with a structural home-based care tail.

Europe: Second largest at USD 97.60 Billion in 2025. Europe's Home Healthcare Market reflects divergent national strategies---Germany leads regionally with DiGA digital therapeutics mandate, contributing steady growth, while the UK historically used selective home-care targeting before broadening coverage through NHS virtual ward programs. France contributes ~18.30% of regional share through its HAD (Hospitalisation à Domicile) framework. Italy contributes through PNRR home-care investment. Spain is growing on Ley de Dependencia expansion. Harmonization pressure from the EU Pharmaceutical Strategy is gradually narrowing these differences, lifting baseline demand across the region.

Asia-Pacific: Fastest-growing region at 10.15% CAGR (2026--2035). Asia-Pacific is the engine of the Home Healthcare Market. China holds the largest regional share with significant regional revenue, driven by aging population and 14th Five-Year Plan health targets. India is growing at 11.60% CAGR on the back of Ayushman Bharat expansion and private home-care startup funding. Japan contributes through NHI pricing for next-gen home-care technologies, with its super-aged society generating per-capita home-care expenditure that ranks among the world's highest. South Korea is growing on National Health Insurance coverage extensions.

Middle East & Africa: Emerging opportunity at 8.20% CAGR (2026--2035). The Middle East & Africa is bifurcated between well-funded Gulf states and resource-constrained Sub-Saharan nations. Saudi Arabia leads the region with Vision 2030 healthcare diversification, with the Ministry of Health targeting a 30% increase in home-care service capacity by 2028. The UAE is growing on DHA home-care licensing framework. South Africa contributes through private medical aid schemes. Egypt is growing on population scale and rising NCD burden. Diagnostic infrastructure gaps in LMICs remain a restraint.

South America: Growing presence at USD 21.30 Billion in 2025. Brazil anchors South America's Home Healthcare Market at ~62.40% of regional revenue, with the Unified Health System (SUS) progressively integrating home-care modalities into primary-care budgets. Access to advanced home healthcare technologies remains limited by import dependencies, though private hospital groups have launched branded hospital-at-home services. Argentina is growing on obra social coverage modernization. South America's procurement runs largely through public health systems, which pool demand to secure competitive pricing.

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## Regional Outlook

North America -- Dominant Market (~39.20% Share, 2025)

The United States generates approximately 78.50% of North American Home Healthcare Market revenue, driven by the Medicare fee-for-service and Medicare Advantage penetration, CMS Acute

Hospital Care at Home waiver programs, commercial insurance coverage of home-based skilled nursing and rehabilitation therapy as first-line care, and broad reimbursement for home healthcare regimens---a single policy ecosystem that converted an institution-dominated market into one with a structural home-based care tail.

CMS reimbursement for hospital-at-home programs under the hospital outpatient prospective payment system has driven adoption in academic medical centers, while community oncology networks increasingly prescribe home-based post-acute care options to manage inpatient capacity.

Europe -- Second Largest (USD 97.60 Billion, 2025)

Europe's Home Healthcare Market reflects divergent national strategies---Germany leads regionally with DiGA digital therapeutics mandate at 7.85% CAGR, while the UK historically used selective home-care targeting before broadening coverage through NHS virtual ward programs. France contributes ~18.30% of regional share through its HAD (Hospitalisation à Domicile) framework.

Italy contributes through PNRR home-care investment at 7.40% CAGR. Spain is growing at steady pace on Ley de Dependencia expansion. The Nordic countries hold significant regional share on advanced digital health infrastructure. Russia contributes through private clinic networks and urban concentration.

Asia-Pacific -- Fastest-Growing Region (10.15% CAGR, 2026--2035)

Asia-Pacific is the engine of the Home Healthcare Market. China holds the largest regional share with significant regional revenue, driven by aging population and 14th Five-Year Plan health targets. India is growing at 11.60% CAGR on the back of Ayushman Bharat expansion and private home-care startup funding---several venture-funded platforms raised Series B and C rounds exceeding USD 50 Million in 2023--2024. Japan contributes through NHI pricing for next-gen home-care technologies, with its super-aged society generating per-capita home-care expenditure that ranks among the world's highest. South Korea is growing at 8.90% CAGR on National Health Insurance coverage extensions.

Middle East & Africa -- Emerging Opportunity (8.20% CAGR, 2026--2035)

The Middle East & Africa is bifurcated between well-funded Gulf states and resource-constrained Sub-Saharan nations. Saudi Arabia leads the region with Vision 2030 healthcare diversification, contributing ~32.50% of regional share---the Ministry of Health is targeting a 30% increase in home-care service capacity by 2028 through public-private partnerships and digital health mandates.

The UAE is growing at 9.10% CAGR on DHA home-care licensing framework. South Africa

contributes through private medical aid schemes. Egypt is growing at 8.40% CAGR on population scale and rising NCD burden. NGO-supported health access programs underpin demand across the rest of the region.

## Competitive Landscape and Recent Developments

The Home Healthcare Market exhibits moderate concentration, with the top five companies holding an estimated 28--34% combined revenue share. The Herfindahl-Hirschman Index sits in the 550--750 range, reflecting a mix of multinational medical device conglomerates, dedicated home health service providers, and venture-backed software entrants. Technology adoption and platform consolidation are gradually fragmenting traditional segments, though integrated device-software ecosystems sustain competitive moats for first-movers.

The competitive landscape is stratified between connected care device pioneers serving global home healthcare markets, platform-based care coordination specialists capturing software tenders, and dedicated home health service providers consolidating the staffing segment.

## KEY COMPANIES AND RECENT MILESTONES

Koninklijke Philips N.V. (2024--2025): Maintains leadership with connected care devices and telehealth platforms, commanding ~5--8% of global Home Healthcare Market revenue. Integrated device-software ecosystem positioning in specialty segments offsets pure-play competition in commoditized markets.

Baxter International Inc. (2024--2025): Home infusion therapies and renal care reinforce the clinical depth in acute home therapies positioning, holding ~4--7% of global revenue. The company benefits from the structural home infusion tail created by expanded hospital-at-home program investment.

Abbott Laboratories (2024--2025): Continuous glucose monitoring systems and diagnostics reinforce the wearable sensor leadership positioning, holding ~4--6% of global revenue. CGM adoption surge across diabetes indication segment anchors a strong global franchise.

GE HealthCare Technologies (2024--2025): Patient monitoring and imaging reinforce the hospital-to-home continuum technology positioning, holding ~3--5% of global revenue.

## Future Outlook: 2026--2035

By 2030, AI-powered predictive care models will become the operating system of home healthcare management. The convergence of remote patient monitoring and machine-learning clinical decision support will reshape the Home Healthcare Market through the late 2020s. By 2030, an estimated 40% of newly eligible Medicare beneficiaries will receive at least one home-based acute care episode, creating a preventive-care revenue loop.

Generative-AI care-plan engines are expected to automate 35--40% of clinical documentation tasks currently performed by home health nurses, freeing an estimated 12 million labor hours annually in the U.S. alone. These tools will evolve from documentation aids into real-time clinical copilots that synthesize wearable data, pharmacy records, and social determinants into adaptive visit protocols.

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