

Spinal Surgery Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Device Type (Spinal Decompression, Spinal Fusion, Fracture Repair Devices, Arthroplasty Devices, Non-fusion Devices) By Surgery Type (Open v/s Minimally Invasive Surgery (MIS)) By End User (Hospitals & Clinics, Ambulatory Care Centers, Others), By Region and Competition

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Abstracts

Global Spinal Surgery Devices Market has valued at USD 12.30 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.21% through 2028. Spine surgery, also known as back surgery, is a procedure aimed at altering a patient's anatomy to address conditions such as herniated discs and provide pain relief. Different types of spinal surgeries exist, some more complex with longer recovery periods, while others are minimally invasive, allowing for quicker recovery. By utilizing specialized spine surgery products, these procedures can result in improved body structure, posture, reduced friction, and fewer orthopedic disabilities. The growing demand for orthopedic spine devices has led to strategic collaborations and new product launches by key players, expanding their portfolio and global presence. The spinal devices market is witnessing significant technological advancements, with the development of spine navigation tools to enhance clinical outcomes.

Key Market Drivers

Increasing Technological Advances in Spinal Surgery

The field of spinal surgery is on the cusp of a technological revolution, driven by remarkable advances in medical technology and surgical techniques. These innovations are poised to significantly increase the demand for spinal surgery devices in the near future. One key factor contributing to this rising demand is the development of minimally invasive surgical (MIS) approaches for spinal procedures. MIS techniques, enabled by cutting-edge technology such as robotic-assisted surgery and advanced imaging systems, offer patients faster recovery times, reduced pain, and smaller incisions. As these techniques become more widespread, the demand for specialized surgical instruments and devices designed for minimally invasive spine surgery is expected to surge. Innovations like 3D printing have also opened up new possibilities in the design and customization of spinal implants. Patient-specific implants tailored to an individual's anatomy can lead to improved surgical outcomes, reduce complications, and enhance patient satisfaction. This personalized approach is likely to boost the demand for advanced spinal surgery devices.

Increasing Burden of Obesity and Degenerative Spinal Conditions

The increasing prevalence of obesity and degenerative spinal conditions represents a significant public health challenge worldwide, and it is expected to drive a substantial increase in the demand for spinal surgery devices. Obesity places a considerable burden on the spine, as excess weight and increased pressure on the spinal column can lead to various spinal issues, including herniated discs, spinal stenosis, and degenerative disc disease. As the global obesity epidemic continues to grow, there is a corresponding rise in the number of individuals seeking surgical interventions to address these spinal problems. This surge in demand for spinal procedures to alleviate obesity-related spinal issues will require a corresponding increase in the use of spinal surgery devices such as spinal implants, artificial discs, and fixation systems.

Additionally, degenerative spinal conditions, often associated with the natural aging process, are becoming more prevalent due to the aging population in many parts of the world. These conditions, including osteoarthritis of the spine, spondylolisthesis, and facet joint degeneration, can lead to chronic pain and neurological deficits, necessitating surgical interventions. As the number of older adults increases, so too does the demand for spinal surgeries and the devices essential for these procedures.

In response to these healthcare challenges, medical device manufacturers are continually innovating and improving spinal surgery devices. Advanced materials, minimally invasive techniques, and patient-specific implants are among the innovations that can enhance the surgical experience and outcomes for patients with spinal

conditions. The rising burden of obesity and degenerative spinal conditions is expected to drive an increasing demand for spinal surgery devices. As healthcare systems and technology continue to evolve to meet the needs of a growing patient population, the spinal surgery device market is poised for significant growth in the coming years.

Rising Adoption Rate of Minimally-invasive Spinal Surgeries

The rising adoption rate of minimally-invasive spinal surgeries (MISS) is poised to significantly increase the demand for spinal surgery devices in the healthcare industry. These minimally-invasive techniques have been gaining momentum due to several compelling advantages over traditional open surgeries.

MISS procedures typically result in shorter hospital stays, quicker recovery times, and reduced post-operative pain compared to open surgeries. This patient-centric approach aligns with the broader healthcare trend of improving patient outcomes and experiences. As the medical community increasingly recognizes the benefits of MISS, there is a growing demand for specialized devices designed to facilitate these minimally-invasive procedures. These include specialized instruments, access systems, retractors, and navigation tools tailored to the unique requirements of MISS. Moreover, advancements in medical technology, such as robotic-assisted surgery and image-guided navigation systems, have further enhanced the precision and safety of minimally-invasive spinal surgeries. As these technologies become more integrated into clinical practice, there will be a corresponding increase in the demand for the devices that enable these advanced techniques. The growing popularity of MISS is also driven by the desire for reduced scarring and cosmetic benefits, making it an attractive option for patients. This patient preference, combined with the medical community's acknowledgment of improved surgical outcomes, will likely lead to a higher volume of MISS procedures in the future.

Rising Use of Biomaterials in Spinal Implants

The increasing use of biomaterials in spinal implants is poised to drive a significant rise in the demand for spinal surgery devices. Biomaterials, engineered materials with properties that make them compatible with biological systems, have revolutionized the field of spinal surgery by offering improved implant materials that enhance patient outcomes and longevity of spinal procedures.

One of the key factors contributing to the growing demand for spinal surgery devices incorporating biomaterials is their biocompatibility. Biomaterials are designed to interact

harmoniously with the human body, reducing the risk of adverse reactions or implant rejection. This biocompatibility translates into better patient comfort, reduced complications, and improved overall surgical success rates, compelling healthcare providers to opt for biomaterial-based spinal implants. Furthermore, biomaterials are prized for their ability to mimic the mechanical properties of natural bone, promoting integration and stability at the implant site. This characteristic is particularly crucial in spinal surgery, where implants must bear the weight and stresses of the spine. As surgeons increasingly recognize the advantages of biomaterial-based spinal devices, the demand for these innovative solutions is expected to surge. The increasing use of biomaterials in spinal implants offers numerous advantages, including biocompatibility and mechanical properties that mimic natural bone. As surgeons and healthcare providers seek to optimize patient outcomes and reduce complications, the demand for spinal surgery devices incorporating biomaterials is anticipated to grow significantly, making them a crucial component of the evolving landscape of spinal surgery.

Key Market Challenges

Stringent Regulatory Process for New Product Approvals

The stringent regulatory process for new product approvals can potentially have a dampening effect on the demand for spinal surgery devices. The rigorous evaluation and testing required for regulatory approval can significantly extend the time it takes for new spinal surgery devices to reach the market. This delay may cause potential users, including healthcare facilities and surgeons, to opt for existing devices that are already approved and readily available. In rapidly evolving medical fields like spinal surgery, delays in accessing the latest innovations can be a drawback. Meeting regulatory requirements often involves substantial financial investments in clinical trials, testing, and documentation. These increased development costs can lead to higher prices for new spinal surgery devices when they finally hit the market. This cost burden can deter healthcare facilities from adopting newer, potentially more effective technologies, especially when they already have established solutions that are more cost-effective.

Stringent regulatory processes can deter manufacturers from investing in the development of new spinal surgery devices due to the significant time and financial commitments required. This limitation in product variety can restrict healthcare providers' options, making it challenging to find devices that cater to specific patient needs or surgical preferences. Healthcare institutions may prefer to stick with devices that have a proven track record and established safety profiles, especially if they are concerned about the potential risks associated with newly approved products. This risk

aversion can slow down the adoption of innovative spinal surgery devices even after they receive regulatory clearance.

Expensive Treatment Procedures

The high cost associated with spinal surgery procedures is anticipated to be a significant factor in decreasing the demand for spinal surgery devices. Spinal surgery procedures, particularly complex and invasive ones, can impose a substantial financial burden on healthcare systems. These costs encompass not only the surgical procedure itself but also pre-operative and post-operative care, including hospitalization, imaging, rehabilitation, and ongoing monitoring. As healthcare systems seek to manage costs, there may be reluctance to invest in expensive surgical procedures and the associated devices.

Access to spinal surgery devices and procedures is often dictated by insurance coverage and reimbursement policies. High costs can result in limited insurance coverage, leaving patients responsible for a significant portion of the expenses. This financial barrier can discourage individuals from pursuing spinal surgery, even when it is medically necessary. Given the high cost and potential risks associated with spinal surgery, both patients and healthcare providers may favor conservative treatment options when possible. These may include physical therapy, medication, and lifestyle modifications. This preference for non-surgical approaches can reduce the demand for spinal surgery devices. Advancements in non-surgical treatments, such as minimally invasive techniques and regenerative medicine, offer alternatives to traditional spinal surgery. These alternatives may be perceived as more cost-effective and less invasive, influencing patients and healthcare providers to explore these options instead.

Key Market Trends

Increasing Affordability of Spinal Fusion Surgeries

The increasing affordability of spinal fusion surgeries is anticipated to have a notable impact on boosting the demand for spinal surgery devices. As healthcare systems and insurance providers strive to make medical treatments more affordable and accessible, more individuals have the opportunity to undergo spinal fusion surgeries. This broader access to healthcare can lead to a larger pool of potential patients seeking spinal surgery solutions. Affordable healthcare options, including insurance plans with lower out-of-pocket expenses, can alleviate the financial burden on patients considering spinal fusion surgeries. When the cost of the procedure becomes more manageable,

individuals may be more willing to undergo the surgery and invest in the necessary devices.

The increasing affordability of spinal fusion surgeries is anticipated to significantly bolster the demand for spinal surgery devices. Spinal surgery, once considered a luxury due to its exorbitant costs, is now becoming increasingly accessible for a larger patient population. This surge in affordability can be attributed to a variety of factors, including technological advancements, competitive pricing among manufacturers, and the growing acceptance of minimally invasive surgical procedures. The cost-efficiency of these procedures not only broadens the potential patient base, but also encourages hospitals and clinics to invest in advanced spinal surgery devices. Furthermore, insurance providers are beginning to recognize the long-term cost benefits of successful spinal surgeries, and are increasingly covering these procedures. This trend, combined with the rising prevalence of spinal disorders due to aging populations and lifestyle changes, is expected to further propel the demand for spinal surgery devices. Ultimately, the democratization of spinal fusion surgeries, facilitated by their increasing affordability, has the potential to drastically transform the landscape of the spinal surgery devices market.

Increase In Demand for Spine Biologics

The global increase in demand for spine biologics is predicted to significantly boost the need for advanced spinal surgery devices. Spine biologics, which are substances used during spine surgeries to promote bone growth and facilitate spinal fusion, play a crucial role in helping patients recover from various spinal conditions. This higher demand for spine biologics is expected to lead to a parallel rise in the number of spinal surgeries, driving the requirement for more innovative surgical devices.

Moreover, the ageing population worldwide, which is at a higher risk of developing degenerative disc disease, along with the increasing prevalence of obesity, which exerts additional stress on the spine, further contribute to the escalating need for spinal procedures. These factors underscore the necessity for the availability of robust, cutting-edge spinal surgery devices that can effectively address the complex challenges posed by various spinal conditions.

Segmental Insights

Device Type Insights

Based on the device type, the market is segmented into different types of devices, including Spinal Decompression, Spinal Fusion, Fracture Repair Devices, Arthroplasty Devices, and Non-fusion Devices. Spinal fusion devices have maintained the highest market share in 2022, primarily due to the increase in spinal fusion surgeries. The advancements in spine fusion surgery, with or without internal fixation, have contributed to significant growth. For example, in May 2022, a Carlsbad-based company developed a personalized device that enhances spinal surgery, offering improved mobility and pain reduction for individuals suffering from various types of scoliosis. Additionally, the expanded indications for spine fusions have also played a significant role in driving demand.

Fracture Repair Devices are expected to exhibit the fastest growth during the forecast period, driven by the growing prevalence of spine disorders and the preference for minimally invasive surgery among patients. Furthermore, several key players are actively seeking regulatory approvals to expand their geographical presence, which is anticipated to further fuel the growth of this segment. For instance, in September 2020, IZI Medical, a US-based producer of interventional radiology devices, obtained CE Mark authorization for the Kiva Vertebral Compression Fracture (VCF) Treatment System in Europe.

Surgery Type Insights

Based on the surgery type segment, the minimally invasive surgery segment is projected to experience a significant increase in revenue compound annual growth rate (CAGR) over the forecast period. This can be attributed to the growing preference among patients for minimally invasive procedures, which offer numerous advantages. These include fewer surgical scars, shorter hospital stays, faster recovery periods, reduced post-operative pain, and lower risk of complications. Additionally, the availability of cost-effective procedures and the accessibility of minimally invasive surgeries in outpatient departments contribute to the rising popularity of this approach. The continuous advancements in technology and surgical techniques, such as robotic-assisted surgery and image-guided procedures, further facilitate the adoption of minimally invasive surgery. With its proven benefits and favorable outcomes, minimally invasive surgery continues to emerge as a promising and sought-after option for patients and healthcare providers alike.

Regional Insights

In 2022, North America emerged as the dominant force in the global spinal surgery

devices market, a trend projected to persist throughout the forecast period from 2024 to 2028. With the United States at the helm, boasting the largest market worldwide, the region benefits from a substantial patient pool. The growth of the spinal surgery devices market is further propelled by the continuous introduction of new products and the forging of commercialization agreements among key manufacturers and other companies. A noteworthy example is the 510k clearance granted by the United States Food and Drug Administration on June 7, 2022, for Aurora Spine's Interbody fusion device, demonstrating ongoing innovation. This device, known as the DEXA SOLO-L ALIF, empowers doctors to customize implants based on the density and quality of patients' bone, enhancing surgical outcomes.

Moreover, future growth in the global spinal surgery devices market is anticipated to be fueled by Europe and the Asia-Pacific region. Factors contributing to this growth include government support, characterized by streamlined approval processes for new product launches and favorable reimbursement policies in European and Asian countries. Additionally, the market's popularity and high adoption rate are driven by the availability of diverse options, providing patients and healthcare professionals with a wide range of choices. These factors are expected to further propel the growth of the spinal surgery devices market, solidifying its position as a vital component of the healthcare industry.

Key Market Players

Medtronic PLC

Styker Corporation

Johnson and Johnson (DePuy Synthes)

Globus Medical Inc.

Alphatec Spine Inc.

ZimVie Inc.

Orthofix Holdings Inc.

Abbott Laboratories, Inc.

Boston Scientific Corporation

B. Braun Melsungen AG (Aesculap Inc.)

Report Scope:

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

Spinal Surgery Devices Market, By Device Type:

Spinal Decompression

Spinal Fusion

Fracture Repair Devices

Arthroplasty Devices

Non-fusion Devices

Spinal Surgery Devices Market, By Surgery Type:

Open

Minimally Invasive Surgery {MIS}

Spinal Surgery Devices Market, By End User:

Hospital & Clinics

Ambulatory Care Center

Others

Spinal Surgery Devices Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Spinal Surgery Devices Market.

Available Customizations:

Global Spinal Surgery 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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