

Disposable Surgical Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Product (Surgical sutures & staplers, Handheld surgical devices, Electrosurgical devices), By Application (Neurosurgery, Plastic & reconstructive surgery, Wound closure, Obstetrics & gynecology, Cardiovascular, Orthopedic, General surgery, Others), By Region, and By Competition

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Abstracts

Global Disposable Surgical Devices Market was valued at USD 5.34 billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.94% through 2029. In the realm of business, it is anticipated that the growing prevalence of chronic ailments, encompassing neurological, cardiovascular, infectious, and urological conditions, will drive market expansion. Furthermore, the elevated occurrence of illnesses like diabetes, cancer, and various autoimmune disorders on a global scale is a key contributor to the increasing volume of surgical procedures. According to statistics provided by the International Diabetes Federation (IDF), approximately 530 million individuals worldwide were afflicted with diabetes in 2021, and this figure is projected to reach 643 million by 2030. Type II diabetes represents the most prevalent form, afflicting 90% of the diabetic population.

Key Market Drivers

Rising Prevalence of Chronic Diseases

The global healthcare landscape is in the midst of a significant transformation, with the

prevalence of chronic diseases on the rise. Chronic diseases, including cardiovascular disorders, diabetes, cancer, and respiratory ailments, are increasingly becoming a global health concern. This surge in chronic conditions is not only affecting public health but is also driving substantial growth in the global disposable surgical devices market.

As chronic diseases become more widespread, the need for surgical interventions to manage and treat these conditions is also growing. Surgical procedures are often an essential part of the treatment plan for many chronic diseases. This includes procedures such as angioplasty for heart disease, amputations for diabetes-related complications, and surgeries to remove cancerous tumors. These surgeries require a range of specialized instruments, many of which are now designed for single use, thus driving the demand for disposable surgical devices.

Infection control is a paramount concern within the healthcare industry, and the risks associated with surgical site infections are significant. Patients with chronic diseases often have compromised immune systems, making them more vulnerable to infections. The use of disposable surgical devices, which are sterile and single-use, greatly reduces the risk of healthcare-associated infections, contributing to improved patient safety.

The increasing prevalence of chronic diseases has led to stricter regulations and standards in healthcare. Regulatory bodies such as the FDA in the United States and similar agencies globally have established stringent guidelines for infection control and patient safety. The use of disposable surgical devices is often encouraged to comply with these regulations, further driving the market's growth.

The management of chronic diseases can be financially burdensome for both patients and healthcare facilities. Disposable surgical devices offer a cost-effective solution in the long run. They eliminate the need for sterilization, maintenance, and reprocessing, which can be expensive and time-consuming. Hospitals and clinics are increasingly adopting disposable devices to reduce operational costs, contributing to market expansion.

Disposable surgical devices offer the advantage of convenience and time savings. Healthcare professionals can use these instruments straight out of the packaging, saving precious time on cleaning and sterilization processes. This is particularly valuable when dealing with chronic disease patients who require swift and efficient care.

The global push for environmental sustainability has led to the development of eco-friendly disposable surgical devices. These devices are designed with eco-conscious materials and manufacturing processes, aligning with the global healthcare community's efforts to reduce waste. As the prevalence of chronic diseases grows, the demand for environmentally friendly solutions in healthcare also rises, further boosting the market.

Infection Control and Patient Safety

In today's rapidly evolving healthcare landscape, infection control and patient safety have emerged as paramount concerns. The rising prevalence of healthcare-associated infections and the need to protect patients from unnecessary risks have led to a surge in the demand for disposable surgical devices. These sterile, single-use instruments are playing a crucial role in elevating patient safety and infection control standards while concurrently driving growth in the global disposable surgical devices market.

Healthcare-associated infections (HAIs) are a significant threat to patient safety. These infections can prolong hospital stays, increase healthcare costs, and, in severe cases, even lead to fatalities. The use of disposable surgical devices significantly reduces the risk of HAIs. Unlike traditional reusable devices, which require meticulous sterilization, disposable devices are guaranteed to be sterile upon opening, minimizing the chance of contamination during surgical procedures.

Healthcare regulatory agencies worldwide, such as the FDA in the United States and the European Medicines Agency (EMA), have established strict guidelines and standards for infection control and patient safety. These regulations emphasize the importance of using sterile, single-use instruments to reduce the risk of infection transmission. As a result, healthcare facilities and professionals are more inclined to adopt disposable surgical devices to adhere to these stringent standards, thereby boosting the market.

Patient safety is the cornerstone of any healthcare system. Disposable surgical devices are designed to minimize the risk of adverse events during surgical procedures. Patients can have confidence in the safety of their care, knowing that single-use, sterile instruments are being used. This confidence not only improves the overall patient experience but also helps healthcare facilities maintain their reputation and trustworthiness.

While cost-effectiveness may not be the primary driver, disposable surgical devices can offer long-term financial benefits to healthcare facilities. They eliminate the need for time-

consuming and expensive sterilization processes, as well as the maintenance and reprocessing of reusable instruments. This results in substantial time and cost savings, which are valuable resources in the healthcare industry.

Cross-contamination is a critical concern in healthcare settings. Reusable surgical instruments can potentially transmit pathogens from one patient to another, even when strict sterilization procedures are followed. Disposable devices eliminate this risk by being used for a single patient and then discarded, significantly reducing the chances of cross-contamination.

Cost-Efficiency

The global healthcare landscape is experiencing a transformation, with an increasing emphasis on cost-efficiency. In this context, the demand for disposable surgical devices is on the rise, significantly boosting the global market for these single-use instruments.

Healthcare facilities are under constant pressure to contain costs without compromising patient care. Disposable surgical devices offer a compelling value proposition in this regard. While the upfront costs may be slightly higher compared to traditional reusable instruments, the long-term savings are substantial. Hospitals and clinics benefit from the elimination of sterilization, maintenance, and reprocessing expenses associated with reusable instruments, making disposable devices a cost-efficient choice.

In healthcare, resources are often stretched to their limits. The efficient allocation of resources is crucial to ensuring that patients receive the best possible care. The adoption of disposable surgical devices allows healthcare professionals to allocate their time and resources more effectively. The time saved on cleaning and sterilization can be redirected toward patient care and other critical tasks, improving overall resource utilization.

Disposable surgical devices streamline healthcare operations by reducing the complexity of instrument management. Traditional reusable devices demand meticulous tracking, maintenance, and quality control, adding administrative and operational burdens. The simplicity of using disposable devices minimizes these operational complexities, leading to smoother workflows and reduced operational costs.

Infection control is a paramount concern in healthcare, and healthcare-associated infections (HAIs) are costly, both in terms of patient health and economic burden. The use of disposable surgical devices significantly reduces the risk of HAIs, which can lead

to substantial cost savings. Fewer infections result in shorter hospital stays, fewer readmissions, and reduced treatment expenses, all of which contribute to overall cost-efficiency.

Patients are increasingly concerned about healthcare costs, including those associated with surgical procedures. Disposable surgical devices indirectly benefit patients by reducing the risk of infections, complications, and extended hospital stays. This not only improves patient outcomes but also lowers the overall financial burden on patients, making healthcare more cost-efficient from their perspective.

Convenience and Time Saving

The global healthcare industry is undergoing a remarkable transformation, driven by the growing emphasis on convenience and time savings. This transformation is particularly evident in the increasing demand for disposable surgical devices, which offer a streamlined and efficient solution for healthcare professionals.

One of the key advantages of disposable surgical devices is immediate accessibility. These instruments are pre-packaged and ready for use, eliminating the need for extensive sterilization and preparation. In emergency situations, this quick access can be a lifesaver, making disposable devices an indispensable tool in healthcare settings where time is of the essence.

Disposable surgical devices provide healthcare professionals with an efficient and convenient solution. Traditional reusable instruments often require time-consuming sterilization processes, maintenance, and quality control checks. In contrast, disposable devices streamline surgical procedures, allowing medical teams to focus on patient care rather than the intricacies of instrument management.

Cross-contamination is a significant concern in healthcare settings. Even with stringent sterilization procedures, reusable instruments can potentially transmit pathogens from one patient to another. Disposable surgical devices eliminate this risk by being used for a single patient and then discarded, contributing to a safer and more efficient healthcare environment.

While convenience and time savings are the primary drivers, disposable surgical devices also offer long-term cost savings. They eliminate the need for expensive sterilization processes, maintenance, and reprocessing expenses associated with reusable instruments. This reduction in operational costs supports the economic viability

of healthcare facilities.

Patient safety is a paramount concern in healthcare. The use of disposable surgical devices enhances patient safety by reducing the risk of healthcare-associated infections. Patients can be confident that they are receiving care with sterile, single-use instruments, thereby improving their overall experience and well-being.

Key Market Challenges

Environmental Concerns

As healthcare institutions strive to reduce their environmental footprint, the issue of medical waste generated by disposable devices comes to the forefront. Many healthcare professionals and institutions are seeking ways to balance the convenience of disposables with sustainability. Manufacturers are responding by developing eco-friendly options, but achieving the right balance remains a challenge.

Reusable Alternatives

The competition between disposable and reusable instruments is an ongoing challenge. Some healthcare facilities continue to use and promote reusable devices due to their lower long-term costs. Convincing these institutions of the advantages of disposables in terms of infection control and patient safety can be a hurdle.

Standardization and Variety

The disposable surgical devices market offers a vast array of products, catering to different medical specialties and procedures. This variety can be overwhelming for healthcare providers. The challenge lies in achieving a balance between offering specialized instruments for specific procedures while maintaining a degree of standardization and simplicity in device selection.

Key Market Trends

Minimally Invasive Procedures

Minimally invasive surgery has gained prominence in recent years due to its numerous benefits, including reduced recovery times, lower infection rates, and shorter hospital stays. As a result, the demand for disposable surgical devices designed specifically for

minimally invasive procedures is on the rise. These instruments are expected to become more sophisticated and tailored to specific surgical techniques, further enhancing patient outcomes.

Sustainability and Eco-Friendly Products

Environmental sustainability is a growing concern in the healthcare industry. Many disposable surgical device manufacturers are responding to this trend by developing eco-friendly products. This includes using biodegradable materials and implementing sustainable manufacturing practices. Sustainable disposables align with global efforts to reduce medical waste and promote environmental responsibility.

Infection Control and Antimicrobial Coatings

Infection control remains a top priority in healthcare, and disposable surgical devices are at the forefront of this endeavor. Upcoming trends include the use of antimicrobial coatings and materials that inhibit the growth of pathogens, further enhancing patient safety. These innovations aim to reduce healthcare-associated infections and improve overall outcomes.

Segmental Insights

Product Insights

Based on the category of Product, surgical sutures and staplers claimed the largest market share in 2023. Surgical sutures refer to threads used post-surgery or in injury treatment to close incisions or mend cuts. On the other hand, surgical staplers, which are more precise than sutures, are also employed for wound closure, with the added advantage of a quicker stapling process. Furthermore, staples are associated with a lower risk of infection compared to sutures. Although sutures represent the traditional method for wound closure, they present a comparatively lower risk of wound reopening compared to staples. Notably, the increasing development of disposable sutures and staplers by various market players is poised to drive growth in this segment. As an illustration, in June 2022, Ethicon, Inc., a subsidiary of Johnson & Johnson, introduced the ECHELON 3000 Stapler in the United States, offering digitally enabled articulation for surgeons. With a 39% greater jaw aperture and a 27% expanded articulation span, it delivers enhanced control and real-time audible feedback, facilitating critical adjustments during procedures.

Looking ahead, electrosurgical devices are anticipated to experience the swiftest growth during the forecast period. Electrosurgical instruments enable surgeries to be performed in ambulatory surgical centers (ASCs) or clinics, eliminating the need for hospital settings. Outpatient settings typically entail short-duration surgeries, resulting in reduced surgical costs. Among all surgical instruments, electrosurgical products are currently witnessing substantial growth, with bipolar electrosurgical instruments proving highly valuable in minimally invasive endoscopic surgeries, propelling the growth of this segment. In June 2023, Olympus Corporation unveiled its latest electrosurgical generator, the ESG-410, designed for the treatment of bladder cancer and enlarged prostate. This device offers efficient treatment options for resection loops, band electrodes, and vaporization buttons and needles.

Application Insights

Based on Application, the field of general surgery took the lead in terms of market share. The expansion of this sector is primarily fueled by the rising incidence of chronic illnesses such as cancer, diabetes, and cardiovascular disorders, which necessitate surgical interventions. Furthermore, the growing preference for minimally invasive procedures, known for their lower infection and complication rates, is boosting the adoption of disposable surgical devices within the domain of general surgery.

Looking ahead, the plastic and reconstructive surgery segment is projected to experience the most rapid growth in the foreseeable future. According to data from the American Society of Plastic Surgeons, in 2020, there were 2.3 million cosmetic surgical procedures and 13.2 million minimally invasive cosmetic procedures performed in the United States. A significant portion of minimally invasive surgeries involve the utilization of disposable surgical instruments, which is anticipated to be a key driver of market growth.

Regional Insights

North America dominated the market share in 2023. This can be attributed to the growing occurrence of chronic diseases, including cardiovascular and neurological conditions, cancer, diabetes, and autoimmune diseases. Furthermore, a surge in the number of surgical procedures stemming from accidents, burns, and trauma cases is a major driving force behind the surgical instruments market in the region.

According to the World Health Organization (WHO), the European region bears

the heaviest burden of non-communicable diseases (NCDs), and this burden is expected to rise significantly in the near future. The WHO reports that chronic diseases like diabetes, cardiovascular disorders, chronic respiratory conditions, mental disorders, and cancer account for an estimated 86% of deaths in the region, contributing to 77% of the overall disease burden. Unhealthy dietary habits, sedentary lifestyles, smoking, and alcohol consumption are the primary culprits behind the increased disease burden in Europe. Surgical interventions play a crucial role in the treatment and management of these diseases, thereby driving the use of disposable surgical tools. With a notable increase in the number of surgeries conducted due to the rising incidence of chronic diseases, the demand for these instruments is on the rise.

In the forecast period, the Middle East and Africa are expected to experience the swiftest growth. This growth can be attributed to the high prevalence of cardiovascular, orthopedic, and other infections, an increasing incidence of these conditions, and higher expenditure on the prevention and diagnosis of infectious diseases, which are likely to be the key drivers of market expansion in this region.

The Asia Pacific segment is also expected to see significant growth during the forecast period. The region boasts a large patient population, which is poised to contribute to regional market growth. Japan, in particular, has a substantial geriatric population that requires heightened health care and attention. According to the Japan Cancer Society (JCS), one in three deaths in Japan is attributed to cancer, with lung and stomach cancers being the most common types. With the increasing prevalence of such cancers, preventive surgeries are frequently conducted to restrict the growth of malignant tumors in the body. Consequently, the growing number of surgeries is expected to boost the demand for disposable surgical devices in the Asia Pacific region.

Key Market Players

B Braun SE

Smith & Nephew PLC

Aspen Surgical Products Inc

Alcon Laboratories Inc

Zimmer Biomet Holdings Inc

Medtronic PLC

Ethicon Inc

CooperSurgical Inc

Surgical Innovations Corp

Report Scope:

In this report, the Global Disposable Surgical Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Disposable Surgical Devices Market, By Product:

Surgical sutures & staplers

Handheld surgical devices

Electrosurgical devices

Disposable Surgical Devices Market, By Application:

Neurosurgery

Plastic & reconstructive surgery

Wound closure

Obstetrics & gynecology

Cardiovascular

Orthopedic

General surgery

Others

Disposable Surgical Devices Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Disposable Surgical Devices Market.

Available Customizations:

Global Disposable Surgical Devices market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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