HANDLE

Capital Compass

Data-Driven Insights Into Hospital Beds

Navigating the evolving landscape of healthcare capital equipment: trends, comparisons, and strategic guidance

Q2 2025

Introduction

Hospital beds are the foundational infrastructure of inpatient care. This is a highly-competitive category where growth has slowed but innovation continues. From 2023 to 2030, Fortune Business Insights projects a Cumulative Annual Growth Rate of 3.8% with the U.S. market increasing from $1.49 billion to $1.94 billion over this period.

This report will focus on the subcategories of Med Surg beds and ICU Beds, which make up 92% of hospital bed replacement cost value in our database. It will exclude smaller subcategories such as Birthing Beds, Behavioral Health Beds, and others. This data represents hundreds of U.S. hospitals analyzed by HANDLE Global, not necessarily the entire U.S. market.

$1.94B

Projected U.S. market size by 2030

3.8% CAGR

Category growth from 2023 to 2030

(Fortune Business Insights)

How can you use this report?

Health System Professionals:

- ✓ Compare your fleet to this mix. Are you standardized on outdated equipment?
- ✓ Plan for replacement with the most popular bed models and observed service life stats across the industry
- ✓ Leverage national data to support internal business cases
- ✓ Pressure challenger brands for better pricing / support

Medical Capital Suppliers:

- ✓ Identify which models are gaining or losing ground nationally
- ✓ Tailor marketing and messaging based on models, features, and market positioning that is trending nationally
- ✓ Inform product roadmaps based on trending feature preferences and models

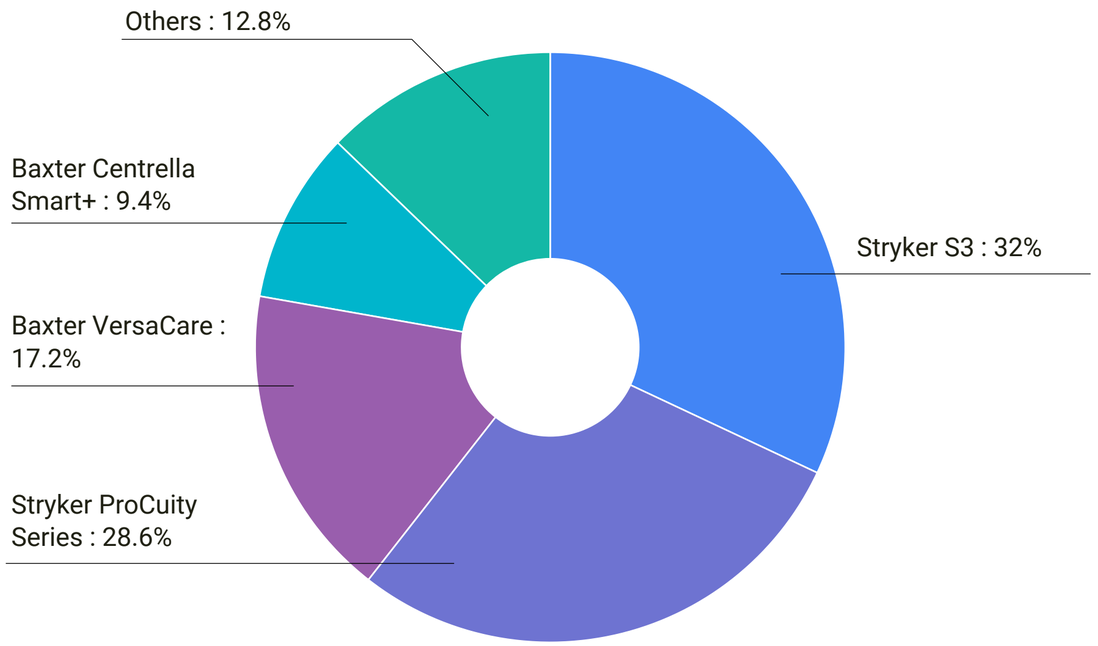
Inside the Numbers: A $40B+ View of Hospital Bed Install Base

Health System Professionals: Stryker and Baxter are the two dominant manufacturers. Optimize spend by maintaining some dual-sourced volume with each, or potentially with a challenger brand such as LINET, Umano Medical, or Arjo.

Medical Capital Suppliers: Ensure your products at least deliver the features of the market's dominant subcategory models. See product spec comparision for more information on features and specifications for the most prevalent models.

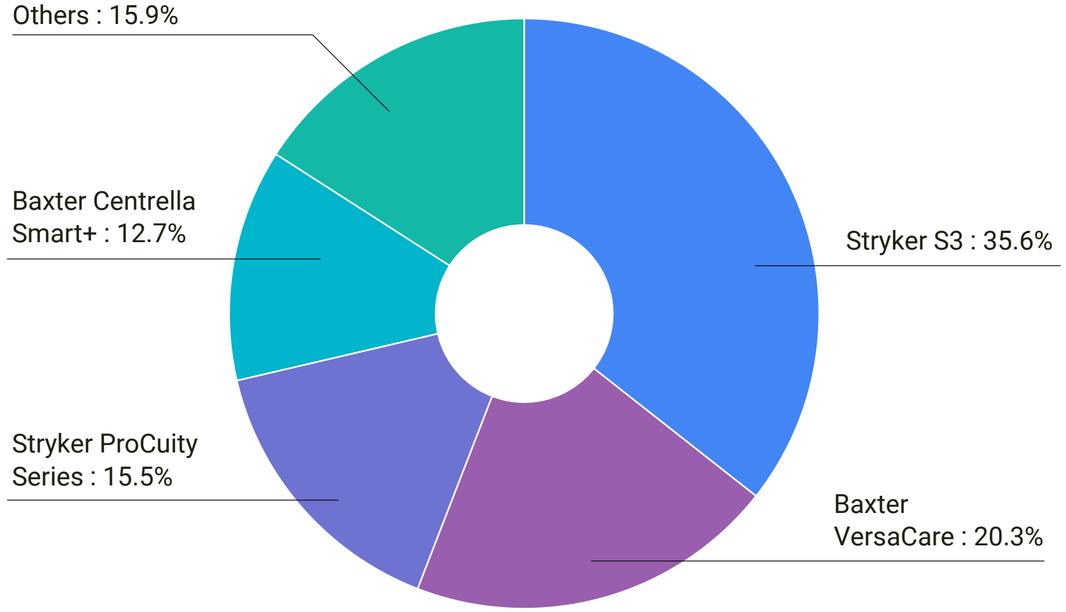
Note: This is not intended to represent all manufacturers and models, or the entire U.S. market, but demonstrate the mix seen in HANDLE's dataset.

Med Surg Bed Model Share by Estimated Replacement Cost*



*HANDLE estimates replacement cost via federated data on prices paid across all client ERP data feeds.

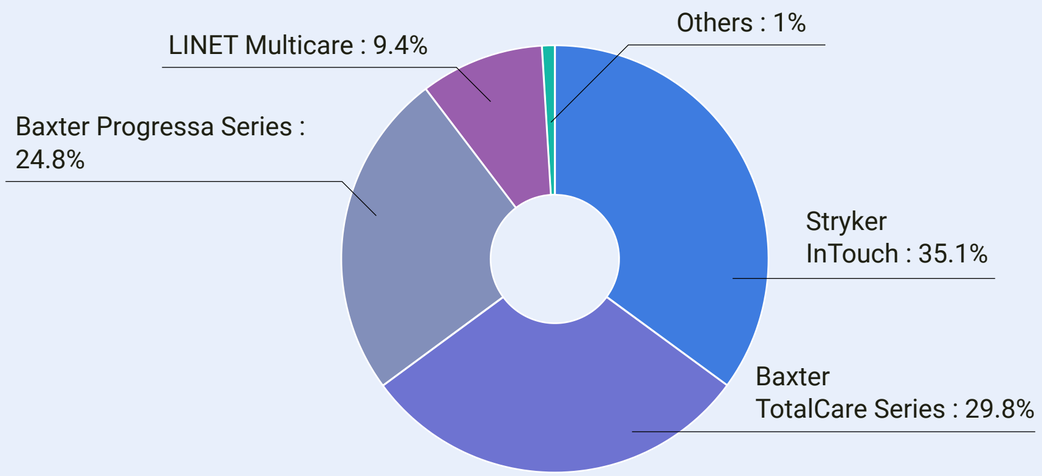
Med Surg Bed Model Share by Count



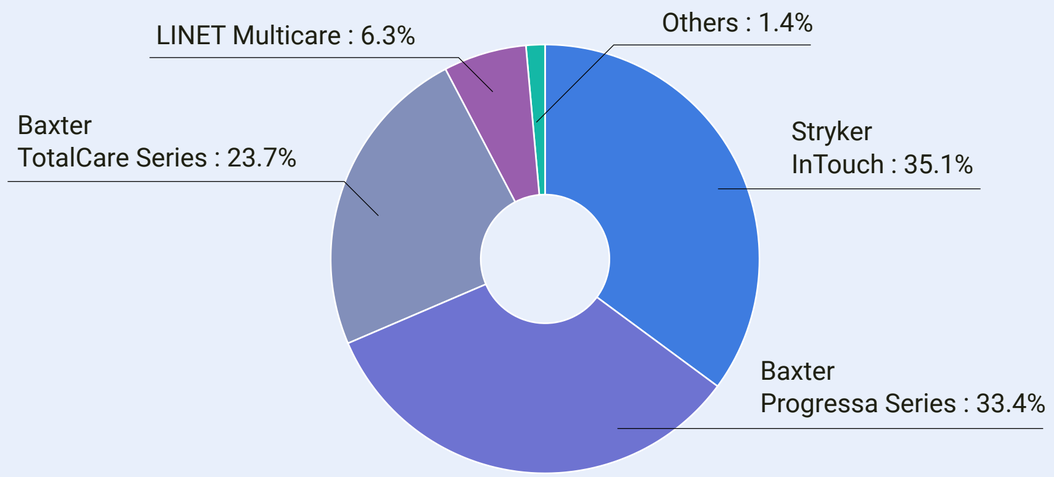
Hospital Bed Mix by Subcategory

The charts below show leading ICU Bed models by both estimated replacement cost and install base count, based on HANDLE's analysis of capital spend across U.S. hospitals.

ICU Bed Model Share by Estimated Replacement Cost*



ICU Bed Model Share by Count



Health System Professionals

Since Baxter TotalCare and Progressa seem to have more of the ICU bed share, Stryker may be willing to be aggressive on price and service to gain share with its InTouch model.

Medical Capital Suppliers

Fragmented purchasing across departments may present opportunities for suppliers to propose standardized solutions and increase share.

*HANDLE estimates replacement cost via federated data on price paid across all client ERP data feeds.

Median Observed Service Life at Disposition

HANDLE tracks dispositions across its database and therefore has live data on the service life seen across hospital bed models.

Across all models and clients, HANDLE sees hospitals typically disposing of Med Surg Beds after 11 years (median age at disposition) and ICU beds after 12 years.

The AHA lifespan is 12 years, similar to what HANDLE sees across its database. The AHA bases its lifespan guidelines in part based on the innovation velocity and quality seen in the category. Maintaining a bed for significantly longer may pose patient quality and obsolescence risks.

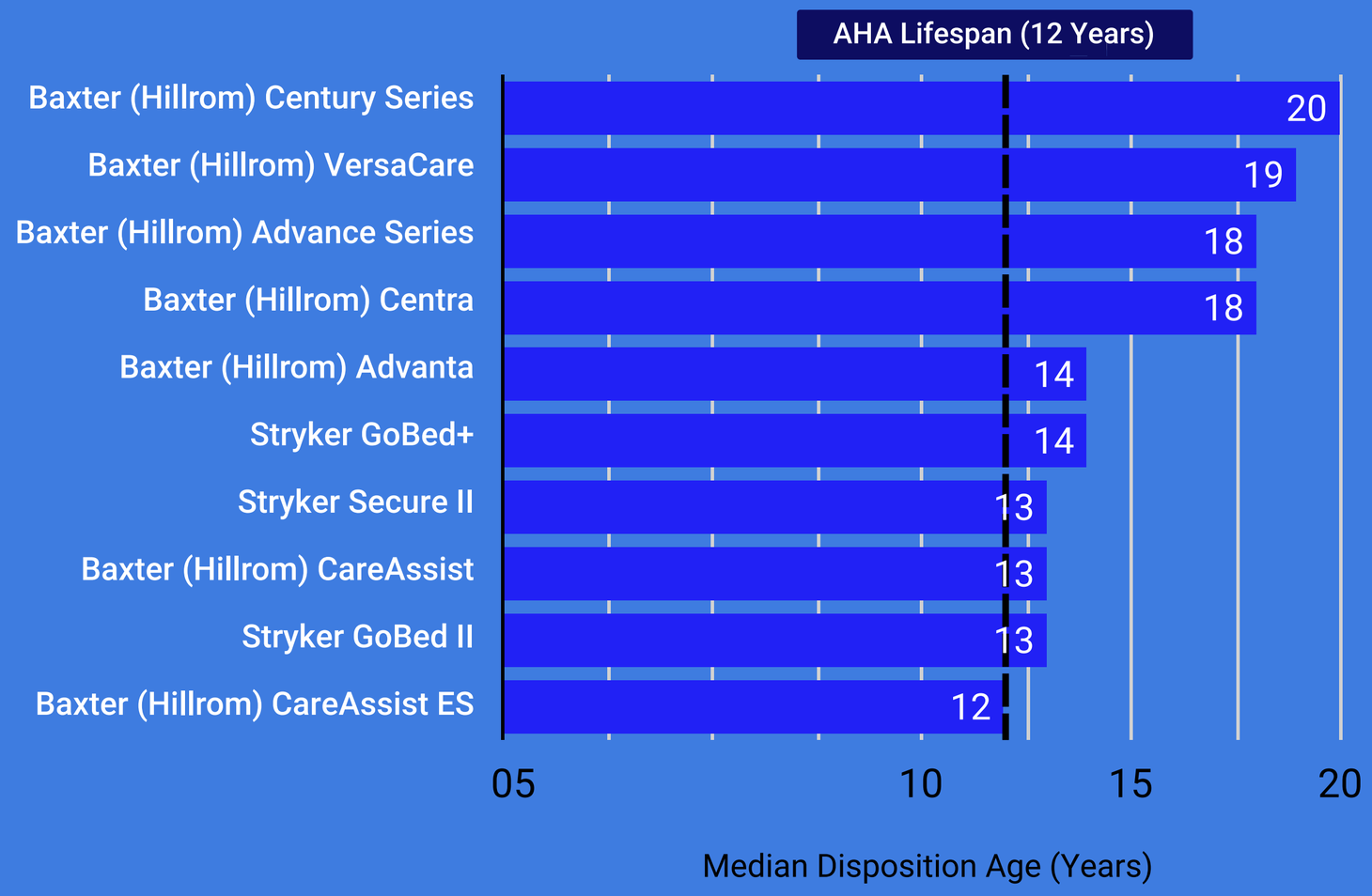
Health System Professionals

How does your fleet compare? Do you have opportunities to stretch your own fleet, or does this support replacement plans?

Medical Capital Suppliers

In a category with increasing innovation, durability continues to be paramount.

Median Observed Disposition Age by Model vs. AHA Estimate



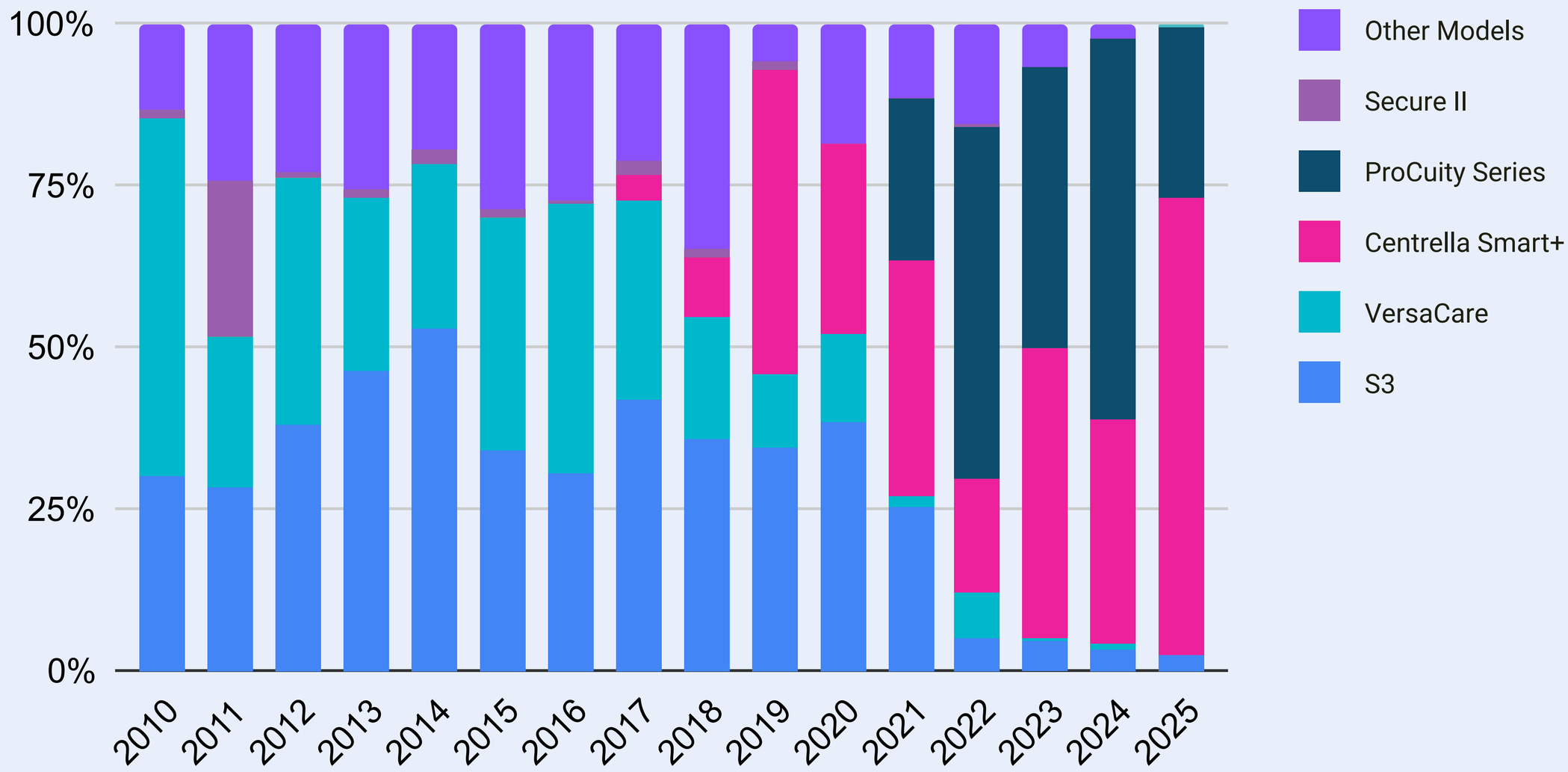
Model Share Over Time

Whether you're a health system sourcing professional identifying the latest industry standard in a category, or a supplier identifying the latest go-to model and features, the below charts demonstrate how the prevalent hospital bed models in HANDLE's database have changed over time.

The Baxter Centrella Smart+ has dominated the share of purchase in recent years, potentially owing to its combination of smart technology, patient safety features, and versatility.

While the Stryker S3 held dominant share for many years, Centrella Smart+ has accelerated Baxter market share capture when the portfolio moved from VersaCare to the Centrella Smart+ model.

Med Surg Bed Model Share Purchased by Year

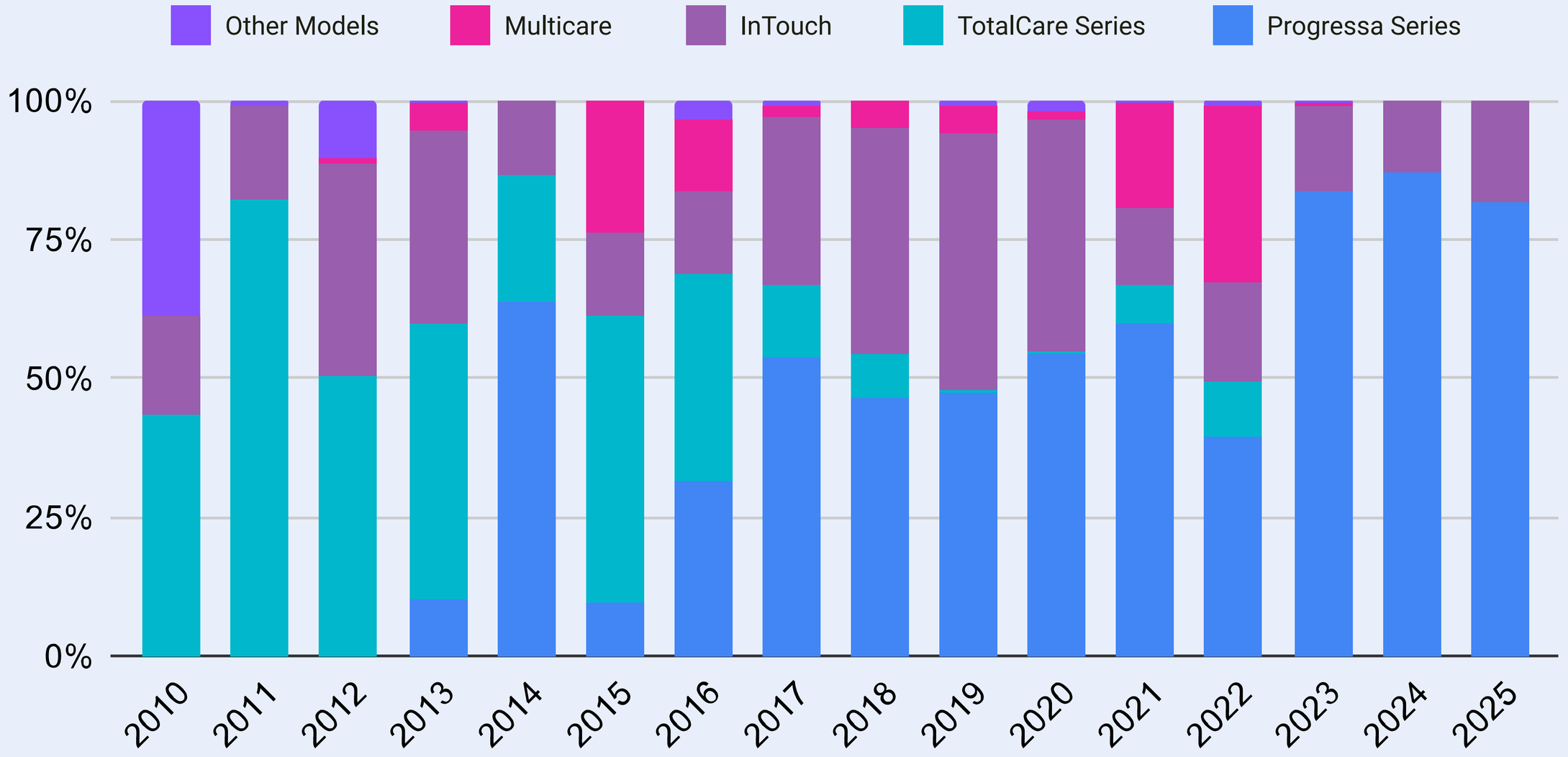


Model Share Over Time

The Baxter Progressa Series has taken the majority share of recent ICU bed purchases in HANDLE's database after evolving its portfolio from the TotalCare Series in the mid-2010s. While Stryker's InTouch held consistent share until approximately 2020, Baxter has taken increasing share in recent years among purchases in HANDLE's database.

As a health system stakeholder, this means Stryker may be more willing to negotiate to maintain share in this category.

ICU Bed Model Share Purchased by Year



Med Surg Bed Detailed Model Comparison

	 Stryker ProCuity Series	 Stryker S3	 Baxter VersaCare	 Baxter Centrella Smart+
Available for Sale / Rental?	Available new and refurbished	Available new and refurbished	Refurbished and rental	Available new and refurbished
Key Features	L: Standard model with manual brakes. LE: Adds electric brakes and USB outlet. Z: Includes LE features plus Zoom Motorized Drive and a higher low height. ZM: Adds powered mattress integration and a premium screen.	Adjustable siderails, iBed wireless alert system, flexibility / adaptability for support and traction systems; StayPut frame technology.	Advanced Microclimate Management, Auto Contour, Boost feature, three-mode bed exit alarm	SafeView+ visual projections to read patient status, continuous patient monitoring, and WatchCare system for incontinence management.
Market Position	L is the most standard option, while the LE, Z, and ZM each become more premium, respectively.	Newer model, known for advanced technology and safety features	Known for advanced wound care features and low bed height	Popular for advanced patient monitoring features and display capabilities
Dimensions	L / LE models - Width: 42” (106.7 cm) Length: 104.25” (264.8 cm) extended Z/ZM models - Width: 42” (106.7 cm) Length: 107” (271.8 cm) extended	Width: 41.5” (105.41 cm) Length: 93” (236.22 cm) (siderails up)	Width: 40” (102 cm) Length: 94.5” (240 cm)	Width: 40” (101.6 cm) Length: 98.7” (251 cm)
Electrical Needs	120 VAC, 60 Hz, 8A	115 VAC, 60 Hz, 8 A; optional 110 VAC, 60 Hz, 10 A	Standard power outlet, battery backup	Standard power outlet, battery backup
Portability	6 in (15.2cm) casters for easier movement. Z/ZM models include Zoom Motorized Drive	Four-wheel steel brake with swivel lock system, 6-inch casters	Optional IntelliDrive powered transport system and FlexAfoot retraction mechanism (11 in)	IntelliDrive powered transport and 5-inch casters with central locking system
Weight Capacity	550 lbs (249.5 kg)	500 lbs (227 kg)	500 lbs (227 kg)	500 lbs (227 kg)

CAPITAL COMPASS: DATA-DRIVEN INSIGHTS INTO HOSPITAL BEDS

The predominant models include advanced patient monitoring, incontinence management, and powered adjustment and transport options.

ICU Bed Detailed Model Comparison

Stryker InTouch Series

Baxter TotalCare Series

Baxter Progressa Series

Available for Sale / Rental?	Refurbished only	Refurbished and rental	Available new, rented, and refurbished
Key Features	One-touch electric brake, protocol reminders, spoken language translations, sound therapy. Includes iBed monitoring compatibility.	Rotation mode for pulmonary complications, patient exit alarm, powered adjustment, FlexAFoot retractable foot control	Smart+ includes in-bed movement, proning accessory, incontinence management, and patient monitoring capabilities.
Market Position	Simplified for critical care settings, but includes advanced monitoring features.	Legacy Baxter ICU / critical care bed	Flagship ICU / critical care bed with advanced patient safety features
Dimensions	Width: 42” (106.7cm) Length: 90” (228.6cm)	Width: 36–44.5” (91–113 cm) Length: 93.5” (237.5 cm)	Width: 40.5” (103cm) Length: 88” (223.5cm)
Electrical Needs	120 VAC, 9.8A, 50/60 Hz	Standard power outlet	Standard power outlet
Portability	Motorized Zoom Drive system	IntelliDrive powered transport with TotalCare Bed System for less force to move patient	IntelliDrive powered transport
Weight Capacity	550 lbs (249.5 kg)	500 lbs (227 kg)	500 lbs (227 kg)

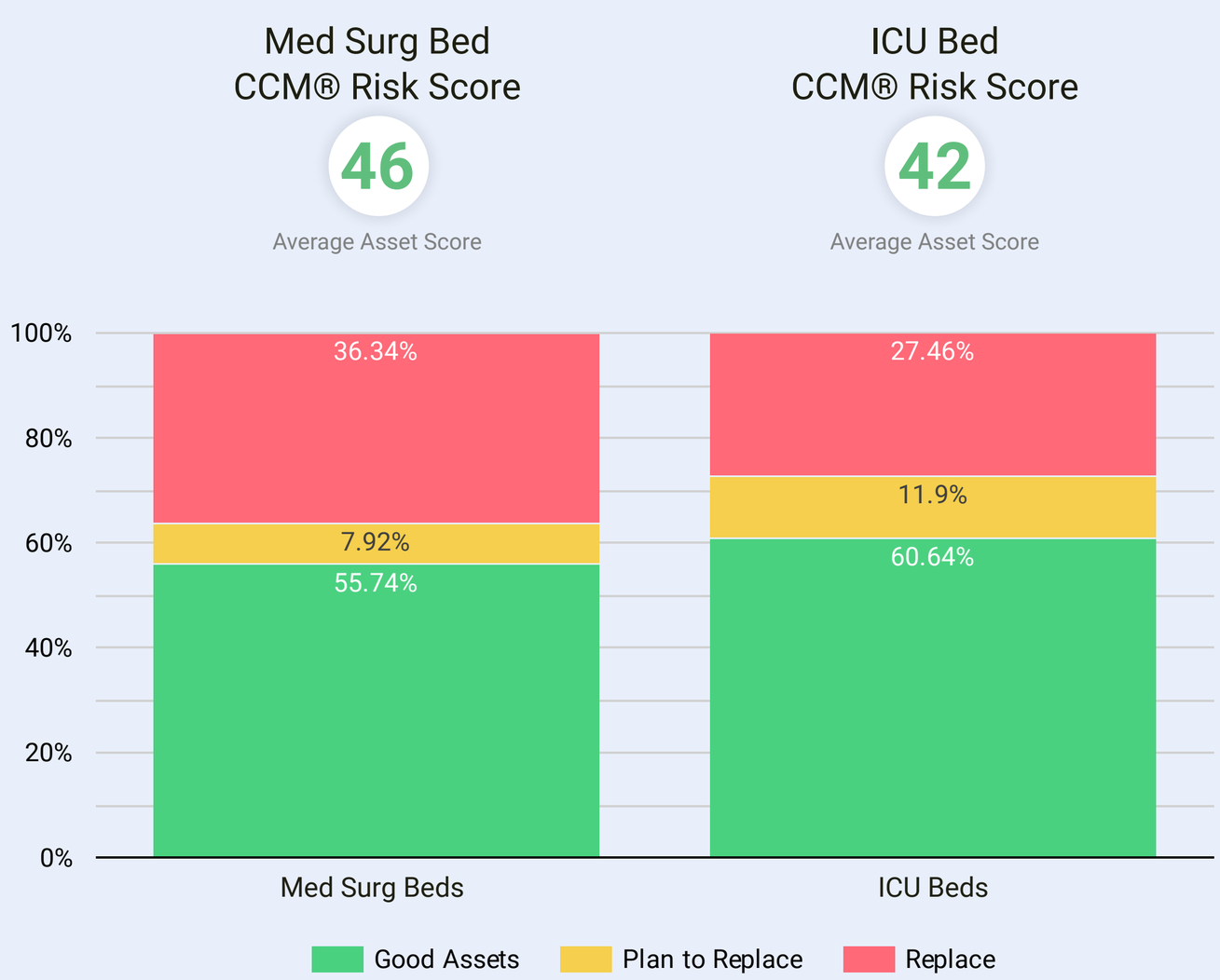
Baseline features for ICU beds include advanced patient monitoring features to ensure that when clinical conditions change, staff are promptly notified given the acute nature of patients using these beds.

Hospital Bed Fleet Aging

HANDLE applies its proprietary CCM® risk score to every asset in its database. This enables our health system clients to prioritize assets for replacement across facilities and product categories. This scoring places assets into three aging categories:

- **Risk Score 0-60, “Good”:** Asset does not need replacement. Barring other factors that contribute to the risk score, this typically indicates the asset is more than 2 years away from end of useful life.
- **Risk Score 60-80, “Plan to Replace”:** Asset is nearing the end of useful life or at-risk due to other factors, potentially including cybersecurity risk or recalls seen in similar products.
- **Risk Score 80+, “Replace”:** Asset is at the end of its useful life, has major cybersecurity risks, or has other factors indicating it should be replaced.

Hospital Bed Fleet Replacement Status



Health System Professionals

How does your fleet compare? While many of our health system clients keep assets beyond useful life, there is typically an “acceptable” level of obsolescence.

Additionally, notice that most health systems have a relatively younger ICU Bed fleet than Med Surg fleet given the clinical criticality of the ICU fleet.

Medical Capital Suppliers

Focus on the obsolete bed assets that may truly require replacement, but also try to identify which of the “Plan to Replace” category your customer may be considering.

Proactively bring solutions for fleet replacement rather than waiting for equipment to wear out.

Hospital Bed Purchasing Guide

Before purchasing any hospital bed, the potential buyer should assess their needs against the features and costs of any system. Contact your local sales representatives for specific considerations.

When upgrading your hospital bed fleet or purchasing a new hospital bed, it’s important to know what kinds of questions to ask and what types of information you should expect vendors to provide in return. Below are potential questions and hypothetical best-in-class answers to expect during the purchasing process.

Total Cost of Ownership

Question: What is the expected annual service and maintenance cost (parts and labor) over the bed’s life?

Hypothetical Answer: Our service contract is $450 per bed per year and includes all parts and labor. Over the expected 12-year life of the bed, that totals $5,400 per unit. We also offer multi-year discounts and uptime guarantees. Our service response time averages under 24 hours in most regions.

Question: What are the most common failure points and associated replacement part costs after year 1?

Hypothetical Answer: After year one, typical components requiring replacement include the brake system and electronic modules. Our data show failure rates of 8-10% by year 5. We proactively stock these parts in regional depots. Replacement costs average $150-$300 per incident, and preventive maintenance reduces incidence by 40%.

Clinical Outcomes & Safety

Question: How does this model reduce patient falls and pressure injuries compared to legacy models?

Hypothetical Answer: This model includes integrated bed-exit alarms with 3-zone sensitivity, auto-low height positioning, and pressure redistribution surfaces. In clinical studies across 4 health systems, we saw a 28% reduction in falls and 35% fewer pressure injuries compared to legacy beds. These findings were independently validated and contributed to a 0.7-day reduction in average length of stay for at-risk patients.

Operational Efficiency

Question: How does this bed model reduce time spent on transport, cleaning, and bed readiness?

Hypothetical Answer: This model is 30% lighter than standard med-surg beds, includes powered drive assist for transport, and features tool-free disassembly for rapid cleaning. Our customers report a 20–25% reduction in transport time and 30% faster room turnover. Visual status indicators (e.g., brake engaged, bed clean/dirty) integrate with EVS dashboards to streamline bed readiness.

Hospital Bed Purchasing Guide

Technology & Integration

Question: What data or analytics does this bed offer to support nursing workflow and safety monitoring?

Hypothetical Answer: Our smart bed platform captures and transmits data on patient positioning, mobility events, bed-exit alerts, and side-rail status to the EMR or nurse call system. This enables real-time safety monitoring and helps reduce alarm fatigue. One customer reported a 22% reduction in response time to bed-exit alarms within six months of implementation.

Question: How does this bed integrate with our existing clinical systems (e.g., nurse call, EMR, RTLS)?

Hypothetical Answer: Our bed platform supports standard HL7 and FHIR protocols, allowing seamless integration with Epic, Cerner, and most major nurse call and RTLS systems. We offer out-of-the-box integrations for bed status, brake alerts, and patient mobility events. Our integration team works directly with your IT department to validate connectivity and ensure security compliance (HIPAA, HITRUST).

Service Support

Question: What kind of service coverage, response times, and escalation support can we expect post-purchase?

Hypothetical Answer: We provide 24/7 technical support and guarantee on-site service within 24 hours in 95% of metro areas. All technicians are OEM-trained. Each account is assigned a dedicated service manager, and we offer quarterly performance reviews. Emergency escalations receive a response within 1 hour. We also provide real-time ticket tracking via your customer portal.

HANDLE®

For Hospitals:

Optimize your capital equipment management and stay ahead of industry trends. Speak directly with David Newton, Senior Vice President of Customer Success and Product, to discover how HANDLE's team of category experts can enhance your hospital's operational efficiency.

↳ **david.newton@handleglobal.com**

For Suppliers:

Expand your market reach and forge strategic health system partnerships in the evolving medical equipment landscape. Connect with our VP of Partnerships, Trevor Johnson, to explore collaboration opportunities with HANDLE.

↳ **trevor.johnson@handleglobal.com**