

## **UAE Home Healthcare Industry - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 90 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

UAE Home Healthcare Industry Analysis

The UAE home healthcare market is expected to grow from USD 1.18 billion in 2025 to USD 1.31 billion in 2026 and is forecast to reach USD 2.19 billion by 2031 at 10.84% CAGR over 2026-2031. Steady expansion reflects compulsory national health insurance that came into force on 1 January 2025, rising chronic disease prevalence, and rapid uptake of digital health tools. Private equity inflows, particularly from PureHealth and other regional investors, continue to consolidate service capacity, while AI-driven telehealth platforms increasingly shape patient expectations. Growth potential is further reinforced by Abu Dhabi and Dubai initiatives that promote virtual nursing, predictive analytics, and unified licensing to streamline clinician deployment across emirates. Medium-term opportunities will emerge in the Northern Emirates, where newly insured expatriate workers broaden the eligible user base for home-based therapies.

UAE Home Healthcare Industry Trends and Insights

Nationwide Mandatory Health Insurance Rollout (2025)

Compulsory basic coverage, priced at AED 320 (USD 87.0) per beneficiary, now extends to roughly 3 million workers who previously lacked formal access to healthcare services. The scheme standardizes home-care benefits across all seven emirates, eliminating gaps that once deterred expatriates from seeking professional in-home support. Co-payments have been set at 20% for inpatient and 25% for outpatient episodes, with no waiting periods for pre-existing conditions—a notable catalyst for wider

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

adoption of domiciliary chronic-disease programs. Providers anticipate an immediate volume uplift, especially for low-income migrant families located in the Northern Emirates. Early insurance claims data show a surge in reimbursed home nursing visits, confirming latent demand previously suppressed by cost barriers.

#### Aging Resident Base & Chronic-Disease Burden

Cancer remains the UAE's third leading cause of death; breast, colorectal, and thyroid malignancies together represent a growing caseload that benefits from post-acute home programs. Diabetes afflicts 1 in 20 residents, creating sustained need for medication reconciliation services and glucose monitoring in domestic settings. The National Policy for Senior Citizens emphasizes mobile clinics and caregiver training, prompting providers to bundle physiotherapy and nutritional counseling into turnkey home packages. As median age rises, demand concentrates in Abu Dhabi and Dubai but is spreading to peripheral emirates through outreach partnerships. Long-term care strategies therefore hinge on scalable workforces trained in geriatrics, wound care, and palliative support.

#### Shortage Of Licensed Home-Care Clinicians

The UAE has 29,860 physicians and 63,366 nurses serving 11.35 million residents, an insufficient ratio for the rising caseload of in-home therapy. Tax-free wages up to USD 270,000 entice expatriate specialists, yet turnover persists due to cultural adjustments, language gaps, and housing costs. The October 2024 unified licensing reform eases credential transfers but cannot offset nationwide supply constraints. Providers therefore rely on tele-supervision models and international recruitment drives, especially for ICU and geriatric nurses.

Other drivers and restraints analyzed in the detailed report include:

Digitally Enabled Remote-Monitoring Initiatives  
Post-Covid Preference for In-Home Care  
Limited Device Reimbursement By Insurers

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Therapeutic products held 46.28% of the UAE home healthcare market share in 2025. The segment benefits from high chronic-disease incidence that necessitates medication management and IV infusions at home. Device safety standards under ISO 13485 and Ministry registration requirements favor established vendors with robust quality dossiers. Mobility care products follow in revenue, yet they post the fastest 11.21% CAGR thanks to growing post-operative rehab demand and the senior citizen policy that supports assistive technologies.

Diagnostic products remain a smaller but strategic niche, capitalizing on telemedicine and AI image-analysis innovations. The UAE home healthcare market size attached to diagnostic kits will scale as insurance begins to reimburse remote testing bundles. Stakeholders therefore invest in Bluetooth glucometers and portable spirometry lines, betting on AI algorithms that flag anomalies before outpatient visits.

Rehabilitation therapy commanded 37.74% of the UAE home healthcare market size in 2025. Early hospital discharge policies and value-based reimbursement tilt volumes into the community, making physiotherapy and occupational therapy core revenue lines. Respiratory therapy, at an 11.37% CAGR, is lifted by COPD, post-Covid fibrosis, and environmental allergens.

Infusion therapy, though niche, rides oncology and long-term antibiotic protocols. Amana Healthcare's regional expansion showcases profitable complex case management frameworks that integrate pharmacy logistics, nurse call centers, and

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

emergency back-up teams. Other ancillary services, including wound and ostomy care, add cross-sell potential, forging comprehensive care plans that insurers increasingly favor.

The UAE Home Healthcare Market Report is Segmented by Product (Diagnostic Products, Therapeutic Products, Mobility Care Products), Service (Rehabilitation Therapy Services, Respiratory Therapy Services, Infusion Therapy Services, Other Services), Software (Clinical Management Systems, and More), Patient Condition (Chronic Respiratory Diseases, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

NMC Healthcare Manzil Home Health Services Aster DM Healthcare Mediclinic Middle East VPS Healthcare SEHA Emirates Home Healthcare Cleveland Clinic Abu Dhabi (Home Care) Amana Healthcare Prime Healthcare Group Emirates Home Nursing THB Home Health Care Health2Home Omega Care Dubai Ishraq Home Health Care Alleanza Healthcare Wahat Al Aman Home Healthcare Sublime Nursing Burjeel Home Care Al Zeyarat Home Healthcare

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

### **Table of Contents:**

- 1 Introduction
  - 1.1 Study Assumptions & Market Definition
  - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
  - 4.1 Market Overview
  - 4.2 Market Drivers
    - 4.2.1 Nationwide Mandatory Health Insurance Rollout (2025)
    - 4.2.2 Aging Resident Base & Chronic-Disease Burden
    - 4.2.3 Digitally Enabled Remote-Monitoring Initiatives
    - 4.2.4 Post-Covid Preference For In-Home Care
    - 4.2.5 Private-Equity & PPP Inflows Into Home Care
    - 4.2.6 AI-Powered Triage & Predictive-Care Platforms
  - 4.3 Market Restraints
    - 4.3.1 Shortage Of Licensed Home-Care Clinicians
    - 4.3.2 Limited Device Reimbursement By Insurers
    - 4.3.3 Fragmented Emirate-Level Regulations
    - 4.3.4 Hospital-Centric Cultural Preferences
  - 4.4 Value / Supply-Chain Analysis
  - 4.5 Regulatory Landscape
  - 4.6 Technological Outlook
  - 4.7 Porter's Five Forces

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.7.1 Threat of New Entrants
- 4.7.2 Bargaining Power of Buyers
- 4.7.3 Bargaining Power of Suppliers
- 4.7.4 Threat of Substitutes
- 4.7.5 Intensity of Competitive Rivalry

## 5 Market Size & Growth Forecasts (Value, USD)

- 5.1 By Product
  - 5.1.1 Diagnostic Products
  - 5.1.2 Therapeutic Products
  - 5.1.3 Mobility Care Products
- 5.2 By Service
  - 5.2.1 Rehabilitation Therapy Services
  - 5.2.2 Respiratory Therapy Services
  - 5.2.3 Infusion Therapy Services
  - 5.2.4 Other Services
- 5.3 By Software
  - 5.3.1 Clinical Management Systems
  - 5.3.2 Agency Software
  - 5.3.3 Hospice Software
- 5.4 By Patient Condition
  - 5.4.1 Chronic Respiratory Diseases
  - 5.4.2 Diabetes & Renal Disorders
  - 5.4.3 Cancer & Palliative Care
  - 5.4.4 Post-operative / Rehab

## 6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Market Share Analysis
- 6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)
  - 6.3.1 NMC Healthcare
  - 6.3.2 Manzil Home Health Services
  - 6.3.3 Aster DM Healthcare
  - 6.3.4 Mediclinic Middle East
  - 6.3.5 VPS Healthcare
  - 6.3.6 SEHA Emirates Home Healthcare
  - 6.3.7 Cleveland Clinic Abu Dhabi (Home Care)
  - 6.3.8 Amana Healthcare
  - 6.3.9 Prime Healthcare Group
  - 6.3.10 Emirates Home Nursing
  - 6.3.11 THB Home Health Care
  - 6.3.12 Health2Home
  - 6.3.13 Omega Care Dubai
  - 6.3.14 Ishraq Home Health Care
  - 6.3.15 Alleanza Healthcare
  - 6.3.16 Wahat Al Aman Home Healthcare

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 6.3.17 Sublime Nursing
- 6.3.18 Burjeel Home Care
- 6.3.19 Al Zeyarat Home Healthcare

## 7 Market Opportunities & Future Outlook

- 7.1 White-space & Unmet-need Assessment

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**UAE Home Healthcare Industry - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 90 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

