

Global Surgical Stapling Devices Market: Analysis By Type (Disposable Surgical Stapling Device and Reusable Surgical Stapling Device), By Product (Powered Surgical Stapling Device and Manual Surgical Stapling Device), By Application (Orthopedic Surgery, Endoscopic Surgery, Cardiac and Thoracic Surgery, Abdominal and Pelvic Surgery, and Others), By Region Size and Trends with Impact Analysis of COVID-19 and Forecast up to 2029

<https://marketpublishers.com/r/G4DABA7B524FEN.html>

Date: August 2024

Pages: 162

Price: US\$ 2,350.00 (Single User License)

ID: G4DABA7B524FEN

Abstracts

The global surgical stapling devices market was valued at US\$5.23 billion in 2023. The market value is expected to reach US\$8.32 billion by 2029. Surgical stapling devices are specialized instruments used in surgical procedures to staple tissues or organs, as well as to make incisions or cut through tissues. These instruments work by applying a sequence of small staples to firmly close tissues and blood vessels, which ensures accurate closures.

One of the primary drivers of this expansion is the increasing shift towards minimally invasive procedures, which offer benefits such as reduced pain, shorter recovery times, and lower risk of infection. Additionally, upsurge in healthcare expenditure and investments in innovative surgical technologies have further propelled market growth. Increased access to healthcare services, including surgical operations, is the result of the expansion of the healthcare infrastructure in emerging nations. In turn, this has increased demand for surgical stapling devices, fueling market expansion. The market is expected to grow at a CAGR of approx. 8% during the forecasted period of 2024-2029.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the global surgical stapling devices market into two types: Disposable Surgical Stapling Device and Reusable Surgical Stapling Device. The disposable surgical stapling devices segment held the highest share of the market. The market is experiencing significant growth and is poised to continue expanding in the coming years due to several key factors. Firstly, the segment is characterized by its convenience and the ability to eliminate the need for cleaning and reprocessing, which contributes to its widespread adoption in various surgical settings. Additionally, the rise in surgical operations, the prevalence of chronic diseases, and the desire for minimally invasive procedures are some of the factors propelling the disposable segment of the surgical stapling device market.

By Product: The global surgical stapling devices market has been further analyzed based on the product: Powered Surgical Stapling Device and Manual Surgical Stapling Device. The powered surgical stapling device segment held the dominant share in the market as they provide enhanced functionality and adaptability for complex surgical needs. The segment is experiencing rapid growth attributed to the wide range of benefits associated with powered staplers, such as ease of use, minimal risk of complications like blood loss/leakage, shorter operating time, reduced hospital costs as compared to manual staplers, technological advancements and increasing adoption in specialized surgical fields. Moreover, advantages offered by powered stapling devices compared to manual staplers such as simplicity of wound closure without requiring physical effort and the availability of powered surgical stapling devices in various sizes are estimated to augment the market segment growth.

By Application: The global surgical stapling devices market has been further analyzed based on the application: Orthopedic Surgery, Endoscopic Surgery, Cardiac & Thoracic Surgery, Abdominal & Pelvic Surgery, Others. The orthopedic surgery segment held the dominant share in the market. The growth in this segment is driven by the rising prevalence of orthopedic conditions, including age-related disorders like osteoarthritis and osteoporosis, that drives the demand for surgical interventions such as joint replacements and fracture repairs. Advances in surgical techniques and technologies, including minimally invasive procedures and improved surgical stapling devices, enhance the precision and effectiveness of orthopedic surgeries, further fueling market growth.

By Region: In the report, the global surgical stapling devices market is divided into five

regions: North America (The US, Canada, and Mexico), Europe (Germany, The UK, France, Italy, Spain and Rest of Europe), Asia Pacific (China, Japan, India, Australia, South Korea, and Rest of Asia Pacific), South & Central America and Middle East and Africa. In 2023, the North America region led the surgical stapling devices market, propelled by the growing adoption of technologically advanced laparoscopic surgical staplers combined with the rising acceptance of surgical robots that use powered stapling devices across the region and the increase in preference of key players to launch new products of surgical stapler.

During 2024-2029, the US is forecasted to maintain its lead within North America, owing to the country's advanced healthcare system, high number of surgical interventions, ongoing innovations in stapling technology and the growing demand for improved medical technology all create significant potential possibilities for the surgical stapling devices market. With a significant number of surgeries performed annually and substantial investments in medical research and technology, the US remains a central hub for market expansion. Canada and Mexico are also emerging as important markets, with growing healthcare investments and increasing adoption of advanced surgical devices.

Market Dynamics:

Growth Drivers: The global surgical stapling devices market growth is predicted to be supported by numerous growth drivers such as burgeoning prevalence of chronic diseases, upsurge in healthcare expenditure, rapidly expanding geriatric population, growth in surgical procedures, favouritism for minimally invasive procedures, increasing preference for surgical staplers over sutures and many other factors. The growing preference for surgical staplers over traditional sutures is a key driver in the expansion of the global surgical stapling devices market, largely due to the distinct advantages that staplers offer in modern surgical procedures. The advancement in stapling technology, including features like adjustable staples and compatibility with minimally invasive procedures, further boosts their appeal by enhancing precision and reducing patient discomfort. Thus, these factors drive the increased adoption of surgical staplers in various surgical settings, contributing to the robust growth of the surgical stapling devices market.

Challenges: However, the market growth would be negatively impacted by various challenges such as cost of cutting-edge surgical stapling devices, risk of device malfunctions and complications, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as growing acceptance of aesthetic and cosmetic procedures, rising incidence of obesity, surging trend of medical tourism, increasing number of regulatory approvals and new product launches, technological advancements, etc. The market for surgical staplers holds significant potential for industry players, driven by the growing popularity of aesthetic procedures, increased medical tourism, and improved health outcomes in emerging countries. As more individuals seek elective and cosmetic surgeries, including those abroad to take advantage of lower costs or specialized expertise, the demand for efficient and reliable surgical tools, such as staplers, escalates, further fueling market expansion market.

Impact Analysis of COVID-19 and Way Forward:

The global surgical stapling devices market was negatively affected by the COVID-19 pandemic, due to reduced surgical procedures, disruptions in supply chains, and shifting healthcare priorities during the pandemic. Resources were redirected towards managing COVID-19 patients and ensuring the availability of critical supplies and equipment. This shift in focus impacted the procurement and usage of surgical stapling devices, as healthcare facilities concentrated their efforts on combating the pandemic. However, the market showed signs of recovery in the following year, characterized by a rebound as elective surgeries resumed and healthcare systems adapted to the pandemic's new realities.

Competitive Landscape:

The global surgical stapling devices market is extremely consolidated. The key players in the global surgical stapling devices market are:

Johnson & Johnson (Ethicon Inc.)
Medtronic plc
ConMed Corporation
Smith & Nephew Plc
Becton, Dickinson and Company
Braun Holding GmbH & Co. KG
Stryker Corp.
3M Company
Boston Scientific Corporation
Zimmer Biomet Holdings, Inc.
Meril Life Sciences Pvt. Ltd.

Intuitive Surgical Inc.
Grena Limited

The global surgical stapling devices market are focusing on tapping emerging markets to increase market share and the consumer base through exclusive product launches and approval in the emerging market. Apart from this, the growing efforts of major players to offer cost-effective and superior quality products are expected to fuel the growth of the global surgical stapling devices market in the coming years. Some of the strategies among key players in the market for surgical stapling devices are partnerships, mergers, acquisitions, and collaborations. In January 2024, Teleflex Incorporated made the Titan SGS Stapler available with Staple Line Reinforcement. This stapler is helpful for bariatric surgeons who choose to buttress on every staple fire during the sleeve gastrectomy. On the other hand, in November 2023, TÜV Rheinland, a Germany-based testing, certification, and inspection service provider, issued an MDR certificate to the Powered Endoscopic Stapler from Ezisurg Medical. This stapler is useful in tissue resection, transection, and creating anastomoses in minimally invasive and open surgery.

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