

Saudi Arabia Spine Surgery Market By Product (Spinal Fusion Devices, Spinal Decompression Devices, Non-Fusion Devices, Others), By Procedure (Discectomy, Laminotomy, Foraminotomy, Corpectomy, Facetectomy), By Region and Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Saudi Arabia Spine Surgery Market was valued at USD 255.68 Million in 2024 and is expected to reach USD 311.23 Million by 2030 with a CAGR of 3.53% during the forecast period. One of the primary drivers of the Saudi Arabian spine surgery market is the rising prevalence of spinal disorders, particularly among the aging population and individuals with sedentary lifestyles. Conditions such as degenerative disc disease, spinal deformities, and trauma-related injuries are becoming more common, leading to a growing need for surgical interventions. Additionally, the prevalence of obesity in Saudi Arabia has contributed to an increase in musculoskeletal disorders, further driving the demand for spine surgeries.

Technological advancements in the field of spine surgery are another critical factor propelling market growth. Minimally invasive spine surgery (MISS), which involves smaller incisions, less blood loss, faster recovery, and reduced risk of complications, is gaining popularity among both patients and healthcare providers. The introduction of robotic-assisted surgery and computer navigation systems has further enhanced surgical precision and outcomes, positioning Saudi Arabia as a leading destination for advanced spine care in the region.

Saudi Arabia's healthcare system is increasingly focusing on patient-centered care, particularly in relation to spine surgeries. A growing awareness of spine health,

combined with improved diagnostic capabilities, has empowered patients to seek earlier intervention for spinal disorders. Additionally, the demand for elective spine surgery is rising as people become more aware of the potential benefits of treatments such as minimally invasive spine surgery, which offers faster recovery and reduced post-operative pain.

Key Market Drivers

Growth in Healthcare Industry

The Saudi government's Vision 2030 initiative plays a pivotal role in transforming the country's healthcare sector, leading to increased investments in medical infrastructure. The healthcare policy in Saudi Arabia is designed to deliver comprehensive, equitable, and accessible healthcare to all individuals. Represented by the Ministry of Health (MoH), the government has established an integrated network of healthcare services across all regions. Healthcare in government facilities is provided free of charge to citizens, following a new health strategy tailored to meet the sector's evolving needs. In collaboration with regional councils, the MoH identifies healthcare needs, determines service locations, and sets appropriate levels of care based on geographical, demographic factors, and prevailing health conditions in each region. The provision of healthcare in government medical facilities is free for citizens and aligned with a strategic plan addressing the health sector's demands. This has resulted in the establishment of state-of-the-art hospitals and medical centers equipped with advanced technologies, which are crucial for performing spine surgeries. The expansion of specialized healthcare facilities dedicated to orthopedic and spinal care is enhancing the accessibility of spine surgery treatments across the country.

The focus on expanding healthcare infrastructure is enabling the development of more specialized spine surgery units within leading hospitals. These units are staffed with trained surgeons and equipped with cutting-edge tools for spinal treatments, including minimally invasive surgery techniques and robotic-assisted surgery, thereby improving the quality of care and expanding the capacity for treating patients with spinal conditions.

As Saudi Arabia's population grows and ages, the incidence of spinal disorders such as degenerative disc disease, spinal stenosis, scoliosis, and herniated discs is on the rise. Saudi Arabia is undergoing a demographic shift, with the population aged 60 and above projected to grow fivefold from 2 million (5.9% of the total population) in 2020 to 10.5 million (23.7%) by 2050. During the same period, the population of individuals aged 15

to 24 is expected to rise by 10%. Additionally, lifestyle changes, including increased sedentary behavior, poor posture, and obesity, have contributed to an uptick in musculoskeletal conditions, particularly those affecting the spine. This growing prevalence of spinal disorders has led to a higher demand for spine surgeries, which are often the most effective treatment for severe spinal conditions that cannot be addressed through non-surgical methods.

Surge in Technological Advancements

The Saudi Spine Society is a multidisciplinary scientific organization dedicated to advancing spine care across the Kingdom of Saudi Arabia. Its membership encompasses professionals from all fields involved in the prevention, treatment, and rehabilitation of spine-related conditions. The surge in technological advancements is a key driver of the growth in Saudi Arabia's spine surgery market. As the healthcare industry in the kingdom continues to evolve, the adoption of cutting-edge technologies in spine surgery has significantly enhanced the precision, safety, and effectiveness of procedures. These innovations are transforming the treatment of various spinal conditions, from degenerative diseases and deformities to trauma and tumors, making them crucial drivers of market expansion.

One of the primary technological advancements contributing to the growth of the spine surgery market is the increased use of minimally invasive surgery (MIS) techniques. These procedures, which involve smaller incisions, less tissue damage, and faster recovery times, have become increasingly popular among patients and healthcare providers. MIS technologies, such as robotic-assisted surgery and endoscopic spinal surgery, are providing surgeons with enhanced precision, allowing for more accurate and less invasive treatments. This not only leads to improved patient outcomes, including shorter hospital stays and reduced risk of complications, but also drives greater patient demand for these advanced procedures.

Robotic-assisted spine surgery, in particular, has gained significant traction in Saudi Arabia, driven by the country's growing focus on medical innovation and high-quality healthcare. Robotic systems, such as the Mazor X or Renaissance platforms, offer enhanced accuracy in surgical planning and execution, particularly for complex spinal procedures. These systems help surgeons to precisely place screws, reduce human error, and optimize the alignment of the spine, ensuring better long-term outcomes for patients. The introduction of these advanced technologies has positioned Saudi Arabia as a leader in the Middle East for spine surgery innovations, attracting medical tourists and fostering the growth of specialized healthcare centers.

Key Market Challenges

High Treatment Costs

One of the key challenges facing the Saudi Arabia spine surgery market is the high treatment costs associated with advanced surgical procedures and cutting-edge technologies. While the market is expanding due to the increasing prevalence of spinal disorders and advancements in surgical techniques, the financial barriers remain a significant concern for both patients and healthcare providers.

The cost of spine surgery procedures, particularly those involving minimally invasive techniques and robotic-assisted surgeries, can be substantially higher compared to traditional methods. These advanced technologies require specialized equipment, surgical tools, and expertise, all of which contribute to the overall cost of treatment. As a result, the financial burden on patients seeking these specialized treatments can be significant, especially for those without comprehensive insurance coverage or sufficient financial resources.

In addition to the direct surgical costs, the high expense of advanced spinal implants, such as customized or bioresorbable implants, adds to the financial challenge. These implants are designed to improve patient outcomes and reduce recovery time, but their cost is often beyond the reach of many patients. This factor may limit access to high-quality care for individuals who require surgery but are unable to afford the associated costs.

Key Market Trends

Rise in Medical Tourism

The Saudi government has made significant efforts to promote the country as a destination for medical tourism. Strategic healthcare partnerships with emerging markets (EMs) are poised to accelerate the growth of Saudi Arabia's medical tourism sector. A prime example of this is the memorandum of understanding (MoU) recently signed between Saudi Arabia and Morocco, which emphasizes collaboration in areas such as research, digital health, therapeutic development, pandemic preparedness, and preventive medicine. As part of the Vision 2030 initiative, which aims to diversify the economy and develop the healthcare sector, the government has focused on improving the quality of medical services and increasing accessibility for international patients.

This includes enhancing the quality of spine surgery services by fostering partnerships with international medical institutions, attracting top-tier spine surgeons, and expanding hospital facilities to cater to medical tourists.

Through these initiatives, Saudi Arabia has positioned itself as a competitive player in the global medical tourism market, drawing patients from the Middle East, North Africa, Asia, and even Western countries. The government's support for medical tourism, combined with a focus on spine surgery, is accelerating the country's reputation as a go-to destination for world-class healthcare services.

Saudi Arabia has invested heavily in developing state-of-the-art medical infrastructure, which is crucial for attracting medical tourists. Leading hospitals in the country are equipped with advanced technology and equipment to provide cutting-edge treatments for spinal disorders, such as robotic-assisted surgery, minimally invasive techniques, and 3D imaging systems. These technological advancements not only improve surgical outcomes but also minimize recovery time, making spine surgery in Saudi Arabia more appealing to international patients seeking faster and more effective treatments.

Segmental Insights

Product Insights

Based on Product, Spinal Fusion Devices have emerged as the fastest growing segment in the Saudi Arabia Spine Surgery Market in 2024. One of the primary drivers behind the growth of spinal fusion devices is the rising incidence of degenerative spinal conditions such as osteoarthritis, scoliosis, and spinal stenosis, which often require spinal fusion surgery. In these procedures, spinal fusion devices are used to stabilize the spine and promote the growth of bone between vertebrae, helping to alleviate pain and restore function. As the aging population in Saudi Arabia grows and the incidence of these conditions increases, there is a greater need for effective solutions like spinal fusion to address these medical challenges.

Advancements in spinal implant technology have further fueled the demand for spinal fusion devices. Modern spinal fusion devices, such as titanium and PEEK (polyetheretherketone) implants, offer superior strength, biocompatibility, and flexibility compared to older materials, ensuring better long-term outcomes for patients. Additionally, the development of minimally invasive surgical techniques, which use smaller incisions and cause less tissue damage, has made spinal fusion surgeries less invasive and more appealing to patients. These advancements have enhanced the

effectiveness of spinal fusion procedures, leading to increased adoption of these devices by both healthcare providers and patients.

Procedure Insights

Based on Procedure, Discectomy have emerged as the fastest growing segment in the Saudi Arabia Spine Surgery Market during the forecast period. Discectomy is widely recognized as a highly effective surgical procedure for treating herniated or bulging discs in the spine, particularly in patients experiencing chronic pain, numbness, or weakness in the arms or legs. As spinal disorders, particularly disc-related conditions, become more prevalent, discectomy has become the preferred treatment for addressing the underlying cause of pain and restoring spinal function. The procedure involves removing part or all of a damaged disc to relieve pressure on surrounding nerves, offering patients significant relief from symptoms and improved quality of life.

One of the primary reasons for the rapid growth of discectomy in Saudi Arabia is the widespread adoption of minimally invasive surgical techniques. Traditional discectomy procedures often required large incisions, resulting in longer recovery times and increased risks of complications. However, advancements in minimally invasive techniques, such as microdiscectomy, have made the procedure safer, faster, and less traumatic for patients. These innovations have contributed to higher success rates, reduced hospital stays, and quicker recovery periods, making discectomy a more attractive option for both patients and healthcare providers.

Regional Insights

Based on Region, Northern & Central have emerged as the dominating region in the Saudi Arabia Spine Surgery Market in 2024. The Northern and Central regions, particularly Riyadh, the capital, are home to some of the most advanced healthcare facilities in Saudi Arabia. These regions boast state-of-the-art hospitals and medical centers that are equipped with the latest technologies for spine surgery, including minimally invasive techniques, robotic-assisted surgery, and advanced imaging systems. This concentration of high-quality healthcare infrastructure has made these regions the primary destination for patients seeking specialized spine care.

Northern and Central Saudi Arabia attract a large number of skilled spine surgeons and medical professionals, many of whom are trained both locally and internationally. The availability of highly trained experts in spine surgery is a critical factor in the dominance of these regions, as it ensures patients receive world-class care. This has led to an

increased trust in these areas for complex spine surgeries, further driving the market growth.

Key Market Players

Stryker Corporation

Medtronic Plc

Johnson and Johnson Medical Saudi Arabia Limited

Globus Medical, Inc.

Orthofix Medical Inc.

Report Scope

In this report, the Saudi Arabia Spine Surgery Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Spine Surgery Market, By Product:

Spinal Fusion Devices

Spinal Decompression Devices

Non-Fusion Devices

Others

Saudi Arabia Spine Surgery Market, By Procedure:

Discectomy

Laminotomy

Foraminotomy

Corpectomy

Facetectomy

Saudi Arabia Spine Surgery Market, By Region:

Eastern

Western

Northern & Central

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Spine Surgery Market.

Available Customizations:

Saudi Arabia Spine Surgery 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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