

United Kingdom Spinal Surgery Devices Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The United Kingdom's spinal surgery devices market is expected to register a CAGR of 5.19% over the forecast period.

The COVID-19 pandemic has significantly impacted the market studied. The initial days of the pandemic hampered the studied market due to the disruption and cancellation of surgical services. However, post the first wave of the coronavirus pandemic, in conjunction with the national surgical and specialty authorized members and the Royal Colleges of Surgeons, the United Kingdom health department released guidelines for elective surgery patients. Following that, elective spine surgeries were resumed. In addition, as per a research study published in December 2021 in the BJO open-access journal, when a cohort study was conducted with patients from eight participating spinal centers across the United Kingdom, approximately 65% of the patients had degenerative spinal diseases treated with elective surgery during the pandemic period. Such instances show that during the later phases of the pandemic, the demand for spine surgeries increased. This further created demand for spinal surgery devices. Thus, the pandemic significantly impacted the market studied.

Factors such as technological advancements in spinal surgical devices, increasing demand for minimally invasive spinal surgeries, and an increase in incidences of spinal disorders are the major factors driving the growth of the market studied.

Minimally invasive spine surgery (MISS) is performed to treat different spinal disorders. According to the Hospital of St. John's & St. Elizabeth January 2022 update, MISS offers many potential advantages, such as small incisions, less cutting through soft tissues (such as ligaments and muscles), outpatient options, less post-operative pain, faster recovery. Hence, owing to the advantages, the demand for MISS surgeries is increasing in the United Kingdom. This is further driving the market growth.

Furthermore, the sacroiliac joint (SIJ) is a rare pain generator. Still, out of most consultations, the SIJ site is the typical reason for

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pain generated by the lumbar spine. According to a BASS article published in March 2022, 35% of cases of total sacroiliac joint degeneration (SIJD) are asymptomatic among the population in the United Kingdom. Thus, it implies a burden of SIJD on the country's people. This creates a demand for spine surgeries in severe cases. This is further predicted to fuel the demand for spinal surgery devices in the country, driving the market growth.

Therefore, owing to the rising adoption of MISS and the increasing burden of SIJD, the studied market is anticipated to grow over the forecast period. However, complications associated with spine surgeries are hindering the market growth.

UK Spinal Surgery Devices Market Trends

Discectomy by Spinal Decompression Segment is Expected to Witness Growth Over the Forecast Period

Discectomy is the medical term for the surgical removal of a herniated disc's damaged area in the spine. When a portion of the disc's softer interior material pushes through a tear in its harder outside, the result is a herniated disc. This may aggravate or pressure surrounding nerves, resulting in discomfort, numbness, or weakening. Thus, the segment is anticipated to witness growth owing to an increased incidence of herniated discs in the United Kingdom.

The demand for discectomy is increasing in the United Kingdom, creating opportunities for spine surgery devices. Cervical disc disease generally involves anterior cervical discectomy and fusion (ACDF). Following ACDF, recurrent laryngeal nerve palsy (RNP) is a known complication. Additionally, the data updated by ONS in August 2022 mentioned that anterior cervical discectomy and fusion (ACDF) was the most performed surgery (79%) among the studied population. Thus, these instances show a high demand for discectomy among patients in the United Kingdom. Hence, segment growth is anticipated. Therefore, the segment is expected to grow over the forecast period due to the advantages associated with discectomy and increased adoption of the procedures.

Interbody Fusion Segment is Anticipated to Witness Fastest Growth

An interbody fusion is a spinal fusion procedure that involves removing the intervertebral disk. The interbody fusion can be performed using different approaches. For instance, a surgeon can access the spine through incisions in the lower back or through incisions in the side. There are a few interbody fusion devices that are used most often during the procedures such as interbody cages, Bagby and Kuslich (BAK) cages, Polyetheretherketone (PEEK) cages, and bone dowels. As interbody fusion helps in correcting spinal weakness or instability, the demand for the procedures is increasing, fueling the need for the availability of the devices. Thereby, driving the segment growth.

There are various studies that are conducted that used several approaches of lumbar interbody fusion to treat several musculoskeletal conditions. According to an article published in the European Spine Journal in July 2022, interbody fusion is one of the most preferred treatment options for spinal degenerative diseases depending on their correction necessities, location, and preference of the surgeon.

In addition, the emergence of advanced interbody fusion methods is fueling the segment growth. As per an article published in the BMC Musculoskeletal Disorders journal in February 2022, the traditional lumbar interbody fusion involves heavy pulling of soft tissue dissection, the dural sac, and nerve root that results in postoperative complications, often.

As per the study above, the extreme lateral interbody fusion (XLIF) is being adopted recently due to fewer complications, and extensive clinical application associated with it. The XLIF involves no pulling of peripheral tissues such as nerves, blood vessels, and peritoneum. Also, in the case of XLIF there is no need to enter the spinal canal for operation, which reduces the possibility of injury to the dural sac and cauda equina, and effectively avoids the risks caused by anterior and posterior surgeries. Thus, owing to availability of advanced procedures the demand for interior body fusion procedures is increasing. This is creating demand for

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the spinal fusion devices used for the same. Thereby, predicted to contribute to the segment growth.

UK Spinal Surgery Devices Market Competitor Analysis

In the current scenario, the number of mergers and acquisitions among market players is increasing, fueling the United Kingdom Spinal Surgery Devices market. The competitive landscape provides an outlook of analysis of the various business growth strategies adopted by the industry players, increasing the number of partnerships, agreements, and collaborations among market players and driving the market value. The major players in the market are engaged in product development and strategic alliances to cater strategically to the growing global demand for the market and gain a robust place in the market. Some of the market players in the market studied are Medtronic, Stryker, Johnson & Johnson (Depuy Synthes), Globus Medical Inc., Zimmer Biomet, Orthofix Holdings Inc., NuVasive, Inc., Axis Spine Technologies, Vadin Implants, Implants International, among others.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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