



# Elderly Care Homes in Belgium



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# The Belgian elderly care home market contains 1.280 homes totaling a market size of €2,2 billion

## Context

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The elderly care home market in Belgium is a growing industry, as the country's **population ages and the demand for long-term care increases**. This market considers **care homes, residential homes and nursing homes**.

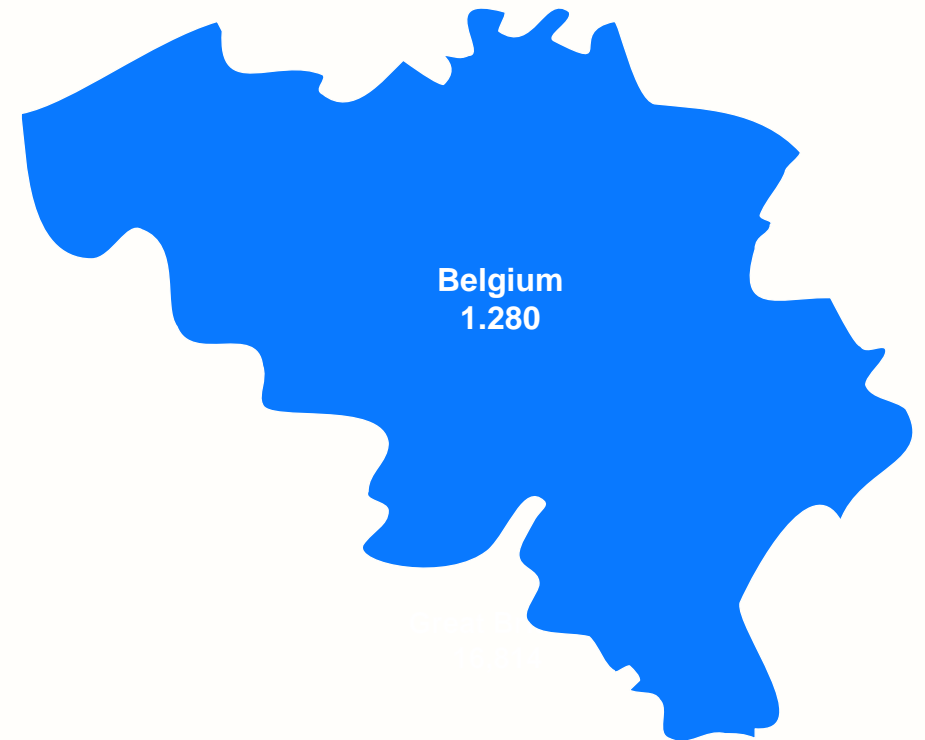
There are **1.280 care homes** in Belgium, totaling a **market size of €2,2bn**. The homes in this market are run by both **non-profit and for-profit** organizations, and are highly regulated by the government. The market is funded by a combination of government subsidies, social security, and private payments.

The **Belgian government** has also implemented several policies aimed at **increasing the number of care home places and improving the quality of care**. These include the "Wet Bijzondere Ziektekosten" (Special Health Care Costs Act) and the "Wet op de Medische Hulp in de Verpleging en Verzorging" (Law on Medical Assistance in Nursing and Care).

In recent years, there has been a shift towards **more personalized and home-like care for the elderly**, as well as a focus on integrating care homes into the community. This has led to the development of small-scale care homes, which offer a more intimate and individualized living environment for residents.

## Geographical coverage

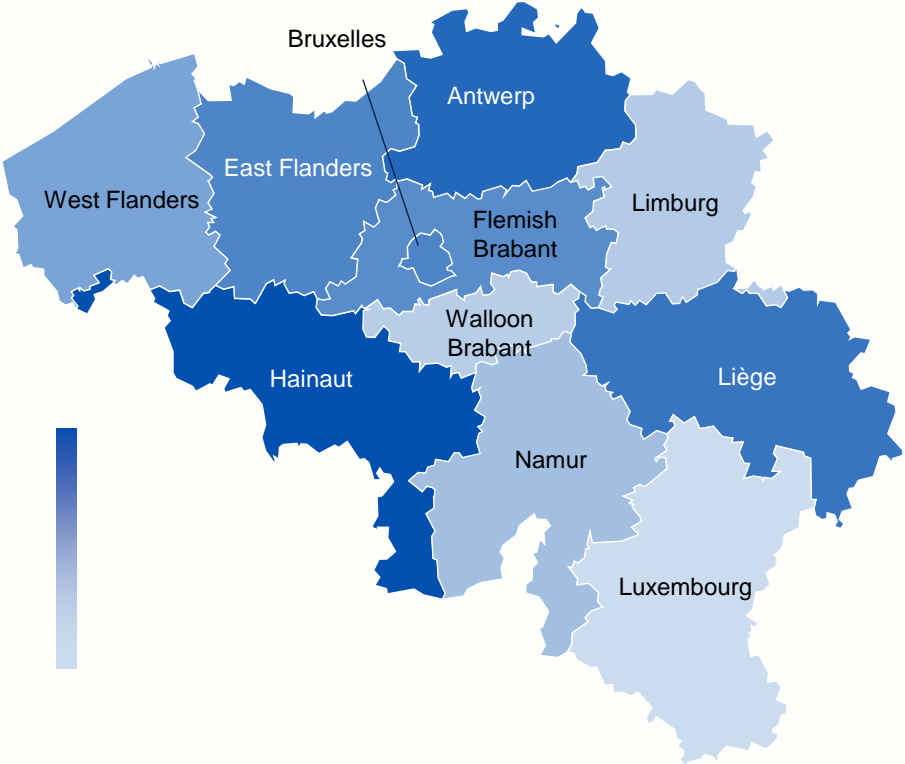
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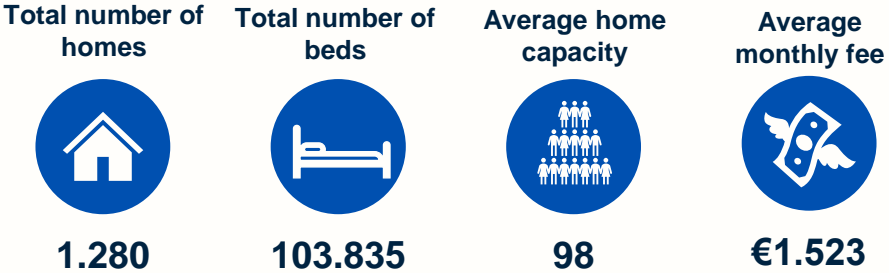
# Statistics Belgium

There are 1.280 elderly care homes that account for 103.835 beds

## Number of homes per region



## Aggregated country statistics\*



## Per company data included in the database

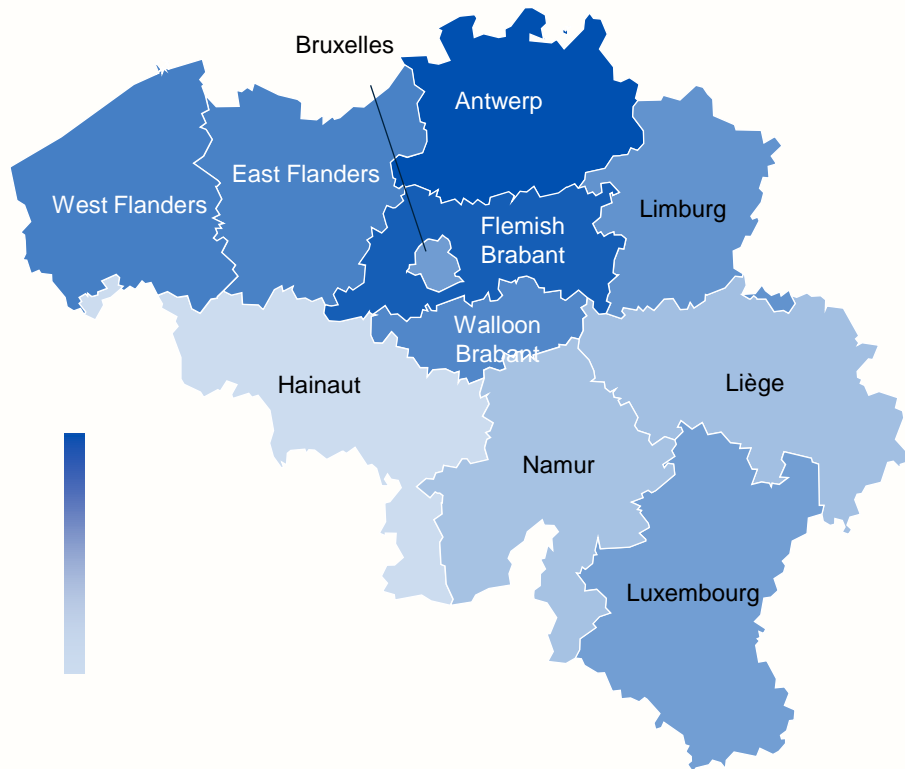
- Name
- Address
- City
- Region
- Website
- Price
- Capacity
- Phone Number

Note: The dataset contains data as of 15/12/22

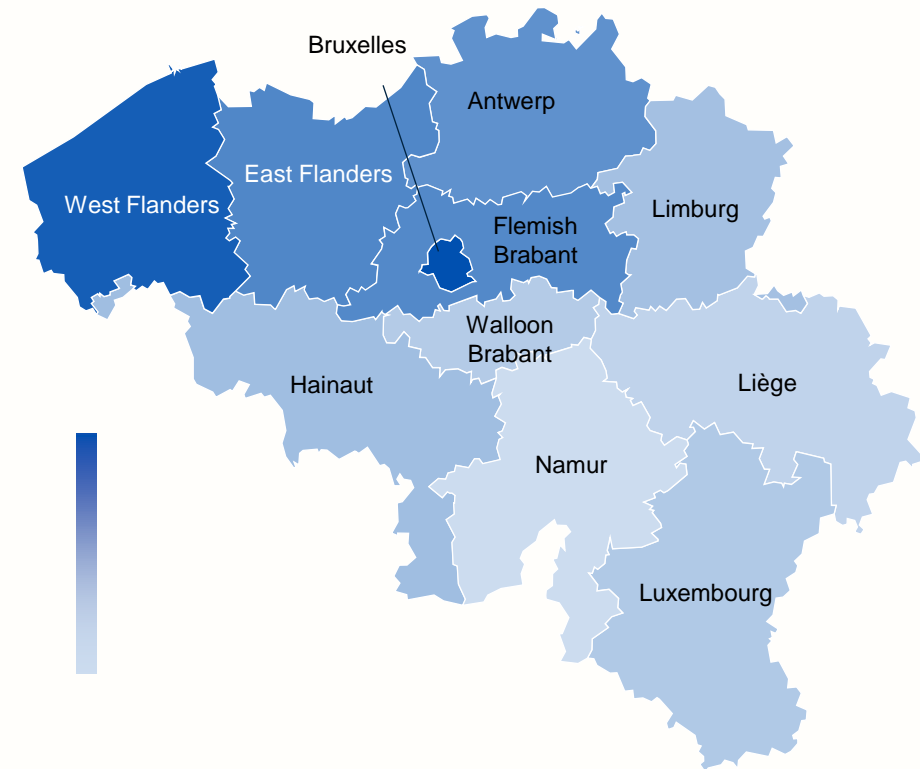
# Belgium Regional Statistics

The largest homes are in Brussels and West Flanders, while high monthly fees are in Antwerp

Average Monthly Fee per Bed by Region



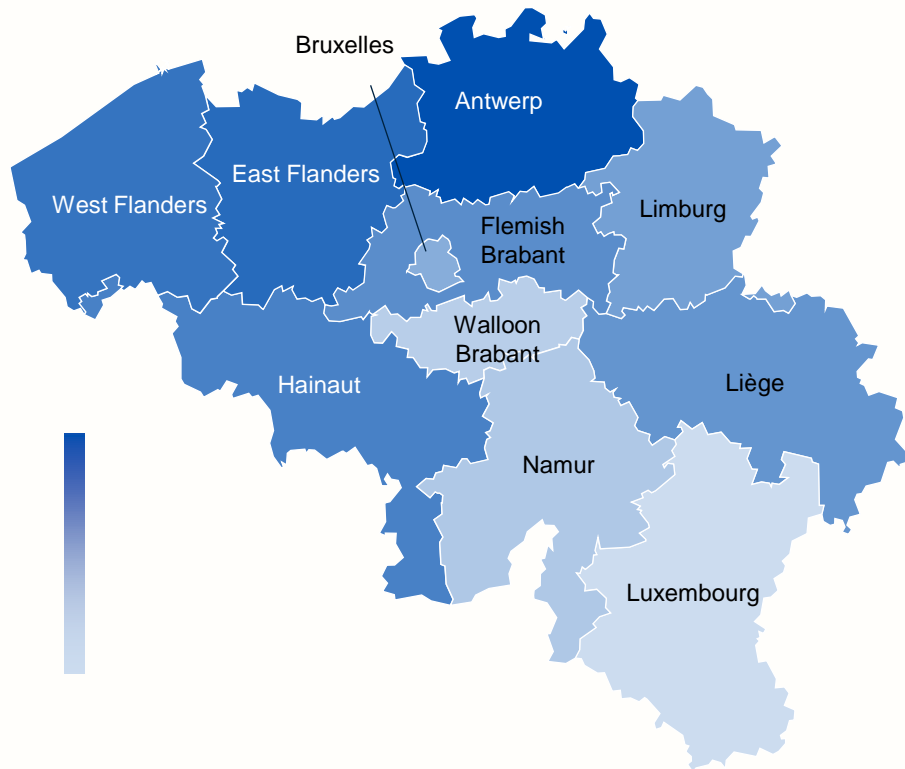
Average Care Home Capacity by Region



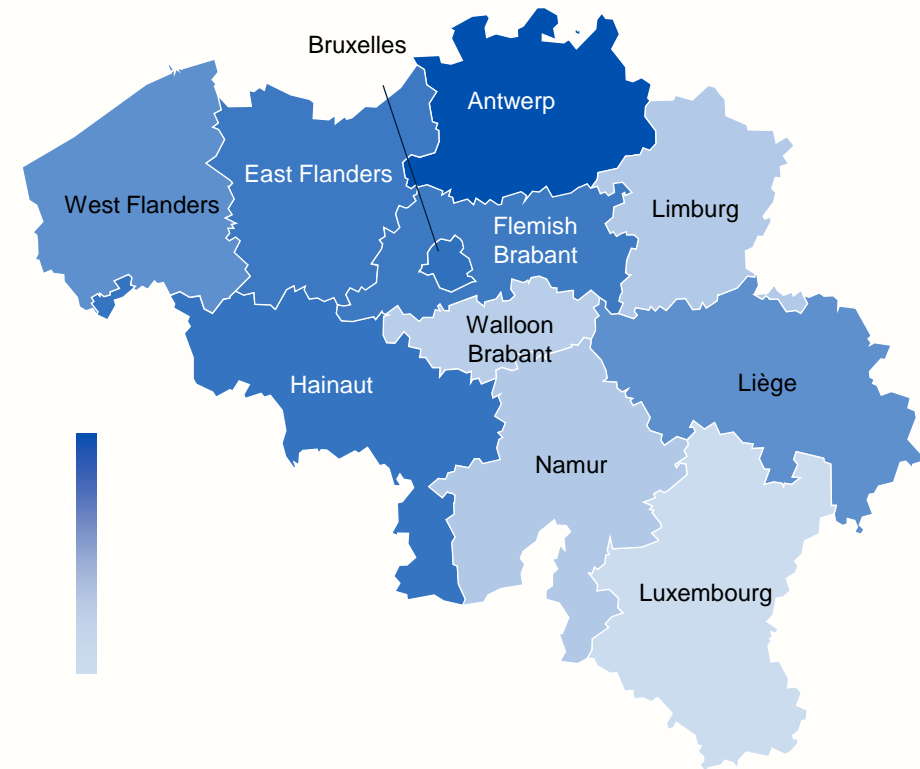
# Belgium Regional Statistics

Antwerp represents the largest market share in the Belgian elderly care home market

Number of Inhabitants over 65 per Bed by Region



Total yearly Market Size\* by Region



Note: The dataset contains data as of 15/12/22

\*Market size = total capacity \* avg price/year \* avg occupancy rate

# Korian is the leading operator in the Belgian Elderly Care Home Market

There are 81 groups in Belgium that operate 665 homes

## Market Definition and Segmentation

- Market : **Belgium**
- **Elderly Care Homes**
- Market Segmentation
  - **Independent**: only **1** home
  - **Small**: between **2 – 10** homes
  - **Medium**: between **11 – 50** homes
  - **Large**: above **50** homes

## Identified Groups in 2022 Dataset\*

Category	Number Groups	Total Number of Homes	Avg Nbr of Homes
Large	3	242	80,7
Medium	8	177	22,1
Small	70	246	3,5
<b>Total Group</b>	<b>81</b>	<b>665</b>	<b>8,2</b>
Independent	615	615	1
<b>Total</b>	<b>696</b>	<b>1280</b>	<b>2,2</b>

Top 10 Groups	# of homes
Korian	109
Armonea	73
Orpea	60
Vulpia	40
Vivalto Home	32
...	26
...	20
...	18
...	15
...	14

# Descriptive statistics of the Belgian care home market dataset

The dataset offers information on 10 different parameters for 1.280 care homes

DESCRIPTION & COUNT OF ALL PARAMETERS		
Parameter	Description	Count
<b>Group</b>	This column shows if the individual care home is part of a group that operates multiple care homes. If the cell is blank, the group is either unknown or the care home is independent.	837 (65,39%)
<b>Name</b>	The name of the elderly care home.	1.280 (100%)
<b>Address</b>	The address that the care home is located, displaying the street and number.	1.280 (100%)
<b>Postal Code</b>	Postal code of the city in which the elderly care home operates.	1.280 (100%)
<b>City</b>	City in which this address is located.	1.280 (100%)
<b>Province</b>	Province that the elderly care home is active in. In Belgium there are 10 provinces in total, encompassing Antwerp, Brabant, West Flanders, East Flanders, Hainaut, Liège, Limburg, Luxembourg, Namur and Brussels.	1.280 (100%)
<b>Region</b>	Region that the elderly care home is active in. In Belgium there are 3 regions in total, encompassing Brussels, Flanders and Wallonia.	1.280 (100%)
<b>Website</b>	The online website of the elderly care home.	515 (40,23%)
<b>Capacity</b>	In this column the capacity of each individual care home can be found. This value is expressed in the number of beds that the home has available.	1.059 (82,73%)
<b>Monthly Fee</b>	The monthly fee of the elderly care home expressed in euros.	1.258 (98,28%)