

Medical and Surgical Drainage System Market - A Global and Regional Analysis: Focus on Product Type, Application, Flow Type, Material Type, and Country Analysis - Analysis and Forecast, 2023-2027

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Abstracts

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Intro to the Medical and Surgical Drainage System Market

The global medical and surgical drainage system market was valued at \$2,468.7 million in 2022 and is expected to reach \$3,073.4 million by 2027, growing at a CAGR of 4.86% between 2023 and 2027. The key factors driving the growth of the global medical and surgical drainage systems market include the increase in surgery volume globally, technological advancements in the medical and surgical drainage systems market, and the rise in the geriatric population.

Market Introduction

Drainage systems are medical devices that are used to remove excess fluids from the body, such as blood from a surgical site or wound. These devices are generally used by surgeons during surgical procedures to help prevent the accumulation of fluids, which may affect the healing process or lead to complications such as infections or hematoma formation. Surgical drainage systems are used for the management of post-operative fluid accumulation, thereby facilitating wound healing.

Impact

The medical and surgical drainage systems market has made an impact in the following

ways:

Patient Recovery: The drainage systems are used post-surgery or in the treatment of certain medical conditions to remove excess fluids or air from the body. This promotes faster patient recovery by reducing the risk of complications and discomfort.

Infection Prevention: Closed medical drainage systems help prevent infection by keeping bodily fluids isolated from the external environment. This is crucial in surgical settings, where infection control is of paramount importance.

Enhanced Surgical Procedures: Surgeons often use drainage systems during surgeries to maintain a clear surgical field. This improves the precision and safety of surgical procedures, particularly in complex cases.

Pain Management: Drainage systems are used to alleviate pain and discomfort in patients with conditions such as pleural effusion (fluid accumulation around the lungs) or ascites (fluid accumulation in the abdomen). By draining excess fluid, patients experience relief from pain and pressure.

Reduced Hospital Stay: Effective wound drainage can shorten the length of hospital stays for patients recovering from surgery or managing certain medical conditions. This can lead to cost savings for healthcare facilities and improve patient comfort.

Management of Chronic Conditions: Some chronic medical conditions, such as hydrocephalus (excess cerebrospinal fluid in the brain), require long-term drainage solutions. The medical and surgical drainage systems market provides ongoing care for patients with chronic conditions, improving their quality of life.

Minimally Invasive Procedures: Advances in drainage technology have enabled minimally invasive procedures, such as laparoscopic or percutaneous drainage. These techniques reduce the invasiveness of treatments and promote faster recovery.

Customized Solutions: The medical and surgical drainage systems market offers a range of drainage devices and systems tailored to specific medical conditions, allowing healthcare providers to select the most appropriate solution for their patients.

Impact of COVID-19

The COVID-19 pandemic has exerted a multifaceted influence on wound and surgical

drainage systems within the healthcare landscape. One of the most immediate effects was disruptions in the supply chain. The global healthcare supply chain faced unprecedented challenges, which led to shortages of important medical supplies, including drainage systems. Hospitals and healthcare facilities had a hard time getting these essential items, which could have potentially affected the quality of patient care and surgical outcomes. Moreover, the pandemic accelerated research and development efforts in various medical fields, including wound care and surgical drainage systems.

Market Segmentation:

Segmentation 1: by Product Type

Drainage Systems

Open

Closed

Accessories

Drainage Systems to Dominate the Global Medical and Surgical Drainage System Market (by Product Type)

Drainage Systems: Drainage systems play a vital role in healthcare, covering a wide range of tools and methods designed to manage the removal of fluids or substances from the body. These systems are incredibly important in medical settings, where they help speed up healing, prevent complications, and ensure patient comfort.

Open: Open drains, which can be made from materials such as corrugated rubber or plastic sheets, serve as essential tools for draining fluids from specific areas, such as surgical sites or wounds.

Closed: Closed drainage systems comprise tubes that direct fluids into a sealed bag or bottle. These systems are widely used in a range of medical contexts, including chest, abdominal, and orthopedic surgeries.

Accessories: In medical procedures involving drainage systems, several accessories

are employed to ensure effective fluid management and patient well-being. These accessories encompass drainage bags for collecting fluids, flexible tubing for fluid transport, absorbent dressings to safeguard and direct fluids, clamps or connectors for fluid control, and skin barriers to protect the skin and maintain a secure seal.

Segmentation 2: by Application

Cardiac and Thoracic Surgery

Abdominal

Orthopedic

Others Surgeries

Cardiac and Thoracic Surgery to Register Maximum Growth Rate in the Global Medical and Surgical Drainage Systems Market (by Application)

Cardiac and Thoracic Surgery: Cardiac and thoracic surgery is a specialized field of medicine that deals with procedures involving the heart and the chest area. After these surgeries, there's a standard post-operative practice where patients usually have pleural and/or mediastinal chest drains placed.

Abdominal: Abdominal drainage, also known as abdominal surgical drainage or abdominal wound drainage, is a medical procedure used to remove excess fluids, blood, or pus from the abdominal cavity following surgery or as a result of certain medical conditions. This drainage is crucial in preventing the accumulation of fluids, which can lead to complications such as infection, abscess formation, or impaired wound healing.

Orthopedic: Orthopedics is a medical field that specializes in taking care of your muscles, bones, and joints. Although drainage systems are more commonly associated with chest and abdominal surgeries, they are also relevant in orthopedic procedures, particularly those involving joint replacements.

Other Surgeries: The other surgeries include vascular procedures, neurosurgery, plastic surgery, and colorectal surgery, where drainage systems are commonly employed.

Segmentation 3: by Flow Type

Active

Passive

Active Segment to Dominate the Global Medical and Surgical Drainage Systems Market (by Flow Type)

Active: Active drains are essential tools in surgical and medical care. These drains function with the aid of suction, which can be either low or high pressure, to effectively remove fluids.

Passive: Passive drainage systems are vital components in surgical procedures, relying on the natural pressure difference between the inside of the body and the external environment to facilitate the flow of fluids out of the body.

Segmentation 4: by Material Type

Silastic

Rubber

Other Material

Silastic Segment to Dominate the Global Medical and Surgical Drainage Systems Market (by Material Type)

Silastic: Silastic drains, made from a biocompatible and inert material, cause minimal tissue reaction. These drains and medical devices are made from silicone rubber, a synthetic material known for its biocompatibility, flexibility, and inertness.

Rubber: Rubber drains, often referred to as surgical drains or drainage tubes, are medical devices used to remove fluids or air from the body following surgical procedures or in the treatment of certain medical conditions.

Other Material: The other material segment constitutes drains made up of materials

such as polyvinyl chloride (PVC), polyurethane, and stainless steel, among others. PVC is a thermoplastic polymer that is used in surgical drains and is known for its flexibility and durability, making it suitable for various surgical applications.

Segmentation 5: by Region

Americas

U.S.

Europe, Middle East and Africa (EMEA)

Germany

France

U.K.

APAC

China

India

Based on region, the U.S. dominated the global medical and surgical drainage systems market in terms of market size in FY2022. However, the China region, encompassing numerous emerging economies, is projected to exhibit a CAGR of 6.57% during the forecast period from 2023 to 2027.

Recent Developments in the Medical and Surgical Drainage Systems Market

In June 2023, Myra Vision secured \$25 million in Series B financing, led by Cormorant Asset Management, with contributions from the Capital Partnership (TCP), the PA MedTech VC Fund, and Shifamed angel investors. The funds would be used to advance product development, expand manufacturing, and support initial clinical trials of the Calibreye System.

In June 2021, Myra Vision, part of the Shifamed portfolio, completed its Series A

funding, securing \$17 million. These funds were allocated to expedite product development, enhance the company's infrastructure, and expand its team.

In July 2020, Nova Eye Medical Limited, a medical technology company dedicated to advancing ophthalmic treatment technologies and devices, concluded the acquisition of ophthalmic assets from Molteno Ophthalmic Limited (Molteno). This transaction included the exclusive Molteno3 glaucoma drainage device (GDD) platform.

In July 2019, Integra LifeSciences Holdings Corporation acquired Arkis Biosciences Inc., a private company that focuses on various medical devices for neurosurgery. One of its notable products is the CerebroFlo external ventricular drainage (EVD) catheter, which includes Endexo technology. This technology is designed to make the catheter less likely to get blocked by blood clots, enhancing its long-term effectiveness.

In September 2023, Merit Medical Systems introduced the Aspira Evacuated Drainage Bottle, bringing innovation to medical drainage solutions.

In August 2022, Merit Medical Systems unveiled the ReSolve Thoracostomy Tray, a significant addition to its medical product offerings.

In February 2022, IRRAS AB introduced the next-generation IRRASflow System in the U.S., marking a notable advancement in its medical technology portfolio.

In May 2022, Terumo India established a strategic distribution partnership with Argon Medical Devices, Inc., facilitating the distribution of Argon's products in the Indian market. This collaboration enhances Terumo's product offerings and presence in India.

In November 2022, IRRAS AB formed a commercial partnership with Medtronic plc in the U.S. Medtronic exclusively promotes the IRRASflow System in certain U.S. sales territories. This system allows neurosurgeons to actively manage intracranial pressure and cerebrospinal fluid drainage with controlled fluid exchange technology.

In August 2022, Bearpac Medical, LLC entered into a distribution agreement with APR Medtech, a U.K.-based company, to distribute its Passio pump drainage system.

In March 2022, IRRAS AB achieved a significant milestone by obtaining regulatory approval for its IRRASflow system in Australia. This approval would open new avenues for the adoption of innovative medical technology, further expanding its global reach and offering healthcare professionals in Australia a cutting-edge solution for managing intracranial pressure and cerebrospinal fluid drainage.

In April 2022, Bearpac Medical's Passio Pump Drainage System achieved CE Mark Certification, ensuring its compliance with European Union quality and safety standards. This certification would enhance its accessibility to healthcare providers and patients throughout Europe.

Demand – Drivers and Limitations

Market Demand Drivers:

Increasing Surgical Volume: The increasing volume of surgical procedures is a robust driver for the medical and surgical drainage systems market within the healthcare sector. This surge is primarily attributable to a combination of demographic shifts and evolving healthcare needs. As populations age and the prevalence of chronic diseases continues to grow, there is expected to be a greater demand for various surgical interventions, both elective and lifesaving. These surgeries span a wide range of specialties, from cardiovascular and orthopedic procedures to gastrointestinal and gynecological surgeries.

Technological Advancements in the Medical and Surgical Drainage Systems Market: Technological advancements play a pivotal role in driving growth within the medical and surgical drainage systems market. These innovations are transforming traditional drainage systems into sophisticated, high-performance solutions that enhance patient care, improve efficiency, and reduce the risk of complications.

Rising Geriatric Population: The increasing geriatric population serves as a significant driver for the medical and surgical drainage systems market. As the elderly population continues to grow, there is anticipated to be a heightened demand for healthcare solutions and medical devices that cater to their unique needs. According to data published in October 2020 by the World Health Organization (WHO) on “Ageing and Health,” by 2030, it has been projected that one in six people worldwide will be 60 years

or older, with their numbers increasing from 1 billion in 2020 to 1.4 billion in 2030.

Market Restraints:

Risk of Infections Associated with Drainage Systems: The risk of infection associated with drainage systems in healthcare settings is a significant concern. Drainage systems are designed to remove bodily fluids, waste, and other contaminants from patients, but they can also become sources of infection if not managed properly. One key factor contributing to this risk is the formation of biofilms within drainage pipes and containers over time.

Market Opportunities:

Increasing Opportunities in Emerging Economies: There is a growing opportunity for the surgical medical and surgical drainage systems market in emerging economies such as China, India, and Brazil, among others. These regions are characterized by expanding healthcare infrastructures, rising surgical intervention rates, increasing geriatric population, and an increasing focus on patient care, which leads to higher adoption of advanced drainage systems.

How Can This Report Add Value to an Organization?

Product/Innovation Strategy: The global medical and surgical drainage systems market has been extensively segmented based on various categories, such as products, applications, drainage types, material types, flow types, and regions. This can help readers get a clear overview of the segments accounting for the largest share and the ones that are well-positioned to grow in the coming years.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

Detailed secondary research was performed to ensure maximum coverage of manufacturers/suppliers operational in a country.

Exact revenue information, up to a certain extent, was extracted for each company from secondary sources and databases. The revenues specific to the product/type/application were then estimated for each market player based on fact-based proxy indicators as well as primary inputs.

The scope of this report has been carefully derived based on interactions with experts in different companies across the world. This report provides a market study of drainage systems and accessories.

The market contribution of the drainage systems and accessories anticipated to be launched in the future has been calculated based on historical analysis. This analysis has been supported by proxy factors such as the innovation scale of the companies, the status of funding, collaborations, customer base, and patent scenario.

The scope of availability of drainage systems and accessories in a particular region has been assessed based on a comprehensive analysis of companies' prospects, the regional end-user perception, and other factors impacting the launch of products in that region.

The base year considered for the calculation of the market size is 2022. A historical year analysis has been done for the period FY2018-FY2021. The market size has been estimated for FY2022 and projected for the period FY2023-FY2027.

Revenues of the companies have been referenced from their annual reports for FY2021 and FY2022. For private companies, revenues have been estimated based on factors such as inputs obtained from primary research, funding history, product approval status, market collaborations, and operational history.

Regional distribution of the market revenue has been estimated based on the companies in each region and the adoption rate of drainage systems and accessories. All the numbers have been adjusted to a single digit after the decimal for better presentation in the report. However, the real figures have been utilized for compound annual growth rate (CAGR) estimation. The CAGR has been calculated for the period 2023-2027.

The market has been mapped based on the available drainage systems and accessories. All the key companies with significant offerings in this field have been considered and profiled in this report.

Market strategies and developments of key players have been considered for the calculation of the potential of the market in the forecast period.

Primary Research:

The primary sources involve industry experts in the medical and surgical drainage systems market, including the market players offering drainage systems and accessories. Resources such as COOs, vice presidents, product managers, directors, territory managers, and business development have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from the primary sources include:

- Validation and triangulation of all the numbers and graphs

- Validation of the report's segmentation and key qualitative findings for drainage systems and accessories

- Understanding the competitive landscape and business model

- Current and proposed production values of a product by market players

- Validation of the numbers of the different segments of the market in focus

- Percentage split of individual markets for regional analysis

Secondary Research

Open Sources

Centers for Disease Control and Prevention (CDC), National Institutes of Health (NIH), World Health Organization (WHO), National Center for Biotechnology Information and, among others, were used as open sources for the market estimation of the global medical and surgical drainage systems market.

Annual reports, SEC filings, and investor presentations of the leading market players

Company websites and detailed study of their portfolios

Gold standard magazines, journals, whitepapers, press releases, and news articles

Databases

The key data points taken from the secondary sources include:

Segmentation and percentage share estimates

company and country understanding, and data for market value estimation.

Key industry/market trends

Developments among top players

Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

Quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Key Companies Profiled:

B. Braun SE

Becton, Dickinson and Company

Cardinal Health, Inc.

Convatec Group Plc

Cook Medical

Hangzhou Fushan Medical Appliances Co., LTD.

Johnson & Johnson

Medela AG

Medline Industries, LP

Medtronic plc

Ningbo Luke Medical Co., LTD.

Olympus Corporation

Redax

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Zimmer Biomet Holdings, Inc.

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