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Surgical Site Infection Control Market Report by Product (Antibiotic Prophylaxis Products, Wound Care Dressings, Surgical Drapes, Surgical Clippers, Antiseptics and Disinfectants, Wound Irrigation Products, and Others), Infection Type (Superficial Incisional SSI, Deep Incisional SSI, Organ or Space SSI), Surgery Type (Cesarean Section, Gastric Bypass, Cataract Surgery, Dental Restoration, and Others), End User (Hospitals, Ambulatory Surgical Centers, and Others), and Region 2024-2032

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Abstracts

The global surgical site infection control market size reached US$ 4.6 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 6.5 Billion by 2032, exhibiting a growth rate (CAGR) of 3.78% during 2024-2032. The increasing surgical procedures, growing awareness about healthcare-associated infections, enhanced focus on patient safety, and surging healthcare expenditure are some of the major factors propelling the surgical site infection control market growth.

Surgical Site Infection Control Market Analysis:
Major Market Drivers: The rising cases of hospital-acquired infections and the increasing prevalence of chronic conditions, such as cancer, gastrointestinal disorders, cardiovascular diseases (CVDs), etc., due to the aging population, sedentary lifestyles, and unhealthy eating habits are propelling the adoption of surgical site infection control. Moreover, several favorable initiatives undertaken by the governing and non-governing agencies of various countries, such as the introduction of stringent guidelines and

training programs focused on infection control practices, are propelling the surgical site infection control market.

Key Market Trends: The increasing prevalence of surgical site infections, ongoing technological advancements in infection control products, rising adoption of minimally invasive surgeries, and introduction of stringent regulatory standards are expected to propel the surgical site infection control market demand. Moreover, with the rise in healthcare expenditure globally, there is a growing focus on improving patient outcomes and reducing healthcare-associated infections, including SSIs. This trend is expected to drive the demand for advanced infection control solutions in surgical settings.

Competitive Landscape: Some of the leading surgical site infection control market companies are 3M Company, Ansell Limited, Becton Dickinson and Company, bioMerieux SA. (Institut M?rieux), Covalon Technologies Ltd., GAMA Healthcare Ltd., Getinge AB (Carl Bennet AB), Johnson & Johnson, Kimberly-Clark Corporation, M?lnlycke Health Care AB, Prescient Surgical, and Steris Corporation, among many others.

Geographical Trends: According to the report, North America currently dominates the overall market. The region represents one of the largest markets for surgical site infection control products and services globally. The market size is influenced by factors such as the increase in the number of surgical procedures, advanced healthcare infrastructures, wide presence of regulatory landscape, ongoing technological innovations, etc. The market has been experiencing steady growth due to the increasing awareness about healthcare-associated infections and the importance of infection prevention measures.

Challenges and Opportunities: Antibiotic resistance, compliance issues, cost consideration, and variations in surgical practices and protocols across different healthcare facilities are some of the challenges that the market is facing. However, advances in medical technology, such as the development of antimicrobial coatings, novel surgical materials, and robotic-assisted surgery, offer the surgical site infection control market recent opportunities to enhance infection control in surgical settings.

Surgical Site Infection Control Market Trends:

Rising Geriatric Population

Many regions worldwide are experiencing a demographic shift characterized by a growing proportion of older adults aged 65 and above. For instance, according to the World Health Organization, by 2030, one in every six persons in the world will be 60 or older. At this time, the proportion of the population aged 60 and up will rise from 1 billion in 2020 to 1.4 billion. By 2050, the global population of persons aged 60 and up will double (2.1 billion). The number of people aged 80 and older is anticipated to treble

between 2020 and 2050, reaching 426 million. Older adults are more vulnerable to SSIs due to age-related changes in the immune system, reduced tissue healing capacity, and the presence of comorbidities such as diabetes, hypertension, and cardiovascular disease. As the geriatric population grows, there is a corresponding increase in the number of surgical procedures performed on older adults, leading to a higher demand for infection control measures to mitigate the risk of SSIs. For instance, according to an article published by the National Library of Medicine in March 2021, nearly 4 million surgical procedures were performed each year in older adults aged 65 years and above. In line with this, according to another article published by the National Library of Medicine in March 2023, in total knee replacement surgery, the SSI rates were higher in older adults aged 76-80 years when compared with the age group of 61-65 years. These factors are further bolstering the surgical site infection market revenue.

Increasing Surgical Procedure and Healthcare Infrastructure Development

There has been a significant increase in surgical procedures across the world. For instance, according to an article published by the National Library of Medicine, in September 2020, 11% of the world's illness burden necessitates surgical intervention, anesthetic management, or both. The most common procedures were for cataracts (22.8%), Caesareans (3.8%), fracture surgeries (3.27%), and hernias (2.86%). The necessary operations made up 44.2% of all surgeries. Moreover, healthcare infrastructure development initiatives, particularly in emerging markets, contribute to the growth of the surgical site infection control market. According to an article published by the India Investment Grid, public health expenditure is expected to rise to 2.5% of GDP by 2025. Apart from this, healthcare facilities and providers are increasingly investing in preventive strategies and technologies to minimize the incidence of SSIs. This includes the adoption of stringent protocols, advanced sterilization techniques, antimicrobial coatings for surgical instruments, and the utilization of high-tech materials in wound dressings and sutures. For instance, in December 2023, Flinders University and Chinese researchers collaborated to develop a new Ag-Ga orthopedic implant covering that is highly resistant to infection. The novel material could be readily and controllably put by spray-casting on numerous medical devices to protect them from infection while simultaneously providing an anti-inflammatory impact. Moreover, in October 2023, Sylke Inc. introduced SYLKE, the dressing manufactured from pure hypoallergenic silk fibroin. SYLKE promotes healing in surgical wounds and reduces complications and infections that might cause poor scarring. SYLKE seeks to transform surgical wound care by removing medical adhesive-related skin damage that causes infections and poor scarring outcomes.

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Advances in Research Studies and Clinical Trials

Advances in research studies and clinical trials play a crucial role in driving growth in the surgical site infection control market by facilitating the development of innovative products, enhancing treatment strategies, and improving patient outcomes. For instance, in February 2024, PolyPid Ltd., a biopharmaceutical company dedicated to improving surgical outcomes, announced considerable progress in its SHIELD II Phase 3 clinical study, after enrolling its 100th patient. This research looked at the efficacy of D-PLEX100, a product candidate intended to prevent surgical site infections (SSIs) in abdominal colorectal procedures. Top-line results from the SHIELD II trial were expected in the second half of 2024, with about 40 locations actively participating in the study. Moreover, research studies and clinical trials contribute to the identification of best practices and guidelines for infection prevention and control in surgical settings. Evidence-based recommendations regarding preoperative preparation, surgical techniques, antimicrobial prophylaxis, and postoperative care help standardize protocols and improve adherence to infection control measures, ultimately reducing the incidence of SSIs and improving patient outcomes. For instance, in August 2023, Emory University performed research which included over 20,000 patients and used automated methods to provide feedback and evaluate performance, found a 12% increase in antibiotic prophylactic compliance and a 33% decrease in overall SSIs. Data presented at the Surgical Infection Society's 2023 annual meeting showed that a unique automated antibiotic prophylaxis approach significantly reduces surgical site infections. These factors are further positively influencing the surgical site infection control market forecast.

Surgical Site Infection Control Key Market Segmentation:
IMARC Group provides an analysis of the key trends in each sub-segment of the global surgical site infection control market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on product, infection type, surgery type, and end user.

Breakup by Product:

Antibiotic Prophylaxis Products
Wound Care Dressings
Surgical Drapes
Surgical Clippers
Antiseptics and Disinfectants
Wound Irrigation Products

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Others

Antibiotic prophylaxis products currently exhibit a clear dominance in the market

The report has provided a detailed breakup and analysis of the market based on the product. This includes antibiotic prophylaxis products, wound care dressings, surgical drapes, surgical clippers, antiseptics and disinfectants, wound irrigation products, and others. According to the report, antibiotic prophylaxis products account for the majority of the global market share.

According to the surgical site infection control market outlook, antibiotic prophylaxis plays a crucial role in preventing surgical site infections (SSIs), which are a significant concern in healthcare settings. Antibiotics are usually administered shortly before surgical incision to achieve adequate tissue concentrations at the time of potential bacterial contamination. The timing of administration is critical and should ideally occur within 60 minutes before the surgical incision, although exceptions may exist for certain antibiotics and procedures. Moreover, prophylactic antibiotic regimens are often tailored to the specific requirements of different surgical procedures. For example, orthopedic surgeries may require coverage against Staphylococcus aureus and streptococci, while colorectal surgeries may necessitate additional coverage against gram-negative and anaerobic bacteria. For instance, in January 2024, the American Association for the Surgery of Trauma (AAST), the World Surgical Infection Society Europe (SIS-E), the Global Alliance for Infection in Surgery (GAIS), and the World Society of Emergency Surgery (WSES) collaborated to develop important guidelines for antibiotic prophylaxis (AP) in cases of traumatic lesions involving the head, brain, torso, maxillofacial region, extremities, skin, and soft tissues.

Breakup by Infection Type:

Superficial Incisional SSI
Deep Incisional SSI
Organ or Space SSI

Currently, superficial incisional SSI accounts for the majority of the global market share

A detailed breakup and analysis of the market based on the infection type have also been provided in the report. This includes superficial incisional SSI, deep incisional SSI, and organ or space SSI. According to the report, superficial incisional SSI currently holds the largest market share.

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According to the surgical site infection market overview, superficial incisional surgical site infections (SSIs) represent a significant portion of all SSIs. These infections occur within 30 days after the operation and involve only the skin and subcutaneous tissue of the incision. They are often characterized by symptoms such as redness, warmth, swelling, and localized pain at the surgical site. They are among the most common types of SSIs encountered in surgical practice. Their relatively high incidence underscores their importance in infection control efforts. For instance, according to an article published by the National Library of Medicine in 2023, 59% of the total SSI patients had superficial SSI.

Breakup by Surgery Type:

Cesarean Section
Gastric Bypass
Cataract Surgery
Dental Restoration
Others

Cesarean section currently holds the largest market share

The report has provided a detailed breakup and analysis of the market based on the surgery type. This includes cesarean section, gastric bypass, cataract surgery, dental restoration, and others. According to the report, the cesarean section holds the largest share in the overall market.

Cesarean sections are one of the most common surgical procedures globally. In many countries, the rates of C-section deliveries have been increasing steadily over the years. With such a high volume of procedures, the prevention of SSIs in C-sections becomes a significant focus of infection control efforts. Moreover, the surgical site in a Cesarean section is particularly vulnerable to infection due to its proximity to the genital and gastrointestinal tracts, which harbor numerous bacteria. Additionally, the procedure involves breaching the protective barriers of the skin and uterine wall, increasing the risk of contamination. Apart from this, SSIs following Cesarean sections can have serious consequences for both the mother and the newborn. In addition to causing discomfort and prolonging hospital stays for the mother, SSIs can lead to complications such as endometritis, wound dehiscence, sepsis, and increased healthcare costs. There's also a risk of vertical transmission of pathogens to the newborn, which can result in neonatal infections. For instance, according to World Health Organization (WHO) data, the use of

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cesarean sections is increasing, accounting for more than one in every five (21%) childbirths in 2021. This figure is expected to rise further over the next decade, with almost one-third (29%) of all births by cesarean section by 2030.

Breakup by End User:

Hospitals
Ambulatory Surgical Centers
Others

Currently, hospitals exhibit a clear dominance in the market

A detailed breakup and analysis of the market based on the end user have also been provided in the report. This includes hospitals, ambulatory surgical centers, and others. According to the surgical site infection control market report, hospitals exhibit a clear dominance in the market.

The demand for surgical site infection (SSI) control in hospitals arises from various factors related to patient safety, healthcare quality, regulatory requirements, and financial considerations. Preventing SSIs is essential for ensuring patient safety and minimizing the risk of postoperative complications. SSIs can lead to significant morbidity, prolonged hospital stays, increased healthcare costs, and in severe cases, mortality. Hospitals have a moral and ethical obligation to provide safe and high-quality care to their patients, which includes implementing measures to control SSIs. Moreover, hospitals are increasingly focused on delivering high-quality care and maintaining a positive reputation within their communities. Preventing SSIs is a fundamental aspect of healthcare quality improvement efforts. Hospitals that effectively control SSIs are perceived as safer and more reliable by patients, healthcare professionals, insurers, and regulatory agencies.

Breakup by Region:

North America
United States
Canada
Asia-Pacific
China
Japan
India

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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 currently dominates the global 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 currently dominates the global market.

According to the surgical site infection control market statistics, North America represents one of the largest markets for healthcare products and services globally. Within this context, the SSI control market encompasses a wide range of products, including antimicrobial agents, surgical drapes, gloves, sterilization equipment, wound care products, and surveillance systems. Despite advances in surgical techniques and infection control practices, SSIs remain a significant concern in North American healthcare facilities. The prevalence of SSIs varies across different surgical specialties and settings but represents a substantial clinical and economic burden on healthcare systems. For instance, in February 2021, Penn Medicine opened its new Interventional Support Center (ISC), making it one of the most prominent instrument processing and surgical supply preparation facilities in Southwest Philadelphia, United States. The ISC is one of Pennsylvania's first facilities of its sort, with staff sterilizing and packaging

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thousands of instruments daily in preparation for surgeries and procedures, ranging from basic scissors and clamps to complex robotic instruments. For instance, according to an article published by the National Library of Medicine, in February 2024, surgical site infections accounted for approximately two million nosocomial infections in the U.S., which considerably raises postoperative morbidity and mortality rates. In line with this, according to the international trial co-led by McMaster University and the University of Maryland School of Medicine in February 2024, thousands of patients yearly undergoing surgery for a closed fracture may avoid surgical site infections by using iodine povacrylex in alcohol to disinfect their skin.

Competitive Landscape:
The competitive landscape of the industry has also been examined along with the profiles of the key players that are mentioned below:

3M Company
Ansell Limited
Becton Dickinson and Company
bioMerieux SA. (Institut M?rieux)
Covalon Technologies Ltd.
GAMA Healthcare Ltd.
Getinge AB (Carl Bennet AB)
Johnson & Johnson
Kimberly-Clark Corporation
M?lnlycke Health Care AB
Prescient Surgical
Steris Corporation

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

Surgical Site Infection Control Market Recent Developments:
May 2024: Nanordica Medical, an Estonian medical technology firm, received ?1.75 million to enter the market with first-in-class wound care solutions that treat serious wounds.
April 2024: Vomaris launched PowerHeal, a bioelectric bandage approved by the FDA for over-the-counter (OTC) use in the management of wounds.
February 2024: PolyPid Ltd., a biopharmaceutical company dedicated to improving surgical outcomes, announced considerable progress in its SHIELD II Phase 3 clinical study, after enrolling its 100th patient. This research looked at the efficacy of D-

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PLEX100, a product candidate intended to prevent surgical site infections (SSIs) in abdominal colorectal procedures.

Key Questions Answered in This Report

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

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