

Global Custom Procedure Packs Market Size Study & Forecast, by Product Type (Anesthesia Packs, Cardiovascular Surgery Packs, Neurosurgery Packs, Ophthalmic Surgery Packs, Orthopedic Surgery Packs, Other Procedure Packs), By End-user (Hospitals, Clinics, Ambulatory Surgery Centers, Others), and Regional Analysis, 2023-2030

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Abstracts

Global Custom Procedure Packs Market is valued approximately at USD 7.28 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 4.6% over the forecast period 2023-2030. Custom procedure packs are pre-assembled sets of medical supplies tailored for specific surgeries or medical procedures. They include surgical instruments, drapes, gauze, syringes, and other disposable items needed for the surgery. These packs streamline surgical preparation, reduce setup time, and enhance efficiency in operating rooms, benefiting both healthcare providers and patients. Customized to meet specific surgical needs, they optimize workflows and help manage costs within healthcare facilities. The global market for custom procedure packs is witnessing significant growth driven by factors such as reduced preparation time, enhanced surgical efficiency, consistency and cost-effectiveness in healthcare facilities. Also, a significant driver of market growth is the escalating global prevalence of chronic diseases like cardiovascular diseases, orthopedic conditions, and emergent cases necessitating surgical interventions. For instance, data from the Australian Bureau of Statistics, updated in March 2022, revealed that heart disease affected approximately 4.0% of the Australian population in 2021, accounting for 1.0 million individuals. The prevalence of heart disease increased with age, ranging from 2.3% among those aged 45-54 years to 23.2% among individuals aged 75 years and older. Additionally, the same source indicated that in 2021, 375.8 thousand individuals (1.5% of the population)

in Australia were afflicted with chronic obstructive pulmonary disease (COPD). The substantial burden of chronic illnesses necessitating surgical interventions, coupled with severe road accidents, is anticipated to drive demand for surgeries or prophylactic measures that rely on procedure packs, thereby fueling market growth.

Moreover, the market is experiencing a significant surge in the growth due to the increasing number of surgical procedures and the expanding utilization of surgical packs in these operations. Surgical interventions, including cardiovascular, general surgery, and ophthalmic procedures, are becoming more widespread, driven by the escalating incidence of chronic diseases and growing awareness about surgical options. Moreover, the rise in surgical healthcare spending and improved reimbursement policies in several countries are bolstering surgical volumes, thereby amplifying the adoption of surgical packs. For instance, data from Mass General Brigham in 2023 announced that over 900,000 cardiac surgeries, including coronary bypass surgeries, are performed annually in the U.S., driving market growth. Additionally, as per the WHO European Regional Obesity 2022 report, obesity and overweight have reached epidemic levels in the European Region, impacting nearly 60% of adults. Furthermore, data from NHS Digital's National Obesity Audit, released in August 2022, revealed that a total of 4,035 individuals underwent primary bariatric procedures in England during 2021-2022. The rise in orthopedic surgeries, such as hip, knee, and joint replacements, further propels the demand for surgical packs. Thus, these aforementioned factors are propelling the growth of Custom Procedure Packs Market during the estimated period. Furthermore, the growing focus on Minimally Invasive Surgery (MIS), as well as advancement in medical technology presents various lucrative opportunities over the forecast years. However, the stringent regulatory framework for maintaining quality of packs and product recalls and presence of faulty and unnecessary devices along with the procedure packs are challenging the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Custom Procedure Packs Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 with largest market share owing to the robust healthcare infrastructure and a surge in ophthalmological, orthopedic, and general surgeries. Moreover, increased awareness regarding the advantages of utilizing packs and the introduction of new products are expected to further propel market growth in the region. For instance, data released by the American Society for Metabolic and Bariatric Surgery revealed an estimated 262,893 bariatric surgeries conducted in the U.S. in 2021. Consequently, the escalating number of surgeries has led to heightened adoption and utilization of these packs within the region. Whereas, Asia

Pacific region is expected to grow at the fastest CAGR over the forecast years. The rise in aging population in countries such as India and China necessitates increased medical intervention and surgical assistance are significantly propelling the market demand across the region.

Major market players included in this report are:

Cardinal Health (U.S.)

Paul Hartmann AG (Germany)

Unisurge (U.K.)

M?Inlycke Health Care AB (Sweden)

Medline Industries, LP (U.S.)

PrionTex (South Africa)

Kimal Group (U.K.)

O&M Halyard (U.S.)

B. Braun SE (Germany)

Minnesota Mining and Manufacturing Company (3M)

Recent Developments in the Market:

In February 2023, Kimal announced its participation in the Pan Arab Interventional Radiology Society (PAIRS) Annual Congress at the Grand Hyatt Hotel in Dubai. The company aims to spotlight its tailored procedure pack solutions designed for Interventional, Non-Vascular, HSG, Drainage, Embolization, Catheter Insertion, and Neuro Radiology procedures.

In March 2022, Cardinal Health introduced a surgical incise drape integrated with antiseptic Chlorhexidine Gluconate. This innovation aims to mitigate the risk of surgical site infections (SSIs) associated to surgical site contamination.

In March 2022, Medline Industries, LP partnered with the University Hospital Enhanced Recovery after Surgery (UH ERAS) Team to develop a personalized direct-to-patient kit tailored for surgical procedures. This collaboration aims to elevate patients' surgical journey, ranging from pre-surgery to recovery, enhancing their overall experience.

Global Custom Procedure Packs Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Product Type, End-user, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Product Type:

Anesthesia Packs

Cardiovascular Surgery Packs

Neurosurgery Packs

Ophthalmic Surgery Packs

Orthopedic Surgery Packs

Other Procedure Packs

By End-user:

Hospitals

Clinics

Ambulatory Surgery Centers

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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