

Philippines Palliative Care Market Report and Forecast 2024-2032

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Report description:

Philippines Palliative Care Market Report and Forecast 2024-2032

Philippines Palliative Care Market Overview

The Philippines palliative market is the market for medical care and services that aim to improve the quality of life of patients with life-limiting illnesses and their families. Palliative care can be provided in various settings, such as hospitals, hospices, home-based care, or community-based care. The Philippines palliative market size is projected to grow at a compound annual growth rate (CAGR) of 5.9% during the forecast period of 2024-2032. The growth of the market is driven by the increasing prevalence of chronic and non-communicable diseases, the aging population, the rising awareness and demand for palliative care, and the supportive government policies and initiatives. However, the market also faces some challenges, such as the lack of trained and qualified palliative care professionals, the low accessibility and affordability of palliative care services, the cultural and religious barriers, and the limited availability of essential medicines and equipment.

Philippines Palliative Care Market Key Drivers and Constraints

-□The increasing prevalence of chronic and non-communicable diseases, such as cancer, cardiovascular diseases, diabetes, chronic respiratory diseases, and dementia, is one of the major drivers of the Philippines palliative market. According to the World Health Organization (WHO), chronic and non-communicable diseases accounted for 71% of the total deaths in the Philippines in 2016, and 29% of these deaths occurred before the age of 70. These diseases often require long-term and complex care, which can cause physical, emotional, social, and financial burdens to the patients and their families. Palliative care can help to relieve the symptoms, pain, and stress of these diseases, and provide holistic and compassionate care to the patients and their families.

-□The aging population is another key driver of the Philippines palliative market. According to the Philippine Statistics Authority (PSA), the proportion of the population aged 60 years and above increased from 6.8% in 2010 to 8.2% in 2018 and is expected to reach 10.8% by 2030. The aging population is more susceptible to chronic and non-communicable diseases and has a higher need for palliative care services. Palliative care can help to improve the quality of life and dignity of the elderly and support their end-of-life preferences and decisions.

-□The rising awareness and demand for palliative care is another factor that contributes to the growth of the Philippines palliative market. The awareness and demand for palliative care have increased in recent years, due to the efforts of various stakeholders, such as the government, the health sector, the civil society, the media, and the academe. The government has enacted several

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laws and policies to promote and integrate palliative care into the health system, such as the Republic Act No. 11313 or the National Integrated Cancer Control Act of 2019, the Republic Act No. 11136 or the Mental Health Act of 2018, and the Philippine Health Insurance Corporation (PhilHealth) Circular No. 2017-0021 or the Z Benefit Package for Palliative and Supportive Care Services. The health sector has also established and strengthened the palliative care units and teams in various hospitals and health facilities, and developed the clinical practice guidelines and standards for palliative care. Civil society has also played an active role in advocating and providing palliative care services, especially to the underserved and marginalized populations. The media and the academy have also helped to raise awareness and education on palliative care among the public and health professionals.

-□However, the Philippines palliative market also faces some constraints that hamper its growth and development. One of the major constraints is the lack of trained and qualified palliative care professionals, such as doctors, nurses, social workers, psychologists, chaplains, and volunteers. According to the Philippine Cancer Society (PCS), there are only about 50 palliative care specialists and 500 palliative care nurses in the country, which is far below the estimated need of 1,200 palliative care specialists and 12,000 palliative care nurses. The lack of palliative care professionals limits the availability and quality of palliative care services and creates a gap between the supply and demand of palliative care.

-□Another constraint is the low accessibility and affordability of palliative care services, especially for the poor and rural populations. According to the PCS, only about 10% of the patients who need palliative care in the Philippines have access to it, and most of them are from the urban and affluent areas. The accessibility and affordability of palliative care services are affected by several factors, such as the geographic distribution of palliative care facilities, the transportation and communication barriers, the out-of-pocket costs and the limited coverage of health insurance, and the social and cultural stigma and discrimination.

-□A third constraint is the cultural and religious barriers that influence the attitudes and behaviors of the patients, their families, and the health professionals towards palliative care. Some of the cultural and religious barriers include the preference for aggressive and curative treatments, the belief in miracles and divine interventions, the fear of death and dying, the reluctance to discuss end-of-life issues, and the resistance to pain relief and opioids. These barriers can affect the acceptance and utilization of palliative care services, and the communication and collaboration among the patients, their families, and the health professionals.

-□A fourth constraint is the limited availability of essential medicines and equipment for palliative care, especially the opioids and the morphine. According to the WHO, the Philippines ranked 113th out of 172 countries in terms of the per capita consumption of morphine in 2015, which indicates a low access to pain relief and palliative care. The availability of opioids and morphine is restricted by several factors, such as the strict regulations and policies, the inadequate supply and distribution, the high costs and taxes, and the lack of knowledge and training among the health professionals and the pharmacists.

Philippines Palliative Care Market Trends and Developments

-□Growing Awareness: There is a growing awareness among healthcare professionals and the general public about the benefits of palliative care, not only for end-of-life patients but also for those with chronic and life-limiting illnesses.

-□Integration into Healthcare System: Efforts are being made to integrate palliative care services into the mainstream healthcare system, including hospitals and community-based settings, to ensure that patients have access to these services throughout their illness journey.

-□Training and Education: There is an increasing emphasis on training and educating healthcare professionals in palliative care to address the shortage of skilled professionals in this field. This includes the development of palliative care courses and programs for doctors, nurses, and other healthcare workers.

-□Policy and Advocacy: Advocacy efforts are underway to promote policies that support the development and expansion of palliative care services in the Philippines. This includes advocating for the inclusion of palliative care in national health insurance coverage and the development of national guidelines for palliative care.

-□Community-Based Palliative Care: There is a trend towards providing palliative care services in community settings, allowing patients to receive care in the comfort of their homes and reducing the burden on hospital resources.

-□Collaboration with NGOs: Non-governmental organizations (NGOs) and charitable institutions play a significant role in providing palliative care services, especially in underserved areas. Collaborations between the government, NGOs, and private sector are essential for expanding access to palliative care.

-□Cultural Sensitivity: Recognizing the importance of cultural sensitivity in palliative care, efforts are being made to ensure that

care is provided in a manner that respects the cultural and spiritual beliefs of patients and their families.

Philippines Palliative Care Market Segmentation

Market Breakup by Condition

- Cardiovascular Diseases
- Cancer
- Chronic Respiratory Diseases
- Others

Market Breakup by Service Type

- Private Residence Care
- Hospice Inpatient Care
- Nursing Home and Residential Facility Care
- Others

Market Breakup by End User

- Hospitals
- Home Care Settings
- Palliative Care Centers
- Long- Term Care Centers & Rehabilitation Centers

Philippines Palliative Care Market Competitive Landscape

The Philippines palliative market is characterized by the presence of various stakeholders, such as the government, the health sector, the civil society, and the media. The landscape of the Philippines palliative care market features a diverse array of companies, each contributing to the comprehensive care of individuals facing life-limiting illnesses. Life Care Independent and Assisted Living, ActiveCare Home Health Solutions, St. Luke's Medical Center, Centura Health, Cardinal Santos Medical Center, Carelon Health, HospiceWorks, Seymour Health, Kindred Health Incorporated, FC Compassus LLC, Revera Inc., and LHC Group, Inc. enhances the landscape with its wide array of services, ensuring accessible and tailored palliative care options are available. Together, these organizations form a vital part of the Philippines' palliative care ecosystem, offering a spectrum of services from home-based care to specialized medical treatment in various settings. Here is some major company news related to the domain.

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*Additional insights provided are customisable as per client requirements.

* The coverage of the Market Landscape section depends on the data availability and may cover a minimum of 80% of the total market. The EMR team strives to make this section as comprehensive as possible.

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