

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

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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Report description:

The surgical lights market is expected to witness a CAGR of 5.0% over the forecast period, 2022-2027.

The surgical lights market's growth was hampered due to a decline in the number of surgeries and procedures amid the COVID-19 pandemic. Elective and other routine operations were canceled or postponed, allowing critical care units to use the operating and recovery rooms for COVID-19 patients. The manufacturers were forced to discontinue the production of surgical lights owing to the closure of facilities, lower manpower, and disruption in the supply chain in the initial phase of the outbreak. Such incidents hindered the growth of the market in the early pandemic phase. On the other hand, emerging complications with the SARS-CoV-2 virus have resulted in an increase in surgical complications, ultimately increasing the total number of surgeries performed within the countries. For instance, as per the article titled "Post COVID-19 pulmonary complications; a single-center experience" published in PubMed Central in December 2021, patients may develop severe pulmonary complications following the resolution of COVID-19, which can continue for months and influence quality of life, I.C.U. hospitalization, or even death. Thus, the growing need for hospitalization will, in turn, propel the installation of surgical lights across healthcare settings for performing surgical procedures, thereby impelling the market growth over the coming years.

Furthermore, factors driving the market growth are the significant rise in surgical treatments and technological advancements in the field of surgical lighting systems. 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.

Likewise, technological enhancements are likely to bolster the growth of the surgical lights market in the near future. For instance, in March 2021, the DASSL (Diffuse Asymmetric Symmetric Surgery Lens) was introduced by A.L.P. for recessed or

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surface-mounted luminaires in operating rooms. The novel biased diffuse microstructure lens improves L.E.D. hiding power, smooth distribution, and lighting distributions that are both symmetrical (along the axis) and asymmetrical (cross axis). Similarly, in January 2020, Gentex Corporation introduced a cutting-edge lighting solution for medical applications developed in collaboration with Mayo Clinic. Gentex's innovative smart lighting system optimizes illumination for surgical and patient-care environments by combining ambient room light with camera-controlled, adaptable task lighting.

However, the higher cost associated with surgical lights is one of the major factors restraining the market's growth over the analysis period.

Surgical Lights Market Trends

LED Lights Segment is Expected to Witness a High CAGR during the Forecast Period

For open surgery, LED lighting is the most commonly used light source. They help reduce shadows in open surgery. Due to its long-term cost savings, quantity and quality of illumination, and acceptable intensity of illumination, the LED lighting segment is projected to have a significant market share. Moreover, with several advantages such as shadow dilution, correlated color temperature, homogeneity, and color rendering index over traditional lighting, LED lighting is most widely accepted in surgical settings. Also, other surgical lights, such as halogen or gas discharge bulbs, use more power than those LEDs, making them less preferable. In addition, advanced LED lights have an estimated life cycle of about 50,000 hours. LED bulbs outlast halogen bulbs by ten times while using 85 percent less energy. As a result, LED light is preferred in operating rooms by 75% more than halogen. Such factors are likely to propel the segment's growth over the forecast period.

Furthermore, a growing number of strategic initiatives by key market players is boosting the growth of the segment over the analysis period. For instance, in August 2021, Fujifilm launched the Eluxeo 7000X system imaging tool, which has five LED lights for a real-time picture during an endoscopic operation.

Thus, owing to the aforementioned factors, the LED light segment is likely to dominate the market.

North America is Expected to Hold a Major Share of the Surgical Lights Market

North America dominates the surgical lights market due to the rise in the number of surgeries, the growth in the number of hospitals and ambulatory surgical centers, and the presence of key manufacturers in the United States. Cardiovascular and neurological surgeries take longer hours, resulting in more use of surgical lighting and a higher demand for surgical lights across hospitals. The rising number of surgeries with respect to 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, Indiana University Health announced in April 2022 that it would invest USD 287 million in renovating and expanding services at its decade-old Saxony Hospital in Fishers, United States. As a result of the project, the hospital campus will expand by nearly half of its initial capacity as the number of inpatient visits will increase from 50 to 88.

Thus, the abovementioned factors are all contributing to the growth of the surgical lights market within the region.

Surgical Lights Market Competitor Analysis

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The surgical lights market is moderately competitive, with several players across the globe. In terms of market share, various major players currently dominate the market. With the rising hospital infrastructure and high prevalence of surgeries, many regional players are expected to be part of the surgical light market over the forecast period. The key players in the market for surgical lights are Hill-Rom Services, STERIS, SKYTRON, A-dec, Getinge AB, Integra Life Sciences, Koninklijke Philips, EPMD Group, SIMEON Medical, and Stryker.

Additional Benefits:

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

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