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U.S. Orthopedic Ambulatory Surgery Center Market Size, Share & Trends Analysis Report By Procedure (ACL Reconstruction, Knee Replacement, Hip Replacement, Shoulder Replacement, Arthroscopy, Foot & Ankle), And Segment Forecasts, 2023 - 2030

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Abstracts

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U.S. Orthopedic Ambulatory Surgery Center Market Growth & Trends

The U.S. orthopedic ambulatory surgery center market size is expected to reach USD 15.0 billion by 2030, expanding at a CAGR of 4.61% over the forecast period, based on a new report by Grand View Research, Inc. The lower cost of treatment at ambulatory surgery centers (ASC)s compared to the HOPDs and the reduction of the duration of the procedure is expected to boost the market growth. ASCs are substantially faster and are preferred for low-acuity surgeries. As per an article published by International Association for Ambulatory Surgery in 2019, on average, ASCs require around 31.8 fewer minutes to operate on a patient compared to hospital-based outpatient departments.

The preference of orthopedic companies is growing toward the ASCs and many spine and orthopedic device manufacturers have partnered or are developing strategies to partner with ASCs to support and advance the mode of treatment. Companies including Smith+Nephew, Stryker, and Exactech are developing their service lines focused on ASCs and enhancing their technologies to support the performance of ASCs. For instance, in February 2020, Smith+Nephew launched a program dedicated to ASCs for the advancements of outpatient surgery programs. Moreover, the company has launched Positive Connections, an ASC division that aids customers in fulfilling their goals within ASC settings.

The COVID-19 pandemic has significantly impacted the orthopedic ASCs market during the initial period, owing to the postponement of nonurgent orthopedic surgeries and the decline in patient volumes due to stringent guidelines. Post-pandemic patients are shifting from hospital settings to outpatient settings for the treatment of orthopedic conditions, contributing to market growth. Moreover, hospitals are shifting toward acquiring ASCs post-pandemic owing to the shift in patient preference for ASCs due to the fear of exposure to COVID-19 in hospitals. For instance, in November 2021, Tenet Healthcare Corporation and United Surgical Partners International (USPI), its subsidiary, entered into a definitive agreement to acquire 92 ASCs owned by SurgCenter Development (SCD).

U.S. Orthopedic Ambulatory Surgery Center Market Report Highlights

In 2022, the fracture repair segment held the largest revenue share due to the increased prevalence of sports injury and easy accessibility to ASCs compared to hospitals

The knee replacement segment is anticipated to witness significant growth over the forecast period owing to the growing reimbursement policies by the CMS for knee replacement surgeries at the ASCs

For instance, in January 2020, total knee replacement surgeries performed in an ASC setting became eligible for Medicare reimbursement, which facilitated the shift of patients from hospital settings to ASCs

The U.S. government is considering the role of these centers as an important aspect of healthcare and is undertaking initiatives to ensure proper reimbursement, fueling market growth. For instance, in November 2022, CMS issued the 2023 final payment rules for HOPDS and ASCs. The CMS finalized a 3.8% update, which is the combination of a 4.1% update of inflation and a reduction in productivity of around 0.3% mandated by the Affordable Care Act

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