

# **Surgical Drainage Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented by Product (Active, Passive), By Application (Thoracic & Cardiovascular Surgeries, Neurosurgical Procedures, Abdominal Surgery, Orthopedics, Others), By End-use (Hospitals, Ambulatory surgical centers, Clinics), By Region, By Competition**

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## **Abstracts**

The Global Surgical Drainage Devices Market, valued at USD 2.52 Billion in 2022, is poised for substantial growth in the forecast period, projecting a robust CAGR of 6.31% through 2028. These medical devices, known as surgical drains, serve the vital function of facilitating the drainage of fluid and/or gas from bodily cavities or wounds. Surgical drains typically take the form of tubes strategically placed near surgical wounds in post-operative patients to effectively remove substances such as pus, blood, or other fluids, thereby preventing their accumulation within the body. These drains function continuously, helping to maintain an optimal pressure gradient in the affected areas.

Surgical drains play a crucial role in the healing process by aiding in the removal of inflammatory mediators, pathogens, foreign objects, and necrotic tissue. By doing so, they contribute to the prevention of complications that may arise during recovery. Moreover, surgical drains enable healthcare professionals to easily sample fluid throughout the healing journey, facilitating the monitoring of potential issues or complications.

In essence, the Global Surgical Drainage Devices Market is on a trajectory of significant

growth due to the indispensable role played by surgical drains in post-operative care. Their ability to efficiently manage fluid drainage, prevent complications, and support the healing process underscores their importance in the field of healthcare.

## Key Market Drivers

### Rising Surgical Procedures

As the number of surgical procedures grows, so does the need for surgical drainage devices. These devices are essential for managing post-operative fluid accumulation, which is a common occurrence after many surgeries. Surgeons and healthcare providers rely on these devices to ensure the proper healing and recovery of patients. Surgical procedures span a wide range of medical specialties, including orthopedics, cardiovascular, general surgery, gynecology, and more. Each surgical specialty may require specific types of drainage devices tailored to the unique needs of the procedure. The diversity of surgical procedures thus leads to a broader demand for a variety of drainage devices, driving market growth. The rise of minimally invasive surgical techniques has increased the overall number of surgeries performed. MIS techniques often result in smaller incisions and less tissue damage, but they can still require drainage to manage fluid buildup. Consequently, the adoption of MIS has contributed to the increased demand for specialized minimally invasive drainage devices. Emergency surgeries, such as trauma surgeries or urgent interventions, are on the rise due to accidents and unforeseen medical conditions. In these cases, quick and effective drainage solutions are essential to prevent complications and support patient recovery. As the global population ages, there is a higher incidence of age-related health issues that require surgical intervention. Elderly patients often have comorbidities and may require multiple surgeries over time. The need for surgical drainage devices in these cases is pronounced, as post-operative care becomes more critical. Chronic diseases, such as diabetes and cardiovascular diseases, often require surgical procedures to manage complications. Patients with chronic conditions may undergo surgeries regularly, contributing to the sustained demand for surgical drainage devices.

### Technological Advancements

Advancements in materials science have led to the development of more biocompatible and durable materials for surgical drainage devices. These materials reduce the risk of tissue irritation and allergic reactions while improving the overall performance and longevity of the devices. Enhanced materials contribute to the market's growth by increasing the acceptance and adoption of drainage devices. Technological innovations

have facilitated the growth of minimally invasive surgical techniques (MIS), which require smaller incisions compared to traditional open surgeries. MIS techniques are less invasive and typically result in shorter hospital stays and quicker recoveries. This shift has increased the demand for specialized minimally invasive drainage devices that can effectively manage fluid accumulation through smaller incisions. Improved imaging and visualization technologies, such as intraoperative ultrasound and endoscopy, aid surgeons in assessing the surgical site and the need for drainage. These technologies help in precise placement of drainage devices, reducing the risk of complications and enhancing patient outcomes. The integration of smart technology into surgical drainage devices allows for real-time monitoring and data collection. Smart drains can measure and transmit information about fluid output, which aids healthcare providers in making timely decisions regarding drainage management. This technology improves patient care and reduces the need for manual monitoring, driving the adoption of such devices. Technology has enabled the design of drainage devices with features that reduce the risk of infections. Antimicrobial coatings and materials with antimicrobial properties can help mitigate the risk of bacterial colonization on the device, thereby minimizing the chances of post-operative infections. The integration of telemedicine and remote monitoring solutions into healthcare systems has impacted the surgical drainage devices market. Healthcare providers can remotely monitor patients' drainage output and provide guidance, reducing the need for frequent in-person follow-ups and improving patient convenience.

### Favorable Regulatory Environment

Rigorous regulatory standards and requirements help ensure that surgical drainage devices meet high-quality and safety standards. Manufacturers are compelled to adhere to strict quality control processes, leading to the production of reliable and safe products. This instills confidence among healthcare providers and encourages them to adopt these devices. A favorable regulatory environment expedites the process of market entry for manufacturers. Regulatory approvals, such as CE Marking in Europe or FDA clearance in the United States, are essential for marketing medical devices. A streamlined regulatory process can reduce the time and cost associated with obtaining these certifications, allowing manufacturers to bring their products to market more quickly. Regulatory agencies often require surgical drainage devices to adhere to industry standards and guidelines. Manufacturers must invest in research and development to ensure their devices comply with these standards, fostering innovation and driving the development of improved drainage technologies. Regulatory bodies mandate post-market surveillance and adverse event reporting. This requirement ensures that any safety concerns or issues with surgical drainage devices are promptly

identified and addressed. Manufacturers must monitor their products in the field and respond to safety concerns, ultimately leading to safer devices. Regulatory approval signifies that a surgical drainage device has met rigorous safety and efficacy standards. This certification enhances the credibility and trustworthiness of the device in the eyes of healthcare providers, facilitating its adoption and use in clinical settings. Favorable regulatory environments that align with international standards enable manufacturers to access global markets more easily. A device that complies with recognized regulatory standards in one country is often accepted in other regions, reducing barriers to entry into new markets. Some regulatory agencies support innovation and research in the medical device industry through grants and funding programs. These initiatives can incentivize manufacturers to invest in research and development to create advanced and more effective surgical drainage devices.

## Key Market Challenges

### Regulatory Hurdles

Obtaining regulatory approvals for surgical drainage devices can be a lengthy and intricate process. Manufacturers must submit comprehensive documentation, conduct extensive testing, and meet stringent quality and safety standards. The time and resources required for approvals can delay product launches and market entry, impeding growth. Complying with regulatory requirements can be expensive. Manufacturers must invest in research, testing, quality control, and documentation. The associated costs may be prohibitive for smaller companies, reducing competition and innovation in the market. Different countries and regions often have distinct regulatory frameworks and standards for medical devices. Navigating these variations can be challenging and costly for manufacturers, especially when they seek to expand their products globally. This variability can lead to delays in market entry and added expenses. Regulatory agencies require continuous monitoring of medical devices in the market. Manufacturers must report adverse events and conduct post-market surveillance, which can be resource-intensive and add ongoing costs to the operation. Due to the regulatory scrutiny, some manufacturers may become risk-averse and hesitant to innovate or introduce new features to their products. This can slow down the development and adoption of advanced surgical drainage devices, limiting market growth. For new entrants or smaller companies, the regulatory requirements can be significant barriers to entry. The time and costs associated with meeting these hurdles can discourage competition and limit the availability of innovative devices.

### Intense Competition

Fierce competition can lead to price wars, with manufacturers reducing prices to gain market share. While this benefits healthcare providers and patients in terms of cost savings, it can negatively impact the revenue and profitability of manufacturers. Reduced prices can also limit the ability of manufacturers to invest in research and development, potentially hindering the introduction of advanced and innovative products. As competition drives down prices, manufacturers may experience thinner profit margins. This can limit their ability to reinvest in their businesses, expand production capacity, or engage in marketing and promotional activities. In turn, this may slow down the overall market growth. Intense competition may incentivize some manufacturers to create copycat products that mimic successful designs or features of existing surgical drainage devices. While this can lead to more choices for healthcare providers, it may discourage innovation and differentiation among manufacturers, potentially stifling market growth. In a highly competitive market, manufacturers may rush to introduce new versions or models of surgical drainage devices. This rapid turnover can create challenges for healthcare providers who must constantly adapt to new product offerings. It may also lead to fragmentation in the market and complicate supply chain management. Intense competition can lead to market saturation, where multiple manufacturers offer similar products with little differentiation. In such a scenario, it becomes increasingly difficult for new entrants to gain a foothold, potentially limiting market expansion. To remain competitive, manufacturers may look for ways to cut production costs. While cost-cutting measures can enhance competitiveness, they may compromise product quality and safety. This can lead to regulatory issues, product recalls, and damage to a manufacturer's reputation, ultimately hindering market growth. Smaller manufacturers or startups may find it challenging to compete with well-established companies in a highly competitive market. This can discourage innovation and limit the entry of new, potentially disruptive technologies or approaches to surgical drainage.

## Key Market Trends

### Minimally Invasive Approaches

Minimally invasive surgery (MIS) techniques, such as laparoscopy and endoscopy, require specialized surgical drainage devices designed for smaller incisions and precise drainage. This has led to a growing demand for minimally invasive drainage solutions, driving market growth. Minimally invasive approaches are associated with reduced trauma to surrounding tissues, resulting in fewer post-operative complications. However, proper drainage is still crucial in these procedures to prevent fluid

accumulation and infections. Surgical drainage devices tailored for MIS enhance patient safety, leading to their increased adoption. Minimally invasive surgeries often result in shorter hospital stays compared to traditional open surgeries. Efficient and effective drainage devices play a critical role in managing post-operative fluid accumulation, facilitating quicker patient recovery, and reducing healthcare costs. Minimally invasive approaches prioritize patient comfort and faster recuperation. The use of minimally invasive drainage devices that are less obtrusive and offer enhanced mobility contributes to patient-centered care, which is a growing trend in modern healthcare. The rise of minimally invasive surgery has spurred technological innovations in surgical drainage devices. Manufacturers are developing devices with features like precise control mechanisms, compatibility with MIS instruments, and ergonomic designs, all of which enhance their appeal to healthcare providers. Minimally invasive techniques are being applied to an increasing number of surgical specialties, including gynecology, urology, orthopedics, and cardiovascular surgery. As these specialties adopt MIS, the demand for specialized drainage devices continues to grow, diversifying the market. Minimally invasive drainage devices contribute to the overall success of MIS procedures by effectively managing fluid accumulation while minimizing discomfort. This, in turn, promotes patient satisfaction and faster recovery, reinforcing the adoption of minimally invasive approaches. While the initial equipment costs for minimally invasive surgery can be higher, the shorter hospital stays and reduced complication rates can result in cost savings for healthcare systems. This cost-efficiency further encourages the adoption of minimally invasive approaches, including the use of specialized drainage devices. As healthcare infrastructure improves in emerging markets, the adoption of minimally invasive techniques and associated drainage devices is on the rise. This expansion of minimally invasive surgeries contributes to the overall growth of the global surgical drainage devices market.

### Smart and Connected Drainage Devices

Smart drainage devices can monitor and transmit real-time data, such as fluid output and pressure, to healthcare providers and remote monitoring systems. This capability allows for proactive patient care, early detection of issues, and timely interventions, ultimately improving patient outcomes. Connected devices provide an added layer of safety by continuously monitoring drainage parameters. In the event of anomalies or sudden changes in fluid output, healthcare providers can be alerted promptly, enabling them to take immediate action to prevent complications, such as fluid collection or infection. Traditional manual monitoring of drainage devices is labor-intensive and may be prone to errors. Smart devices automate data collection, reducing the burden on healthcare staff and minimizing the risk of inaccuracies in recording drainage data. The

real-time data and insights provided by smart drainage devices enable healthcare providers to make more informed decisions regarding drainage management. This can lead to more efficient and personalized patient care, ensuring that drainage levels are kept within the desired range. Smart drainage devices can be integrated with telemedicine platforms, allowing healthcare providers to remotely monitor patients' post-operative progress. This integration aligns with the growing adoption of telehealth and telemedicine services, expanding the reach of healthcare professionals and improving patient convenience. The data collected by connected drainage devices can be analyzed using data analytics and artificial intelligence (AI). This enables the identification of patterns and trends in patient recovery, which can be used for predictive purposes. Predictive analytics can help healthcare providers anticipate complications and adjust drainage management accordingly. Smart devices facilitate more efficient resource allocation by streamlining the monitoring process and enabling healthcare providers to focus their attention on patients who require immediate intervention. This can lead to cost savings and improved resource utilization in healthcare settings. Connected drainage devices contribute to patient-centered care by offering continuous monitoring and quicker response times to patient needs. This enhances the overall patient experience during post-operative care and may lead to higher patient satisfaction rates. Regulatory agencies are recognizing the potential benefits of smart and connected medical devices in improving patient safety. Regulatory bodies may encourage the adoption of such devices, creating a favorable environment for manufacturers and stimulating market growth. Manufacturers offering smart and connected drainage devices gain a competitive advantage by providing advanced solutions that meet the evolving needs of healthcare providers and patients. This can lead to increased market share and revenue growth.

## Segmental Insights

## Application Insights

Based on the Application, the thoracic and cardiovascular surgeries segment is anticipated to witness substantial market growth throughout the forecast period. Thoracic and cardiovascular surgeries, such as open-heart procedures and vascular surgeries, are intricate and often involve the manipulation of vital structures. The increasing prevalence of heart-related conditions, including coronary artery disease and valvular disorders, has led to a higher volume of these surgeries. As a result, the demand for specialized surgical drainage devices in these surgical fields has also increased. Thoracic and cardiovascular surgeries typically require meticulous post-operative care, including the management of fluid accumulation. Surgical drainage

devices play a critical role in these procedures by facilitating the removal of excess fluids from the surgical site. Their efficient use is essential in preventing complications and ensuring patient recovery. The complex nature of thoracic and cardiovascular surgeries demands precision and specialized tools and devices. Surgical drainage devices designed specifically for these procedures must meet stringent quality and safety standards. The development and adoption of such specialized devices contribute to the growth of the surgical drainage devices market. Minimally invasive approaches are increasingly utilized in thoracic and cardiovascular surgeries. These techniques require drainage devices tailored to smaller incisions and less invasive procedures. The demand for specialized minimally invasive drainage solutions has grown in parallel with the adoption of these techniques. Post-operative complications, such as pleural effusion or hematoma formation, can occur after thoracic and cardiovascular surgeries. Surgical drainage devices are essential for managing these complications effectively. The ability to prevent and treat complications is crucial for patient safety, driving the demand for drainage devices. The complexity of thoracic and cardiovascular surgeries has led to innovations in surgical drainage device design. Manufacturers are developing devices with features such as precise control mechanisms, compatibility with surgical instruments, and tailored drainage solutions to meet the unique demands of these procedures. The growth of interventional cardiology and minimally invasive cardiac procedures, such as angioplasty and stent placement, has increased the demand for surgical drainage devices that are suitable for these less invasive approaches. This trend supports market growth in the cardiovascular segment.

## End User Insights

Based on the End User segment, the Hospitals segment has been the dominant force in the market. Hospitals are among the primary end-users of surgical drainage devices. Their purchasing decisions significantly impact the market's growth. As hospitals expand their surgical services and perform a higher volume of procedures, the demand for surgical drainage devices increases. Hospitals prioritize patient care and safety. Surgical drainage devices are essential tools in post-operative care, helping manage fluid accumulation, prevent complications, and promote patient recovery. Hospitals rely on these devices to ensure the well-being of their patients, which drives their consistent use and adoption. Hospitals aim to minimize post-operative complications, such as infections and fluid accumulation. Surgical drainage devices are key instruments in achieving this goal. Their effective use can reduce the incidence of complications, resulting in shorter hospital stays and better patient outcomes. Hospitals are at the forefront of adopting new surgical techniques and technologies. As minimally invasive and robotic-assisted surgeries become more common, hospitals seek specialized



drainage devices designed for these procedures. This drives innovation and the development of advanced surgical drainage solutions. The use of surgical drainage devices has become a standard of care in many surgical specialties. Hospitals follow established guidelines and best practices that recommend the use of these devices, contributing to their consistent demand and market growth. Surgeons and other healthcare providers have preferences for specific surgical drainage devices based on their experience and the devices' efficacy. Hospitals often accommodate these preferences, leading to the continued use and purchase of preferred devices.

## Regional Insights

North America, specifically the Surgical Drainage Devices Market, dominated the market in 2022, primarily due to North America, particularly the United States, has one of the highest healthcare expenditure rates globally. The substantial investment in healthcare infrastructure, facilities, and advanced medical technologies, including surgical drainage devices, drives market growth. North America is a hub for medical device innovation and research. The region is characterized by a strong focus on developing cutting-edge surgical technologies and devices, which includes the continuous improvement of surgical drainage devices. North America has a sizable patient pool, including a significant elderly population. Age-related health conditions, such as cardiovascular diseases and cancer, often necessitate surgical procedures that require the use of surgical drainage devices. The region witnesses a high volume of surgical procedures, both elective and non-elective. These surgeries often require the use of surgical drainage devices to manage post-operative complications, thereby increasing demand.

## Key Market Players

Acelity L.P Inc.

Teleflex Incorporated.

Cardinal Health.

Medtronic PLC.

Cook Medical.

Stryker Corporation.

C.R. Bard.

Ethicon, Inc.

B. Braun Melsungen.

Medela A G

### Report Scope:

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

#### Surgical Drainage Devices Market, By Product:

Active

Passive

#### Surgical Drainage Devices Market, By Application:

Thoracic & Cardiovascular Surgeries

Neurosurgical Procedures

Abdominal Surgery

Orthopedics

Others

#### Surgical Drainage Devices Market, By End Use:

Hospitals

Ambulatory surgical centers

Clinics

Surgical Drainage 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 Surgical Drainage Devices Market.

## Available Customizations:

Global Surgical Drainage 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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## **16. STRATEGIC RECOMMENDATIONS**

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