

Surgical Equipment Market Report by Product (Surgical Sutures and Staplers, Handheld Surgical Equipment, Electrosurgical Devices, and Others), Category (Reusable Surgical Equipment, Disposable Surgical Equipment), Application (Neurosurgery, Plastic and Reconstructive Surgery, Wound Closure, Obstetrics and Gynecology, Cardiovascular, Orthopedic, and Others), End User (Hospitals, Ambulatory Surgical Centers, and Others), and Region 2024-2032

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Abstracts

The global surgical equipment market size reached US\$ 18.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 33.0 Billion by 2032, exhibiting a growth rate (CAGR) of 6.37% during 2024-2032. The rising aging population, increasing prevalence of chronic diseases, significant technological advancements, rapidly expanding global healthcare infrastructure, stringent regulatory environment, and growing medical tourism are some of the major factors propelling the market growth.

Surgical Equipment Market Analysis:

Major Market Drivers: The rising aging population, surging incidences of chronic conditions such as diabetes, cancer, and cardiovascular disease, expanding healthcare infrastructure, etc., are propelling the market demand. In line with this, governments and private healthcare organizations are investing heavily in healthcare infrastructures, including hospitals and surgical centers. These

investments lead to the adoption of advanced surgical equipment to enhance patient care and outcomes.

Key Market Trends: The growing advancement of technology, rising surgical procedures, and surging demand for minimally invasive surgeries are some of the key factors propelling the industry growth. Efforts to improve healthcare access in developing countries are also contributing to the growth of the surgical equipment market. As healthcare infrastructure improves and more people gain access to medical facilities, thereby the demand for surgical equipment increases.

Geographical Landscape: According to the report, North America accounted for the largest market share. The growth of the region is attributed to the rising inclination towards minimally invasive surgeries in North America. These procedures offer numerous benefits, such as smaller incisions, shorter hospital stays, faster recovery times, and reduced risk of complications.

Competitive Landscape: Some of the leading companies are Alcon, B. Braun Melsungen AG, Becton Dickinson and Company, Boston Scientific Corporation, CONMED Corporation, Integra LifeSciences, Intuitive Surgical Inc., Johnson & Johnson, Medtronic plc, Olympus Corporation, Smith & Nephew plc, Stryker Corporation, and Zimmer Biomet, among many others.

Challenges and Opportunities: The rising pressure to reduce costs, technological complexity, reimbursement policies, and increasing compliance with regulatory requirements are some of the key challenges hampering the market growth. However, the shift towards personalized medicine offers opportunities for customized surgical equipment tailored to individual patients' needs. This includes patient-specific implants and instruments designed using advanced imaging and 3D modeling techniques.

Surgical Equipment Market Trends:

Increasing Geriatric Population

The aging population is experiencing a significant rise across the globe. According to the World Health Organization, the number of people aged 60 years and above surpassed the number of children aged below five years in 2020. In line with this, the

population across the world over 60 years will nearly double from 12% to 22% between 2015 and 2050. As people age, they become more prone to various medical conditions that often require surgical intervention. Chronic conditions like osteoarthritis, cardiovascular diseases, cancer, and vision impairments become more prevalent with age, necessitating surgical treatments. For instance, according to the Journal of American Heart Association, between 55% to 98% of older adults aged 60 years and above have at least two chronic diseases. Cardiovascular diseases are most common among older people. Apart from this, the aging population leads to an increased prevalence of conditions like cataracts and glaucoma, requiring ophthalmic surgeries. Surgical equipment, including specialized instruments and implants, is crucial for the successful execution of these procedures. For instance, according to the Centers for Disease Control and Prevention, nearly 20.5 million Americans aged 40 years or above have cataracts in at least one eye, and around six million have had their lens removed. The growing elderly demographic, coupled with advancements in surgical techniques, underscores the continued significance of surgical equipment in addressing the healthcare needs of this demographic.

Rising Prevalence of Chronic Diseases

The growing incidence of various chronic diseases like cardiovascular, cancer, and respiratory disease requires surgeries. In line with this, the surging adoption of unhealthy lifestyles among individuals owing to hectic work schedules and sedentary patterns, is leading to numerous conditions like diabetes, obesity, hypertension, etc. For instance, according to the National Library of Medicine, in 2019, nearly 77 million people suffered from diabetes in India. Also, this number is expected to reach more than 134 million by 2045. Diabetes, which ranks among the top 10 causes of death along with cancer, respiratory disorders, and cardiovascular disease (CVD), is one of the biggest worldwide health catastrophes of this century. The World Health Organization (WHO) reports that noncommunicable diseases accounted for 74% of fatalities worldwide in 2019. Diabetes was the tenth biggest cause of death worldwide in 2019 with 1.6 million deaths. These factors are further expected to stimulate the demand for immediate surgeries, driving the market growth. Additionally, the global burden of cancer is on the rise, with various forms of cancer requiring surgery as a vital component of treatment. Surgical equipment, such as minimally invasive instruments and precision-guided devices, is instrumental in addressing these health challenges. For instance, according to the data collected by the National Centers for Health Statistics, around 2,001,140 new cancer cases are projected to occur in the United States in 2024. This is further driving for surgery equipment market demand.

Significant Technological Advancements

Technological advancements have greatly improved minimally invasive surgical techniques. Equipment such as laparoscopic instruments, endoscopes, and robotic-assisted surgical systems allow for smaller incisions, reduced trauma to tissues, faster recovery times, and fewer complications compared to traditional open surgery. For instance, in July 2023, Genesis Medtech, a medical device company received approval for its ArtiSential, a series of articulating laparoscopic instruments from China's National Medical Products Administration. A laparoscopic surgical tool called ArtiSential™ replicates a surgeon's wrist and finger movements, offering several clinical benefits that improve surgical accuracy and results. These factors are further stimulating the industry's growth. Moreover, robotic surgical systems, such as the da Vinci Surgical System, have revolutionized surgical procedures. These systems offer enhanced precision, dexterity, and visualization, allowing surgeons to perform complex operations with greater accuracy. Robotic surgery also enables remote surgery and telesurgery, expanding access to specialized care. For instance, in January 2024, Augusta Health expanded its robotic-assisted surgery capabilities to include total joint replacement. Moreover, in April 2024, with the use of its ROSA Shoulder System, Zimmer Biomet Holdings, Inc., a leader in medical technology worldwide, successfully completed the first robotic-assisted shoulder replacement procedure ever. Besides this, high-resolution imaging technologies, including MRI, CT scans, and intraoperative imaging devices, provide surgeons with detailed anatomical information in real-time. This enables more accurate preoperative planning, intraoperative navigation, and improved surgical outcomes, thereby positively influencing the surgical equipment market share.

Surgical Equipment Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global surgical equipment market report, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on the product, category, application, and end user.

Breakup by Product:

Surgical Sutures and Staplers

Handheld Surgical Equipment

Forceps and Spatulas

Retractors

Dilators

Graspers

Auxiliary Instruments

Cutter Instruments

Electrosurgical Devices

Others

Surgical sutures and staplers dominate the market

The surgical equipment market report has provided a detailed breakup and analysis of the market based on the product. This includes surgical sutures and staplers, handheld surgical equipment (forceps and spatulas, retractors, dilators, graspers, auxiliary instruments, cutter instruments), electrosurgical devices, and others. According to the surgical equipment market report, surgical sutures and staplers represented the largest segment.

Surgical sutures and staplers are fundamental tools used across a wide spectrum of surgical procedures, ranging from general surgery to specialized disciplines like cardiovascular and orthopedic surgery. Their versatility and applicability make them indispensable in the operating room, contributing to their significant market share. Besides this, the increasing prevalence of chronic diseases and age-related conditions necessitates a growing number of surgeries. Surgical sutures and staplers are essential for wound closure and tissue approximation, ensuring patient safety and proper healing. As surgical volumes rise, so does the demand for these products. For instance, in February 2024, Novo Integrated Sciences, and Clinical Consultants International, a Novo wholly-owned subsidiary, signed an agreement with Futura Surgicare Pvt Ltd, a manufacturer of wound closure and surgical products based in India. Futura offers a wide range of cutting-edge products, such as surgical sutures, skin staplers, hemostats, surgical tapes, hernia meshes, and bone wax.

Breakup by Category:

Reusable Surgical Equipment

Disposable Surgical Equipment

Reusable surgical equipment holds the largest share in the market

A detailed breakup and analysis of the market based on the category have also been provided in the report. This includes reusable surgical equipment and disposable surgical equipment. According to the report, reusable surgical equipment accounted for the largest market share.

According to the surgical equipment market outlook, the rising demand for reusable surgical equipment is attributed to the surging penetration towards cost-effective solutions for healthcare facilities. While the initial investment in reusable equipment may be higher than disposable alternatives, its long-term value becomes evident as it can be sterilized and used for multiple procedures. This cost-efficiency is particularly attractive to hospitals and surgical centers aiming to manage expenses efficiently. Additionally, environmental concerns and sustainability have gained prominence in recent years. The reuse of surgical equipment aligns with eco-friendly practices by reducing the volume of medical waste generated during surgeries.

Breakup by Application:

Neurosurgery

Plastic and Reconstructive Surgery

Wound Closure

Obstetrics and Gynecology

Cardiovascular

Orthopedic

Others

The report has provided a detailed breakup and analysis of the market based on the application. This includes neurosurgery, plastic and reconstructive surgery, wound closure, obstetrics and gynecology, cardiovascular, orthopedic, and others.

The neurosurgery segment encompasses a range of specialized surgical equipment and tools tailored to the intricate procedures performed on the brain and spinal cord. These include microsurgical instruments, cranial implants, and neurostimulation devices. While plastic and reconstructive surgery is dedicated to enhancing and restoring the physical appearance and function of a patient. In this segment, surgical equipment is designed for procedures like breast reconstruction, facial rejuvenation, and scar revision. The demand for plastic and reconstructive surgery equipment has surged due to the growing popularity of cosmetic procedures and the need for reconstructive surgery after traumatic injuries or cancer treatments. Advanced tools, such as tissue expanders and implantable devices, are essential for achieving aesthetically pleasing and functional results. Besides this, the wound closure segment focuses on surgical equipment essential for closing surgical incisions, lacerations, and other wounds. It includes a variety of instruments like sutures, staples, and adhesive agents. The demand for wound closure equipment remains steady, driven by the constant need for efficient and aseptic wound closure techniques in a wide range of medical procedures.

Breakup by End User:

Hospitals

Ambulatory Surgical Centers

Others

Hospitals hold the largest share in the market

A detailed breakup and analysis of the market based on the end user has also been provided in the report. This includes hospitals, ambulatory surgical centers, and others. According to the report, hospitals accounted for the largest market share.

As per the surgical equipment market forecast, hospitals are the primary hubs for surgical procedures and medical interventions of all kinds. They cater to a wide

spectrum of healthcare needs, ranging from routine surgeries to complex, specialized procedures. Additionally, hospitals typically have larger budgets and resources compared to other healthcare facilities, enabling them to invest in a comprehensive array of surgical equipment. This includes state-of-the-art instruments, imaging systems, and operating room technology, ensuring they can offer a broad range of surgical services to their patients. Furthermore, the critical nature of healthcare services provided by hospitals necessitates a high standard of patient care. For instance, in December 2023, WHO personnel took part in a joint UN operation at Al-Shifa Hospital in north Gaza to provide medical supplies and evaluate the facility's condition. The team supplied the hospital with anesthesia supplies and materials, orthopedic surgery equipment, and medications.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance in the market

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America possesses a highly developed and sophisticated healthcare infrastructure. The region is home to numerous world-renowned medical institutions, research centers, and hospitals. These facilities demand cutting-edge surgical equipment to provide the highest standard of care to their patients. Additionally, the region witnesses a consistently high volume of surgical procedures across various specialties, ranging from cardiovascular and orthopedics to neurosurgery and plastic

surgery. This extensive surgical activity drives the demand for a wide array of surgical instruments and devices. For instance, in November 2023, Cardinal Health launched their SmartGown™ EDGE Breathable Surgical Gown with ASSIST™ Instrument Pockets in the United States. This product is designed to give surgical teams easy and secure access to instruments during surgeries. This is further expected to propel the demand for surgical equipment in the region.

Competitive Landscape:

Leading surgical equipment manufacturers continually invest in research and development to create innovative and technologically advanced products. They focus on designing surgical instruments and devices that are more precise, efficient, and user-friendly. For instance, the development of robotic-assisted surgical systems has been a groundbreaking innovation, enabling surgeons to perform complex procedures with greater precision. Additionally, key players often engage in mergers and acquisitions to expand their product portfolios and market presence. These strategic moves allow companies to access new technologies and capabilities. For example, a manufacturer specializing in laparoscopic instruments might acquire a company specializing in minimally invasive surgical robotics to offer comprehensive solutions. Other than this, they collaborate with healthcare providers and institutions to understand their needs better and develop customized solutions. These partnerships often result in the co-development of surgical equipment tailored to specific medical procedures, which enhances the adoption of their products. Besides this, with growing environmental concerns, some companies are emphasizing sustainability by developing eco-friendly and reusable surgical equipment. They aim to reduce medical waste and promote responsible healthcare practices, which resonates with environmentally conscious healthcare providers and institutions.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Alcon

B. Braun Melsungen AG

Becton Dickinson and Company

Boston Scientific Corporation

CONMED Corporation

Integra LifeSciences

Intuitive Surgical Inc.

Johnson & Johnson

Medtronic plc

Olympus Corporation

Smith & Nephew plc

Stryker Corporation

Zimmer Biomet

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Surgical Equipment Market Recent Developments:

May 2024: Alcon, a leading Swiss-American ophthalmology company, acquired Belkin Vision, an Israeli glaucoma treatment company, for nearly US\$ 335 Million.

April 2024: Hologic, Inc. agreed to pay about US\$ 310 Million to buy Endomagnetics Ltd. (Endomag®), a privately held company that develops technology for breast cancer surgeries.

January 2024: Boston Scientific Corporation announced to acquire Axonics, Inc., a publicly traded medical technology company that focuses on the development and commercialization of differentiated devices to treat urinary and bowel dysfunction.

Key Questions Answered in This Report

1. How big is the global surgical equipment market?
2. What is the expected growth rate of the global surgical equipment market during 2024-2032?
3. What are the key factors driving the global surgical equipment market?
4. What has been the impact of COVID-19 on the global surgical equipment market?
5. What is the breakup of the global surgical equipment market based on the product?
6. What is the breakup of the global surgical equipment market based on the category?
7. What is the breakup of the global surgical equipment market based on the end user?
8. What are the key regions in the global surgical equipment market?
9. Who are the key players/companies in the global surgical equipment market?

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