

Surgical Tables Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Product Type (General Surgical Tables, Specialty Surgical Tables, Radiolucent Surgical Tables, Pediatric Surgical Tables), By Type (Powered, Non-powered), By Material (Metal, Composite), By End-use (Hospitals, Ambulatory Surgery Centers, Specialty Clinics & Trauma Centers), By Region, By Competition

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Abstracts

Global Surgical Tables Market is anticipated to project impressive growth in the forecast period. The global surgical tables market is a segment of the larger medical equipment industry and plays a vital role in the healthcare sector. Surgical tables, also known as operating tables or operating room tables, are specialized tables designed to support patients during surgical procedures while allowing surgeons and medical staff to work comfortably and efficiently.

Key Market Drivers

Increasing Healthcare Expenditure

The global healthcare landscape is undergoing a significant transformation, with increasing healthcare expenditure emerging as a key driver of growth in various healthcare sectors, including the surgical tables market. As nations around the world prioritize improved healthcare infrastructure and access to quality medical services, the demand for advanced surgical equipment, such as surgical tables, is on the rise.

As populations grow and age, the demand for healthcare services naturally increases. This demographic shift necessitates investments in healthcare infrastructure, including hospitals and surgical facilities. Consequently, healthcare providers are allocating substantial budgets to meet the rising demand for surgical procedures, thereby driving the demand for surgical tables.

The healthcare industry is witnessing continuous advancements in medical technology. This progress translates into the development of innovative surgical procedures and techniques that require specialized equipment. Modern surgical tables are equipped with state-of-the-art features, including motorized adjustments, integrated imaging capabilities, and enhanced ergonomic designs. The need for these cutting-edge technologies encourages healthcare institutions to allocate funds for upgrading their surgical equipment.

Healthcare providers prioritize patient care and safety. Surgical tables play a crucial role in ensuring a patient's comfort and stability during surgery. Advanced surgical tables offer greater flexibility, allowing surgeons to position patients optimally for various procedures, reducing the risk of complications. As healthcare expenditure increases, hospitals are more inclined to invest in patient-centric equipment, thereby boosting the demand for high-quality surgical tables.

The growing popularity of minimally invasive surgical techniques has revolutionized healthcare. These procedures offer faster recovery times and reduce post-operative pain for patients. However, they also require specialized equipment, including surgical tables that can accommodate robotic systems and laparoscopic instruments. Healthcare facilities are willing to invest in such tables to stay competitive and offer advanced surgical options.

Emerging economies are witnessing substantial growth in their healthcare infrastructure. Governments in these regions are committing significant resources to improve healthcare accessibility and quality. This includes building new hospitals and surgical centers equipped with the latest surgical equipment, which in turn drives the demand for surgical tables.

In many regions, healthcare facilities are required to adhere to stringent regulatory standards and certifications. This includes ensuring that surgical equipment meets specific safety and quality criteria. Increasing healthcare expenditure allows for investments in compliant and certified surgical tables, ensuring patient safety and

regulatory compliance.

Technological Advancements

In the ever-evolving world of healthcare, technological advancements are playing a pivotal role in reshaping medical practices and improving patient outcomes. One significant area that has benefitted from these advances is the surgical tables market. Surgical tables, also known as operating tables, are no longer just stationary platforms for patients; they have transformed into sophisticated pieces of equipment designed to enhance surgical precision and patient safety.

Modern surgical tables are far more than static surfaces. They are equipped with advanced technologies that allow for precise adjustments in terms of height, angle, and lateral tilt. These features enable surgeons to optimize their positions for different procedures, ensuring maximum comfort and minimizing strain during long surgeries. The result is improved precision and reduced fatigue, ultimately leading to better patient outcomes.

One of the most significant technological leaps in surgical tables is the integration of imaging capabilities. Many surgical tables are now compatible with fluoroscopy, C-arm X-rays, and other imaging modalities. This enables real-time imaging during surgery, which is invaluable for procedures such as orthopedic surgeries, vascular interventions, and minimally invasive surgeries. Surgeons can obtain live images to guide their actions with precision, resulting in safer and more effective procedures.

Technological advancements have made surgical tables more versatile, accommodating a wide range of surgical specialties. Tables can be customized with specialized attachments and accessories to support different procedures, from general surgery to neurosurgery and cardiology. The ability to adapt to various surgical requirements has expanded the market's appeal to healthcare facilities worldwide.

The rise of robotic-assisted surgery has necessitated the development of surgical tables that can seamlessly integrate with robotic systems. These tables are designed to accommodate robotic arms and instruments, providing a stable and adaptable platform for precision-controlled procedures. As robotic surgery becomes more prevalent, the demand for compatible surgical tables is increasing.

Remote control and connectivity features are becoming standard in modern surgical tables. Surgeons and operating room staff can adjust table settings, monitor patient

vitals, and communicate seamlessly during surgery. This enhances efficiency and coordination in the operating room, contributing to better patient care and shorter procedure times.

Technological advancements have also led to improvements in safety and infection control. Some surgical tables are equipped with anti-microbial surfaces, which help prevent the spread of infections. Additionally, safety features such as fail-safe mechanisms and collision avoidance systems have become more sophisticated, minimizing the risk of accidents during surgery.

Surge in Minimally Invasive Surgery

The landscape of surgical procedures is undergoing a significant transformation with the increasing popularity of minimally invasive surgery (MIS). As more patients and surgeons recognize the benefits of these less invasive techniques, the demand for specialized equipment is surging. One of the essential components driving the success of MIS is the surgical table.

Minimally invasive surgery requires specialized equipment and techniques that differ from traditional open surgery. Surgeons use smaller incisions and rely on video-assisted technology to navigate and visualize internal structures. Surgical tables designed for MIS are equipped with features that allow for precise positioning and stability during these procedures. They can accommodate robotic surgical systems, laparoscopic instruments, and the necessary imaging equipment, providing the versatility needed for complex minimally invasive surgeries.

In MIS, the patient's position is crucial for the success of the procedure. Surgical tables designed for minimally invasive surgeries offer precise control over patient positioning, including adjustments for tilt, rotation, and height. This flexibility allows surgeons to access the surgical site accurately, maintain patient stability, and ensure proper alignment of instruments—a crucial aspect of minimally invasive surgery's success.

Minimally invasive surgery is renowned for its benefits, including smaller incisions, less tissue damage, reduced pain, and faster recovery times. The surgical table plays a pivotal role in achieving these outcomes by facilitating optimal patient positioning and ensuring that the patient remains in the required position throughout the procedure. As more patients and surgeons opt for MIS, the demand for surgical tables that support these techniques is on the rise.

Real-time imaging is essential for many minimally invasive procedures. Surgical tables designed for MIS are often equipped with integrated imaging capabilities, such as fluoroscopy and C-arm compatibility. This allows surgeons to visualize the surgical site and guide their instruments with precision. The need for advanced imaging in MIS further drives the demand for specialized surgical tables that can seamlessly integrate these technologies.

Minimally invasive surgeries can be time-consuming, requiring surgeons to work with precision for extended periods. Specialized surgical tables are designed to enhance surgeon comfort and reduce fatigue, ultimately improving surgical outcomes. Ergonomically designed tables with motorized adjustments ensure that surgeons can maintain optimal posture and positioning throughout the procedure.

As the adoption of minimally invasive surgery continues to grow globally, the demand for surgical tables tailored to these procedures is poised to increase significantly. This creates opportunities for manufacturers to develop and market advanced surgical tables that cater specifically to the needs of MIS, further expanding the global surgical tables market.

Market Competition and Innovation

In the ever-evolving landscape of healthcare, competition and innovation are driving forces that push the boundaries of medical technology and patient care. The global surgical tables market is no exception, where market competition and continuous innovation are shaping the future of surgical equipment.

Market competition compels surgical table manufacturers to constantly upgrade their product offerings. Companies seek to outperform rivals by developing tables with advanced features, superior ergonomics, and cutting-edge technologies. This results in a diverse range of surgical tables catering to various specialties, making it easier for healthcare facilities to find a tailored solution for their specific needs.

Competition fosters customization and specialization in the surgical tables market. Manufacturers recognize that different surgical procedures require specific table configurations and features. As a result, they work closely with healthcare providers to create bespoke solutions that address unique surgical requirements. This level of customization enhances patient care and safety, ultimately boosting demand.

To stand out in a competitive marketplace, manufacturers are compelled to maintain

high standards of quality and durability. Surgical tables must meet stringent regulatory requirements and undergo rigorous testing to ensure patient safety. Competition encourages manufacturers to invest in research and development, leading to more robust and reliable products that can withstand the demands of the operating room.

Market competition also exerts downward pressure on prices, making surgical tables more accessible to a wider range of healthcare facilities. Manufacturers strive to balance cost-effectiveness with quality, leading to innovative cost-saving solutions that appeal to budget-conscious buyers. This competitive pricing benefits healthcare systems worldwide, driving the adoption of modern surgical tables.

As competition heats up in established markets, manufacturers often explore opportunities for global expansion. Emerging economies with growing healthcare infrastructure represent untapped markets for surgical table manufacturers. By expanding their reach, companies can tap into new customer bases and increase their market share.

Innovation often thrives when companies collaborate strategically. Manufacturers frequently partner with healthcare providers, research institutions, and technology companies to explore new avenues of product development. These collaborations foster innovation and lead to the creation of groundbreaking surgical table technologies that cater to evolving healthcare needs.

In the era of digital health, technology plays a significant role in the surgical tables market. Manufacturers leverage digital innovations such as remote monitoring, connectivity, and data analytics to enhance the functionality and safety of surgical tables. These technological advancements further differentiate products in a competitive market.

Key Market Challenges

Stringent Regulatory Compliance

One of the foremost challenges in the surgical tables market is adhering to stringent regulatory requirements. Regulatory bodies in various regions, especially in developed markets like the United States and Europe, impose strict standards on medical equipment. Manufacturers must invest significantly in research and development, quality control, and certification processes to meet these standards, which can be time-consuming and costly.

High Initial Costs

Surgical tables are substantial capital investments for healthcare facilities. The initial cost of acquiring advanced surgical tables with cutting-edge features can be substantial. Smaller or underfunded healthcare facilities may face challenges in procuring the latest equipment, which can impact patient care and surgical capabilities.

Infection Control and Hygiene

Maintaining a sterile environment in the operating room is essential to prevent infections. Surgical tables, being a critical part of the surgical setup, need to meet strict hygiene standards. Ensuring proper cleaning and sterilization of complex surgical tables can be challenging and time-consuming, potentially affecting workflow efficiency.

Key Market Trends

Integration of Artificial Intelligence (AI)

Artificial intelligence is making inroads into the healthcare sector, and surgical tables are no exception. AI-powered surgical tables can assist in patient positioning, optimize table settings for specific procedures, and even predict potential complications during surgery. By integrating AI, surgical tables can contribute to improved surgical outcomes and enhanced safety.

Robotics and Automation

The synergy between surgical robotics and surgical tables is becoming increasingly prominent. Surgical tables are being designed to seamlessly accommodate robotic systems, enhancing their precision and adaptability. Surgeons can use robotic-assisted techniques with greater ease, ushering in a new era of minimally invasive and robot-assisted surgeries.

Enhanced Imaging Capabilities

The demand for surgical tables with advanced imaging capabilities is on the rise. Tables equipped with integrated imaging technologies, such as 3D fluoroscopy and real-time MRI, are enabling surgeons to perform complex procedures with unparalleled precision. These tables offer detailed visualization of the surgical site, reducing the need for

additional imaging equipment.

Segmental Insights

Product Type Insights

Based on the category of Product Type, the general surgical tables category generated the highest revenue share in 2022. This was primarily driven by the growing number of surgeries, particularly in cardiovascular, ENT, gynecological, and other general surgical fields. The increasing prevalence of Cardiovascular Disorders (CVDs) has also led to significant demand for surgical tables. For example, according to the Centers for Disease Control and Prevention (CDC), approximately 655,000 Americans lose their lives to heart disease annually. Additionally, the World Health Organization (WHO) reports that around 17.9 million people worldwide succumb to heart disease each year.

On the other hand, the specialty surgical tables segment is expected to experience the most rapid CAGR during the forecast period. This segment encompasses neurosurgical tables, orthopedic tables, laparoscopic tables, and bariatric surgical tables. The increased need for specialty surgical tables is driven by the rising number of surgical procedures, including bariatric and orthopedic surgeries. These specialized procedures often require specific patient positioning to enable surgeons to perform effectively. Moreover, the ongoing investments by various healthcare organizations and entities to enhance surgical treatments and procedures, especially in the realm of specialty procedures, are projected to support the growth of this segment in the coming years.

Material Insights

In 2022, the metal sector dominated the revenue share. The projected growth in this segment is attributed to the increasing adoption and surging demand for metal surgical tables. This demand is driven by their easy availability and cost-effectiveness. Metal surgical tables are preferred by healthcare professionals due to their affordability compared to composite surgical tables. Among metals, stainless steel stands out as one of the most commonly used materials in the production of surgical tables.

Stainless steel possesses antimicrobial properties, making it particularly suitable for healthcare equipment and operating rooms. Consequently, the widespread use of surgical tables made from stainless steel is expected to drive growth within this segment. In 2022, the composite sector also held a substantial market share. The positioning surface of these surgical tables is crafted from carbon fiber material,

allowing for lateral and longitudinal adjustments. During surgical procedures, a motor moves both the surface and the patient to the desired position. Anticipated advancements in carbon composite surgical tables are poised to solidify their position in the market.

Regional Insights

In 2022, North America was the dominant market, capturing the largest share of revenue. The demand for surgical tables in this region is closely tied to the volume of surgical procedures conducted. North America experiences a high frequency of surgical interventions, driven by factors such as an aging population, the prevalence of chronic diseases, and advancements in surgical techniques. This surge in surgical procedures translates into increased demand for surgical tables, both within hospital settings and ambulatory surgical centers.

North America boasts a well-established healthcare infrastructure, marked by continual investments in the enhancement and expansion of healthcare facilities. The construction of new hospitals and surgical centers, as well as the refurbishment of existing healthcare facilities, provides opportunities for the acquisition of surgical tables. As an illustrative example, in April 2021, Dr. J. Joseph Hewett announced the inauguration of the Orange County Surgical Center, a facility dedicated to outpatient vascular care located in the city of Orange County, California, USA.

Conversely, the Asia Pacific region is poised to exhibit the most rapid CAGR throughout the forecast period. This growth is attributed to increasing disposable income, particularly in countries such as China and India, alongside a substantial patient population within the region. The rising prevalence of chronic diseases has led to a significant uptick in surgical procedures, consequently driving the demand for surgical tables. Furthermore, the escalation of healthcare expenditure in countries like China and Japan is expected to fuel the demand for these products in the foreseeable future.

Key Market Players

Hill-Rom Holdings Inc

STERIS PLC

Stryker Corp

Getinge AB

Shenzhen Mindray Bio-Medical Electronics Co Ltd

MIZUHO Corporation

Skytron LLC

Alvo Medical

Allengers Medical Systems Ltd

Report Scope:

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

Surgical Tables Market, By Product Type:

General Surgical Tables

Specialty Surgical Tables

Radiolucent Surgical Tables

Pediatric Surgical Tables

Surgical Tables Market, By Type:

Powered

Non-powered

Surgical Tables Market, By Material:

Metal

Composite

Surgical Tables Market, By End-use:

Hospitals

Ambulatory Surgery Centers

Specialty Clinics & Trauma Centers

Surgical Tables 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 Surgical Tables Market.

Available Customizations:

Global Surgical Tables 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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