

Ambulatory Surgery Center Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The ambulatory surgery center market is expected to witness a significant CAGR of 5.8% during the study period.

The ambulatory surgery center market was significantly impacted during the COVID-19 outbreak due to the rising demand for critical care for COVID-19-positive patients and an increase in its diagnosis. As per the article published by the MDH in May 2022, ambulatory surgical centers and other facilities, performing surgeries and procedures were encouraged to consider guidance to mitigate the spread of COVID-19 and to preserve resources such as staffing, bed space, personal protective equipment, and ventilators, needed to care for patients with COVID-19. Thus, ambulatory surgery centers played an important role in the COVID-19 times, thereby impacting the growth of the market during the pandemic period. However, the decrease in COVID cases across the world and the resumption of various ambulatory surgical centers services during the post-pandemic period is expected to contribute to the growth of the market over the coming years.

The factors propelling the studied market growth are the growing burden of chronic diseases, increasing demand for surgeries, and increasing shift towards ambulatory surgery centers. In addition, new product launches and strategic initiatives taken by the key market players will further drive market growth. The high prevalence rate of neurodegenerative disorders like Parkinson's disease, Alzheimer's disease, and Dementia, among others, are also expected to boost the market growth over time. As per the WHO data published in September 2022, worldwide around 55 million people have dementia in 2021, with over 60% living in low-middle-income countries. The report also mentioned that the number of dementia cases is expected to rise to 78 million by 2030 and 139 million by 2050. Thus, the increasing burden of such chronic diseases is expected to contribute to the demand for ambulatory surgery centers, thereby contributing to the growth of the market.

Additionally, strategic initiatives such as product launches, mergers, and acquisitions, partnerships, and others will also lead to

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lucrative growth of the market. For instance, in January 2021, HST Pathways launched a premier membership program for ambulatory surgery centers (ASCs), "HST One." This membership program will enable its end user to select bundled popular products as part of their membership, with the flexibility to add on additional services as needed. Such initiation of delivering customized services at ambulatory surgical centers will attract a greater number of patients and will lead to significant growth in the market.

Furthermore, in November 2021, Effingham Ambulatory Surgery Center, an affiliate of United Surgical Partners International (USPI) and Sarah Bush Lincoln Health System (SBLHS), entered into a joint venture agreement and launched a new total joint program. This program will provide one-on-one support for the patient from the time they are scheduled for surgery through postoperative recovery. Such initiatives by market players will help in improving the quality of care delivered, thereby fueling the market growth.

Moreover, the increasing launches of advanced ambulatory surgery center services are also expected to contribute to the growth of the market. For instance, in April 2021, Orange County Surgical Center was launched by Dr. Hewett in California, United States. Orange County Surgical Center is one of the Medicare-certified, super-hybrid ambulatory surgical centers. Thus, the rising prevalence of chronic diseases, increasing market strategies by various market players along with the launch of advanced ambulatory surgical centers are expected to contribute to the growth of the market. However, huge investments and time required for product development are expected to hinder the market growth during the forecast period.

Ambulatory Surgery Center Market Trends

Orthopedics Segment is Expected to Account for the Largest Market Share During the Forecast Period

Orthopedic surgery is performed on the musculoskeletal systems in the body due to some diseases, disorders, trauma, accidents, or any condition, which includes bones, joints, and adjacent soft tissues. The most common orthopedic surgeries are arthroscopy, soft tissue repair, hip, and knee or any other joint replacement, and bone fracture repair, among others.

The orthopedic segment is expected to grow significantly over the study period due to the growing burden of orthopedic surgery and rising strategic initiatives by market players. The volume of knee and hip replacement surgeries increased in recent years, which has positively impacted the growth in the segment in the electrosurgical devices market. For instance, as per the June 2021 report of the Canadian Institute of Health Information, 63,496 hip replacements and 75,073 knee replacements were performed in Canada. Moreover, there was an average increase of about 5% in recent years in knee and hip replacement procedures in the above-mentioned country. Likewise, in the State of Musculoskeletal Health 2021, a report published by Versus Arthritis organization shows that approximately 118,316 hip replacements and 123,690 knee replacements were carried out in the United Kingdom. Hence, with the high volume of orthopedic procedures, there may be a huge demand for ambulatory surgery centers, thus driving the growth of the studied segment.

Additionally, strategic initiatives taken by the market players, such as partnerships, mergers, and acquisitions, among others, are expected to drive segment growth. For instance, in February 2022, EMU Health and NYU Langone Orthopedics entered into a collaboration to launch a new Outpatient Joint Replacement Program to provide specialized joint replacement surgery in an ambulatory care center, thereby fueling the segment growth. Thus, due to the above-mentioned factors, such as the high volume of orthopedic surgeries, and increasing market player strategies, the studied segment is expected to contribute to the significant growth of the market.

North America is Expected to Hold a Significant Share in the Ambulatory Surgery Center Market

The primary driving factors for the growth of the North American ambulatory surgery center (ASC) market are the increasing

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prevalence of chronic diseases, increasing demand for surgeries, increasing product launches, and rising strategic initiatives by key market players. For instance, the article published by BMC Journal in April 2021 mentioned that the prevalence of chronic diseases among the Canadian population was 33% in 2021. Also, according to the Kidney Disease Statistics 2021 for the United States, chronic kidney disease (CKD) affects more than 1 in 7 United States adults annually, and it is estimated that 37 million Americans suffer from kidney disease in the United States. Likewise, the IDF data published in 2021 mentioned that the prevalence of diabetes in Mexico was 16.9% in 2021 and is expected to rise to 18.3% by 2030. Thus, the growing burden of various chronic diseases in North American countries is expected to contribute to the growth of the market over the forecast period.

Additionally, the article titled published in September 2021 by UnitedHealth Group, suggested that shifting outpatient procedures for non-complex commercially insured individuals to ASCs would reduce spending by 59% and save USD 684 on average per outpatient procedure. Thus, cost-effective diagnostics and therapeutics with ASC are expected to lure more consumers, thereby driving the market.

Moreover, strategic initiatives taken by the key market players, such as partnerships, initiation of new programs, and mergers and acquisitions, among others, will drive the market growth. For instance, in March 2021, Ascension signed an agreement with Regent Surgical Health, a developer, owner, and manager of ambulatory surgery centers (ASCs). Through this partnership, Ascension and Regent will develop or acquire and operate ambulatory surgery centers across the communities Ascension serves, providing patients with convenient access to high-quality outpatient surgical services.

Furthermore, in October 2021, United Surgical Partners International (USPI) entered into a definitive agreement with Compass Surgical Partners to purchase its ownership and management interests in nine ambulatory surgery centers (ASCs). This will help in providing well-established ASC across the country, thus driving the market. Therefore, due to the above-mentioned factors, such as the increasing prevalence of chronic diseases, frequent product launches, and rising strategic initiatives by key market players the studied market is expected to lead to lucrative growth of the market in North America.

Ambulatory Surgery Center Market Competitor Analysis

The ambulatory surgery center market is moderately competitive. The competitive landscape includes an analysis of a few international as well as local companies which hold market shares and are well known. The major players in the market are AMSURG, Tenet Healthcare, HCA Healthcare, Surgical Care Affiliates, Cerner Corporation, and Others.

Additional Benefits:

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

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