

Surgical Tables Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The surgical tables market is projected to register a CAGR of 3.2% during the forecast period (2022-2027).

The pandemic has had ramifications for ways of working, and of various surgical procedures. There are strict guidelines specific to each specialty that has to be implemented and followed, for surgeons to be able to continue to provide safe and effective care to their patients during the COVID-19 pandemic. The volume of surgeries has significantly declined during the pandemic, owing to the stringent guidelines by the regulatory authorities to avoid all non-emergent surgeries. For instance, in May 2020, a research study published titled "Impact of the Coronavirus (COVID-19) Pandemic On Surgical Practice - Part 1" stated that the operating room must be disinfected according to local protocols which may include the disinfection of high-touch surfaces such as the operating table and anesthetic machine with a minimum of 75% alcohol or chlorine-based disinfectant. Hence, due to the pandemic, the caution related to the hygiene of the surgical tables has increased which has affected the market growth. However, in the long term, the market is expected to grow. This is going to impact the procurement of surgical tables for these surgical centers.

The major factor attributing to the growth of the market is the rising number of surgeries across the globe. This is due to the increasing trauma and injury cases across the globe. Moreover, the rising burden of chronic disease across the globe is also one of the major factors increasing the demand for surgical tables, as end-stage chronic diseases generally demand surgery. For instance, as per the American Health Association, in 2022, operating rooms resumed their activities and observed an upsurge in medical health treatments and surgeries, leading to only a 10% lower rate of surgery by the end of 2020 in comparison to 2019. Moreover, per the Organization for Economic Cooperation and Development (OECD), the number of cataract surgical procedures reported in 2020 in Turkey was 393,901. According to the same source, the number of hip replacement procedures in Italy in 2020 was 84,647, and cesarean section procedures were approximately 114,601. Thus, this growth in the number of surgical

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procedures will likely increase the demand for surgical tables, thereby contributing to market growth.

Chronic diseases, such as cancer, diabetes, hypertension, stroke, heart disease, respiratory diseases, arthritis, obesity, ocular disorders, etc., are often accompanied by various surgical procedures over the life span of the individual.

Additionally, According to a research study titled "Minimally Invasive Cardiac Surgery" published in the Journal of Thoracic Disease 2021, there has been significant progress in the development and adoption of minimally invasive techniques in cardiac surgery. In cardiac surgery, the median sternotomy has been, and remains, the trusted, well-established, and gold-standard access route for many decades. Adding to that, to support minimally invasive surgeries, a professional society emerged: the International Society for Minimally Invasive Cardiothoracic Surgery (ISMICS). The growing number of procedures implies more attention toward the facilities available inside the operation theatre rooms. Thus, the importance and demand for surgical tables continue to grow steadily.

Rising investments in surgical instruments by hospitals are boosting the market. However, the lack of skilled labor is the major drawback of market growth.

Surgical Tables Market Trends

General Surgical Table is Expected to Hold the Large Market Share Over the Forecast Period

General surgeries, including cardiovascular, gastroenterology, ENT, orthopedic, and gynecology, are some of the most common general surgeries. Owing to the high penetration of general surgeries in the market, the demand for general surgical tables is also high. General surgical tables are the ones on which a patient lies down during a surgical procedure. Their demand is higher than the specialty tables, as the special ones are used only in very few cases in very few hospitals. Therefore, as the number of surgeries increases, the market growth also expands.

Research studies are another factor in the market growth. For instance, as per the research study published in September 2020, titled "Estimation of the National Surgical Needs in India by Enumerating the Surgical Procedures in an Urban Community Under Universal Health Coverage", about 11% of the global burden of disease requires surgical or anesthesia care or both, and an estimated 3,646 surgeries would be required annually to meet the surgical needs of the Indian population as compared to the global estimate which is 5,000 surgeries per 100,000 people. Thus, the rising demand for surgeries around the world will drive the growth of the segment during the forecast period.

Technological advancements and novel products in these surgical tables are some of the major reasons propelling the market growth. For instance, in July 2020, Hillrom launched PST 500, a precision surgical table, and an addition to the Yellofins stirrups line, Yellofins Apex. Additionally, in October 2021, Stille AB announced an exclusive collaboration with GE Healthcare for a new general surgery table in the United States.

Hence, due to the above-mentioned factors, the market is likely to grow in the future.

North America Dominates the Market and Expected to do Same in the Forecast Period

North America is expected to dominate the surgical tables market over the forecast period. The positive reimbursement situation in the United States, the increasing inclination toward minimally invasive surgeries, and the soaring number of surgeries are the major factors driving the growth of the surgical tables market in North America. Furthermore, growing awareness among the population to approach surgical procedures in case of injuries and chronic disease problems is also driving the market growth.

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The volume of knee and hip replacement surgeries has increased in recent years which has positively impacted the growth in the segment in the surgical tables market. For instance, as per a 2020 report by the American Society of Plastic Surgeons, a total of 15.6 million cosmetic procedures were performed in 2020 in the United States. Similarly, according to the American Society of Plastic Surgeons report of 2020, a total of 15.6 million cosmetic procedures were performed in the United States in 2020, of which 2.3 million were cosmetic surgical procedures and 13.2 million were cosmetic minimally-invasive procedures. The top five cosmetic surgical procedures of 2020 in the United States were nose reshaping, eyelid surgery, facelift, liposuction, and breast augmentation.

The rising number of surgeries concerning cardiovascular and neurological diseases within the North American region is likely to have a positive impact on the market growth. For instance, according to the Center for Disease Control and Prevention's 2022 update, a total of 18.2 million adults had coronary artery disease, and approximately 70% of these patients underwent surgery. In addition, as per the same source, almost 659,000 Americans die from heart disease each year. Moreover, there are nearly 35 million hospital stays each year in the United States. Hence, this rise in hospital stays and surgeries is likely to have a positive impact on the market's growth.

Moreover, there is a huge presence of key players in the market in this region, owing to which the region is expected to propel at high growth rates.

Collaborations between key market players are another factor in market growth. In October 2021, Stille AB collaborated with GE Healthcare for a new general surgery table in the United States. The new general surgery table, GS2, has been developed to address a growing need for a premium general surgery table that satisfies the needs of multi-disciplinary surgery units such as Ambulatory Surgery Centers (ASC), while also providing a cost-effective high-value solution. These healthcare facilities perform procedures across a wide spectrum of surgical disciplines alongside the OEC C-arms such as orthopedics, general surgery, cardiovascular, and urology, as well as non-fluoroscopic specialties like plastic surgery, and thus require a highly versatile surgical table. Hence, such developments would increase market growth in the upcoming future.

Hence, due to the above-mentioned factors, the market is expected to grow in the future.

Surgical Tables Market Competitor Analysis

The surgical tables market is moderately competitive and consists of several major players. Some of the companies which are currently dominating the market are Steris PLC, Skytron LLC, Stryker Corporation, Mizuho OSI, Getinge AB, Schaerer Medical USA Inc., NUVO Inc., Allengers Medical Systems Limited, Invacare Corp., Elekta AB, and Trumpf Medical.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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