

Surgical Wound Closure Devices Market - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Surgical Wound Closure Devices Market Report

The global surgical wound closure devices market by revenue is expected to grow at a CAGR of approx. 6% during the period 2021–2026.

The wound closure devices market has been adversely affected since the breakout of the COVID-19 pandemic. Over 28 million planned surgeries across the world have been canceled due to the outbreak of the pandemic, which has significantly truncated the growth of wound closure devices. Majority of hospitals worldwide either postponed or canceled their planned elective surgeries during the pandemic, which has severely affected the application of advanced wound closure devices. With developed countries such as the US, Germany, and the UK suspending elective, specialty, and other surgeries to avoid exposure to the potential infection environment and to prioritize the treatment of COVID-19, the revenue of the global market has nosedived. Further, the utilization of surgical procedures with surgical wound closure devices declined in 2020 as the number of procedures decreased in the short term, hence, delaying new purchases of wound closure devices.

The following factors are likely to contribute to the growth of the surgical wound closure devices market during the forecast period:

The shift toward Non-invasive Wound Closure Devices

Introduction of Next Generation Wound Closure Devices

Increase in Non-essential Surgeries

Increasing Popularity of Natural Surgical Sealants

The study considers the present scenario of the surgical wound closure devices market and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Surgical Wound Closure Devices Market Segmentation

The global surgical wound closure devices market research report includes a detailed segmentation by product, end-user, patient group, geography. In 2020, surgical sutures and needles accounted for over 41% of the global surgical wound closure devices market share. With the increase in surgeries conducted across the globe, the demand for sutures is increasing. Despite the availability of substitutes such as staples, glues, and strips, the demand for suture materials is growing. The introduction of antimicrobial wound dressing is also likely to influence market growth. Surgical stapling devices are of crucial importance as they help to maintain hemostasis, prevent leakage, and preserve vascularization. These devices are increasingly preferred as they heal wounds quickly, offer minimal tissue reaction, and involve low infection risk. While sutures and needles dominate the market, the application of adhesives and sealants is growing on account of high performance and reduced infection risks. Sealant and adhesives are expected to grow at a CAGR of over 7% during the period 2020-2026. Sealants or bio-adhesives are considered a promising substitute to sutures, staples. Their physical, biological properties and adhesive strength have encouraged several surgeons to employ them in clinical practices, thereby growing market opportunities.

Hospitals in developing and developed countries perform the majority of surgeries. Due to the rise in the geriatric population, the number of surgeries performed in hospitals is also growing. Most hospitals prefer the use of advanced wound closure devices to help patients recover quickly. Surgical staplers and advanced absorbable sutures are witnessing high adoption in hospitals. Furthermore, antimicrobial sutures are also being widely used in hospitals to avoid post-operative complications surgeries and prevent surgical site infections (SSI) as these infections accounted for a high percentage of deaths. The outbreak of the COVID-19 pandemic has led to the postponement of elective surgeries in hospitals, especially in developed countries. Hence, the pandemic

has a considerable effect on the global surgical wound closure devices market.

Adults dominate the wound closure devices market as a significant proportion of the human population undergoes surgical procedures at a point in life. The segment is expected to grow as adults are more susceptible to accidents, mishaps, and diseases. North America and Europe are expected to contribute maximum revenues due to the high number of surgeries carried out in these regions. However, with the outbreak of the covid-19 pandemic, the number of elective surgeries in the US and Canada has been deferred. Europe is another high-revenue generating market as the region witnessing a high number of surgeries performed on the geriatric population and a high percentage of the population with morbidities such as diabetes. The pediatric segment accounted for over 23% of the share, however, there is a significant number of emergency surgeries performed in the pediatric group, sports injuries, congenital birth defects which account for the significant share of pediatric procedures, thereby increasing the demand for surgical wound closure devices in the market.

Product

Surgical Sutures

Surgical Stapling Devices

Surgical sealants and adhesives

Surgical Strips

End-user

Hospitals

Special Medical Facilities

Others

Patient Group

Adult

Pediatric

INSIGHTS BY GEOGRAPHY

North America accounted for a share of over 36% of the global surgical wound closure devices market in 2020. The number of surgeries performed in North America is growing due to developed healthcare infrastructure and an increase in the geriatric population, which has drastically increased the patient pool requiring effective treatment and surgical procedures. This, in turn, is expected to propel market growth. In addition, benefits such as no cut or incision on body parts, less or no blood loss, enhanced patient care, and overall improved patient experience associated with non-invasive procedures are expected to further spur the market growth. Also, chances of hospital-acquired infections are minimal with these types of surgeries. This has increased the demand for non-invasive procedures.

Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

India

Japan

South Korea

Australia

Latin America

Mexico

Brazil

Argentina

Middle East & Africa

Saudi Arabia

Turkey

South Africa

INSIGHTS BY VENDORS

The global market is subject to rapid changes and has been significantly affected by new product launches. Medtronic, Johnson & Johnson, 3M, and B. Braun Melsungen are major vendors in the industry. Currently, these companies together account for significant shares in the market. However, they are facing stiff competition from local and regional players. Several tier II and tier III companies, including several Asian companies, are posing a threat to key players as they offer antimicrobial dressing material at competitive prices. Global players are focusing on developing innovative products and expanding their product portfolio to remain competitive in the market.

Prominent Vendors

3M

Medtronic

B. Braun Melsungen

Johnson & Johnson

Other Prominent Vendors

Adhesys Medical

Baxter

BD

BSN Medical

Cardinal Health

Changzhou Haida Medical Equipment

Cohera Medical

CONMED

CryoLife

DermaRite

Farmaceutica International

Frankenman International

Grena

GPC Medical

Intuitive Surgical

Integra LifeSciences

HARTMANN

Meril Life Sciences

Medline

Ocular Therapeutix

ORION SUTURES

Pfizers Surgical

Purple Surgical

Reach Surgical

Sealantis

Smith+Nephew

Stryker

Teleflex

Waston Medical Appliance

Welfare Medical

KEY QUESTIONS ANSWERED

1. What is the market size of the surgical wound closure devices market during the period 2020-2026?
2. What impact the COVID-19 pandemic has on the growth of the surgical wound closure devices market?

3. Which region is likely to account for the largest share in the wound closure devices market by 2026?
4. What are the key growth strategies adopted by vendors in the surgical wound closure devices market?
5. Who are the key players in the surgical wound closure devices industry?

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