

Global Surgical Instrument Tracking Devices Market: Focus on Product Type, Technology, End User, 10 Countries' Data, and Competitive Landscape - Analysis and Forecast, 2021-2031

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Abstracts

Market Report Coverage - Surgical Instrument Tracking Devices

Market Segmentation

Technology: Barcode and Radio Frequency Identification Device (RFID)

Product Type: Hardware, Software, and Services

End Users: Hospitals, Ambulatory Surgical Centers, and Others

Region: North America, Europe, Asia-Pacific, and Rest-of-the-World

Regional Segmentation

North America: U.S. and Canada

Europe: Germany, France, Spain, U.K., Italy, and Rest-of-Europe

Asia-Pacific: China, Japan, Australia and New Zealand, and Rest-of-Asia-Pacific

Rest-of-the-World

Market Growth Drivers

Increasing need for inventory management and implementation of Unique Device Identification (UDI) regulations by the FDA inciting the use of surgical instrument tracking devices

Rising number of surgical procedures globally propels the demand for surgical instrument tracking devices

Availability of technologically advanced products offering more features in tracking devices

Factors like time pressure and infection faced by the hospital lead to a rise in demand for surgical instrument tracking devices

Market Challenges

Technological Limitations

Fall in elective surgeries across the globe during the COVID-19 pandemic impacted the market negatively

Market Opportunities

Rise in incidence cases of retained surgical instruments

Development and high demand of IoT in surgical instrument tracking devices

Key Surgical Instrument Tracking Devices Companies Profiled

ASANUS Medizintechnik GmbH, B Braun Melsungen AG, Becton, Dickinson and Company, FingerPrint Medical Limited, Fortive Corporation, Getinge AB, Haldor Advanced Technologies, Integra LifeSciences Holdings Corporation, Murata Manufacturing Co., Ltd., NuTrace, Scanlan International, SpaTrack Medical Limited, Stanley Black & Decker, Inc., Steris plc. and Xerafy Singapore Pte Ltd.

Key Questions Answered in this Report:

What is the current market size and future potential of surgical instrument tracking devices?

What is the current market share and growth share of the different surgical instrument tracking devices in the market?

What are the guidelines implemented by different government regulatory bodies to regulate the approval of the surgical instrument tracking devices in the market?

What are the major market drivers, restraints, and opportunities in the global surgical instrument tracking devices market?

What is the impact of the COVID-19 pandemic on the market?

Which technology is being researched and worked upon to improve the surgical instrument tracking devices technologies?

Who are the leading players dominating the global surgical instrument tracking devices market?

What are the key development and strategies incorporated by the players of the global surgical instrument tracking devices market to sustain the competition and retain their supremacy?

Which countries contribute to the major share of current demand, and which countries hold significant scope for expansion for business activities by players of the global surgical instrument tracking devices market?

Global Surgical Instrument Tracking Devices Market Overview

The surgical instrument tracking devices are a combination of tracking devices that are specially designed to be implemented on surgical instruments. Barcodes and radio frequency identification devices (RFIDs) are two types based on technology. By product type, surgical instrument tracking devices can be categorized into hardware, software, and services. Surgical instrument tracking devices are currently dominated by RFIDs

and hardware. These systems are focused on the idea of having more information than just the location of surgical instruments, which is an important factor in surgical instrument asset management. Due to the growing concerns regarding patient safety, the government and healthcare regulatory bodies have made the implementation of tracking devices on surgical instruments mandatory in hospitals and surgical ambulatory centers. Adoption of these devices has been seen in recent years to save a lot of manpower and resources, which has aided hospital inventory management and boosted the surgical instrument tracking devices market.

The surgical instrument tracking devices market report highlights that the radio frequency identification device (RFID) market was valued at \$283.4 million in 2020 and is expected to reach \$685.9 million by the end of 2031. The market for RFID is anticipated to grow at a CAGR of 9.0% during the forecast period 2021-2031.

Global Surgical Instrument Tracking Devices Market Dynamics

Patient safety and resource management are top priorities in healthcare practice. Doctors, nurses, administrators, and staff work to strengthen them every day. Furthermore, even the most experienced practitioners are susceptible to human error. Patient safety has vastly improved in recent decades, owing in large part to advancements in technology.

It is no secret that hospitals often handle millions of dollars in assets, making inventory management of the surgical assets a time-consuming and laborious task. To ensure patient safety and quality of care, most healthcare providers rely heavily on surgical instrument tracking devices technology.

Presently, the factors driving the growth of the market as per the surgical instrument tracking devices market report include increasing need for inventory management and implementation of unique device identification (UDI) regulations by the FDA inciting the use of surgical instrument tracking devices, rising number of surgical procedures globally propels the demand for surgical instrument tracking devices. Also, the availability of technologically advanced products offering more features in tracking devices and factors like time pressure and infections faced by the hospital lead to a rise in demand for surgical instrument tracking devices.

All the surgical instrument tracking devices, such as barcode and radio frequency identification devices (RFID), are based on features like temperature resistance, heavy chemical resistance, resistance from heavy metal and liquids, and resistance to other

harsh environments. While RFIDs and barcodes offer a variety of benefits to end users, such as providing real-time location and a wealth of other data, this technology faces a number of challenges, especially in the workplace, where devices must withstand harsh conditions. Aside from these technological issues, the COVID-19 pandemic has had a negative impact on the market by causing delays in elective procedures all over the world.

The challenges that are restricting the growth of the market include technological limitations and a fall in elective surgeries across the globe during the COVID-19 pandemic, which impacted the market negatively.

With developments in instrument tracking technology and their implementation in the healthcare field, the surgical instrument tracking devices market provides numerous tremendous opportunities. The correct evidence-based methodology, quantitative evaluation, and high-value technology would transform market dynamics by integrating emergent innovations into established products.

The surgical instrument tracking devices market could benefit from an increase in the number of cases of retained surgical instruments, as well as the growth and high demand for IoT in surgical instrument tracking devices.

Impact of COVID-19 on the Global Surgical Instrument Tracking Devices Market

The impact of the COVID-19 pandemic on economies and societies across the globe cannot be undermined. COVID-19 has impacted elective surgeries and procedures around the globe, which have negatively impacted the surgical instrument tracking devices market. The pandemic created backlogs for elective procedures leading to a decline in the need for surgical instrument tracking devices.

The COVID-19 pandemic has adversely impacted the business development and deployment activities of surgical instrument tracking devices products manufacturers. Engineers and experts are not able to begin the manufacturing of advanced chips, among other products, in specific countries such as South Korea. Many of the potential business partners are unable to make on-site visits to facilities or industry conferences for experience and trials of the various newly developed data science and surgical planning systems. The external labs affected by COVID-19 are experiencing delays in obtaining regulatory approval, thus increasing operating expenses. COVID-19 has also resulted in shutdowns or disruptions of business for many companies' manufactures and suppliers.

The long-term effect of the COVID-19 pandemic on the activities of companies or their third-party partners, on the other hand, would be largely determined by future developments and the resumption of normal business operations, all of which are highly uncertain.

Market Segmentation

Global Surgical Instrument Tracking Devices Market (by Technology)

Different technologies that are studied and analyzed under surgical instrument tracking devices market report include barcode and radio frequency identification device (RFID).

Radio frequency identification device (RFID) generates the highest revenue in the surgical instrument tracking devices market, and barcode is expected to rise at a faster pace between 2021 and 2031. This is mostly due to a rise in barcode adoption due to lower prices and being user-friendly.

Global Surgical Instrument Tracking Devices Market (by Product Type)

Different product types that are studied and analyzed under surgical instrument tracking devices market report include hardware, software, and services.

In the surgical instrument tracking devices market, the hardware segment generates the most revenue, while the software segment is projected to expand at the fastest rate during the forecast period 2021-2031. This is primarily due to a transition in hospital and ambulatory care centers toward digitalization and improved inventory management, necessitating the use of programs/tools that provide easily readable information.

Global Surgical Instrument Tracking Devices Market (by Region)

The different regions covered under the surgical instrument tracking devices market report include North America, Europe, Asia-Pacific, and Rest-of-the-World.

North America dominated the global surgical instrument tracking devices market in 2020 and is anticipated to uphold its dominance throughout the forecast period. The growth in the market is majorly driven by the increasing adoption of surgical instrument tracking devices after several cases of retained “foreign bodies” were reported across the globe. It is mandatory in several countries to implement surgical instrument tracking

devices for patient's safety during an operative procedure. Also, the ongoing trend for digital transformation is putting a significant impact on the market growth.

Key Market Players and Competition Synopsis

Some of the key players operating in the market include Steris plc., Stanley Black & Decker, Becton, Dickinson and Company, B. Braun Melsungen AG, Fortive Corporation, Getinge AB, Murata Manufacturing Co., Ltd, Integra LifeSciences Holdings Corporation, ASANUS Medizintechnik GmbH, FingerPrint Medical Limited, among others.

The surgical instrument tracking devices market has witnessed several strategic and technological developments in the past few years undertaken by the different market players to attain their respective market shares in this emerging domain. Some of the strategies covered in this segment are product offerings and upgradation, partnerships, alliances and business expansions, mergers and acquisitions, funding activities, and regulatory and legal activities. The preferred strategy for companies has been product offerings and upgradation.

Key Highlights

According to the global surgical instrument tracking devices market report, radio frequency identification device (RFID) is dominating the market in 2020 when compared to barcode under the segmentation – by technology. RFID is forecasted to uphold this position in the market and continue to dominate during the forecast period 2021-2031.

In terms of product type segmentation, hardware is the market leader, led by software. During the forecasted period 2021-2031, hardware is projected to lead the market. Software is projected to rise at a faster pace than hardware, with a CAGR of 10.1%.

When the overall market contribution is considered, RFID accounts for 80% of the total market, whereas hardware leads by 47.2%.

Surgical instrument tracking devices hold the highest numbers in the North America region followed by Europe. The U.S. leads the table by contributing 59.8% of the total market in 2020. It is expected that the U.S. will maintain its position in the region-based segmentation.

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