

Healthcare Finance Solutions Market Assessment, By Equipment Type [Diagnostic/Imaging Equipment, Specialist Beds, Surgical Instruments, Decontamination Equipment, IT Equipment], By Facility Type [Hospitals and Health Systems, Outpatient Imaging Centers, Outpatient Surgery Centers, Physician Practices and Outpatient Clinics, Diagnostic Laboratories, Urgent Care Clinics, Skilled Nursing Facilities, Pharmacies, Others], By Services [Equipment And Technology Finance, Working Capital Finance, Project Finance Solutions, Corporate Lending], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global healthcare finance solutions market is projected to witness a CAGR of 7.71% during the forecast period 2024-2031, growing from USD 127.43 billion in 2023 to USD 230.79 billion in 2031. Healthcare finance solutions are designed to support the financial management and operational efficiency of healthcare organizations. These solutions are crucial for helping healthcare providers manage costs, streamline administrative tasks, and invest in advanced technologies and infrastructure while ensuring high-quality patient care.

Growth in this market during the forecast period can be attributed to the geriatric population, prevalent chronic diseases, increased adoption of electronic health records, demand for cost-effective financial solutions, and expansion of healthcare financial processes. Some of the major trends during the period include advanced analytics, AI-enabled tools, blockchain

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technology adoption, technological advancements, and progress in medical technology.

Advanced technologies in healthcare finance solutions reduce costs, increase efficiency, and enhance patient care. Therefore, the global market is experiencing rapid growth. AI supports better diagnostics and patient management, whereas blockchain ensures secure transactions with the correction of medical records. EHRs provide streamlined data management and coordination of care, whereas telemedicine enhances access to care. Big Data analytics optimize financial operations, whereas cloud computing facilitates easier access to data and RPA automates tasks. The IoMT is the avenue through which it is possible to have live patient monitoring, and mHealth tools allow patients to take control of their health. Cybersecurity protects sensitive information from threats. These technologies are changing the face of healthcare financing by improving operations and patient results.

For instance, in July 2024, Healthcare startup Icanheal raised USD 1.8 million (INR 15 crore) in its seed round from IvyCap Ventures. The Mumbai-based startup aims to democratize access to advanced medical interventions, including medicines, devices, and hospital surgeries. It shows that potential firms are viewing emerging healthcare solutions firms.

Rise in Chronic Diseases Prevalence to Drive Market Growth

The growth of the healthcare finance solutions market is expected to be driven by the increasing prevalence of chronic diseases in the future. Chronic diseases are long-lasting conditions that typically require ongoing medical attention and can impact daily activities or quality of life. The rising prevalence of chronic diseases is attributed to factors such as exposure to air pollution, chemicals, toxins, lifestyle changes, and genetic factors. Healthcare finance solutions play a crucial role in ensuring financial stability, optimizing revenue cycles, and meeting the evolving financial needs of healthcare organizations dealing with chronic conditions.

As per the article published by the United Nations in August 2024, a staggering 175,000 people die from heat-related causes every year in Europe, and it is set to soar in line with our steadily warming planet. In Europe, Temperature extremes such as these are really exacerbating chronic conditions, including cardiovascular, respiratory, and cerebrovascular diseases, mental health, and diabetes-related conditions.

Increasing Demand for Effective Revenue Cycle Management

Healthcare finance solutions are changing from a volume-based method of care to a value-based method of care. The value-based care system replaces the fee-for-service method in a volume-based system where a patient with a need does not have an effective outcome while receiving the service. In the fee-for-service system, healthcare providers are paid for every service they provide with no regard to the effectiveness of the services or the needs a patient may have. The ultimate objective of the value-based care delivery model would be a better health outcome at reasonable costs. In this model, payers can identify the main service provider who will handle the budget for the secondary healthcare providers, hence removing the needed immediate-to-provider payment.

For instance, in July 2024, the American Medical Association (AMA) discussed the rising cost of healthcare and the shift to value-based care models. The AMA highlighted how value-based care aims to improve patient outcomes and control costs by focusing on the quality rather than the quantity of services provided. This shift will lead to more equitable healthcare payments and better patient outcomes.

Advanced Technologies to Fuel Market Growth

The global market for healthcare finance solutions is rising with the integration of cutting-edge technologies, including the streamlining and cost-saving benefits, along with the enhancement of care. These include AI, blockchain, telemedicine, and EHRs, complementing each other to synchronize their provision in healthcare financial management. As these technologies continue to advance, they transform how healthcare providers manage financial processes and ensure that patient outcomes are improved through better data analysis, real-time monitoring, and secure information handling. Increased use of cloud computing, cybersecurity solutions, and RPA adds fuel to the growth of the market, with the ability of healthcare organizations to improve their operations and reduce operational risks.

Thus, these technologies facilitate certain benefits in the growth of the healthcare finance solutions market. As an illustration, the utilization of AI has been applied to predictive analytics and the automation of administrative work to reduce labor expense costs while improving decision-making capacities. Conversely, blockchain ensures security and transparency in healthcare system financial transactions, thus reducing fraud and enhancing trust among patients, service providers, and payers. Telemedicine, however, has transformed the way care is delivered and accessed remotely, reducing overhead costs and improving patient

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satisfaction. Moreover, with the elevated adoption of Big Data analytics, healthcare organizations are capable of gaining insights from large datasets to optimize financial performance and clinical outcomes. As providers embrace advanced technologies, the healthcare finance solutions market is expected to continue to grow and absorb all the constant demands for efficiency and cost-effectiveness with great care for patients.

For instance, in September 2024, Royal Philips, a global leader in health technology, and Jackson Health System, one of the nation's largest public health systems in the United States, announced the results of a collaborative Life Cycle Assessment (LCA) measuring the sustainability impact of transitioning to Philips next generation monitoring solutions. The Philips patient monitors, deployed as an Enterprise Monitoring as a Service (EMaaS) business model, can help reduce carbon emissions by 685.1 tons of CO2e or 47% compared to previous systems. This significant reduction eliminates the need for an estimated 420,000 disposable AA batteries and 6.5 million sheets of paper, which can allow the healthcare system to save USD 1.2 million over a 10-year device lifetime.

Equipment and Technology Finance Services to Dominate the Market Share

The most widely used services globally in the healthcare finance solutions market are equipment and technology finance. This segment accounted for the largest market share due to the significant capital required for setting up healthcare facilities and purchasing costly medical equipment. Equipment and technology finance in the healthcare finance solutions market plays a vital role in supporting healthcare providers with the acquisition of advanced medical equipment and technology. This includes equipment and technology finance and critical financing of healthcare providers to buy state-of-the-art medical equipment and technology. Many medical devices, particularly MRI machines, CT scanners, and some surgical instruments, are capital-intensive, which means that large upfront costs can burden a provider with the need to obtain them. Due to flexible financing options such as loans, leases, and installment plans, healthcare organizations can fine-tune their financial strategies according to their needs. This means that it is easier for providers to have access to cutting-edge technology while helping patients with improved care and operational efficiency through the latest medical advancements.

For instance, in September 2024, Merck and Siemens entered a strategic partnership to drive digital transformation across all three Merck business sectors, as outlined in a newly signed Memorandum of Understanding (MoU). Under this collaboration, Siemens has been named one of Merck's global preferred suppliers for next-level automation, leveraging the Siemens Xcelerator platform to enhance global smart manufacturing. This partnership will enable Merck to adopt cutting-edge production technologies, setting new standards in modular manufacturing and further advancing the future of digital manufacturing processes.

North America to Dominate Healthcare Finance Solutions Market Share

North America dominates the share of the global healthcare finance solutions market as the region has the most developed healthcare infrastructure, comprising state-of-the-art medical facilities and advanced technology, thus increasing demand for financing solutions to support the acquisition of such equipment and an upgrade in technology. North America houses some of the world's top healthcare financing providers, and increased investment in research and development is propelling innovation. The high healthcare spending in the region, currently one of the highest globally, further accelerates the market as healthcare providers seek financing options to manage costs. Furthermore, supportive policies and regulatory conditions promote the adoption of advanced healthcare technologies and financial solutions in North America. All these factors consequently make North America a leading player in the global healthcare finance solutions market.

For instance, in February 2024, Anatomy Financial, which is in North America, launched its AI-powered solutions for healthcare companies that include medical and dental practices, digital health services, and billing companies in their portfolio. This solution will automate the back office of healthcare by bringing bank claims and accounting data into one place using AI, allowing real-time financial insights and automated reconciliation.

Future Market Scenario (2024 - 2031F)

□□The growing prevalence of chronic diseases is anticipated to drive the expansion of the healthcare finance solutions market in the forecast years.

□□The rising global elderly population plays a significant role in the market's growth.

□□As the healthcare industry shifts towards value-based care models, competitors will need to offer financial solutions that support this transition. It includes providing flexible financing options for healthcare providers to invest in technology and infrastructure

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that improve patient outcomes and reduce costs.

Competitors are expected to focus on expanding their presence in emerging markets such as Asia-Pacific, Latin America, and Africa. These regions are experiencing rapid economic growth, increasing healthcare investments, and rising demand for advanced medical technology.

Key Players Landscape and Outlook

The competition in the healthcare finance solutions market is fierce. Technological innovation is a great deal as companies endeavor to deliver advanced financial technologies that enhance operations and patient care. Diversification of services is highly valued, and companies are innovating their services to finance equipment, working capital, and project finance. A strong global presence is equally important as it will unlock emerging markets and help increase market shares. Sustainability has emerged as a significant competitive factor, considering the priority with which organizations are keen on adopting environmentally friendly practices and solutions in curbing their environmental footprint.

In September 2024, Stryker announced that it had completed the acquisition of NICO Corporation, a privately held company providing a systematic approach to minimally invasive surgery for tumor and Intracerebral Hemorrhage (ICH) procedures. This acquisition further strengthens Stryker's commitment to neurotechnology through tumor and stroke care.

In August 2024, Epic announced that individuals would be able to release their health data on chosen applications, giving them more direct control over their medical information. This seemingly simple feat is a major technological leap for the healthcare sector and reflects the beginning of a new standard of data-sharing practices that are set to take shape across the nation.

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