



REHABILITATION SECTOR IN UKRAINE

THE REHABILITATION SERVICES MARKET

AT A GLANCE: MARKET SNAPSHOT



Ukraine's **Rehabilitation Services Market** is a **multi-channel market**, with the participation of public institutions, private providers, insurers, manufacturers, importers, NGOs, and international donors. It is impacted by a **multi-tiered regulatory framework** involving national, regional, and local authorities, each playing distinct roles within the market.



Rehabilitation Service Providers: Represented by different types of providers, including state-owned, communal, and private providers. The majority of services are procured through the state-funded PMG by the single payer – the National Health Service of Ukraine (NHSU) operating an annual budget of \$4B+ (**\$171M for medical rehabilitation**).



Public hospitals dominate by scale but are slow to modernize; private networks are nimble and influential in setting new standards; insurers shape patient flows through voluntary health insurance coverage; domestic manufacturers are innovating in niches such as bionics; **importers remain indispensable for market entry**; and NGOs provide donor-funded pilot platforms.



Social Service Providers: Occupy a separate part of the market that provide a variety of rehabilitation services (e.g., day care; day care for children with disabilities; palliative care; and social and psychological rehabilitation).



Health Financing Reforms: Since 2017, Ukraine has pursued health financing reforms to improve access and reduce out-of-pocket costs. However, out-of-pocket payments remain significant, especially for goods (medicines, devices).



National Government Stakeholders: Key governmental bodies include Parliament, the Cabinet of Ministers, Ministries of Health; Social Policy; Education and Science; Youth, and Sports; and Veterans Affairs, the NHSU, and the National Security and Defense Council.



Alignment with EU Standards: Ongoing legal harmonization with EU norms and regulations is simplifying entry for international companies and promoting joint ventures, especially with EU-based partners.

Rehabilitation Services By The Numbers

549

Healthcare Providers Contracted for Rehabilitation Services (2025)

437K+

Total Rehabilitation Services Provided (Estimated for 2025)

3.9K+

Number of Social Service Providers

81%

Healthcare Facilities with Rehabilitation Units

MARKET TRENDS & OPPORTUNITIES

Ongoing war is driving higher demand for rehabilitation services, especially for complex injuries. Chronic disease care needs are rising as the population ages. The sector is diversifying, with growth in both public and private services, and a shift toward home-based care and tele-rehabilitation.

- **Integrated Rehabilitation Centers:** U.S. firms can partner locally to build modern, tech-enabled rehabilitation centers for war injuries and chronic care.
- **Tele-rehabilitation & Digital Health:** Strong demand for remote care and Ukraine's IT expertise create opportunities for U.S. companies in virtual therapy, remote patient monitoring, and mobile rehabilitation apps.
- **Digital Patient Management:** U.S. health-tech firms can offer patient management software and home-care platforms as integrated, digital solutions gain traction.
- **Insurance Innovation:** There is an unmet need for customized insurance products for military and civilian rehabilitation, including limb loss and long-term care; U.S. insurers can fill this gap.
- **Public-Private Partnerships:** New laws encourage PPPs, allowing U.S. firms to help upgrade public rehabilitation infrastructure, supply advanced equipment, and deliver training for rehabilitation professionals.