

Pneumatic Tourniquets Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The pneumatic tourniquets market is anticipated to witness a CAGR of nearly 7.1% during the forecast period (2022-2027).

COVID-19 has created a global public health emergency that has affected almost every business and industry. The long-term effects are projected to have an impact on the industry growth during the forecast period. Limitations on elective surgical procedures and disruption of the supply chain during lockdown have affected the market for surgical procedures worldwide and impacted the market negatively.

An article published in December 2021 titled "WALANT technique versus locoregional anesthesia in the surgical management of metacarpal and phalangeal fractures: Lessons from the Covid-19 crisis, the Covid-19 pandemic" mentioned that Wide Awake Local Anesthesia No Tourniquet (WALANT) is an anesthetic method that enables the use of a local injection of anesthetic and epinephrine, avoiding the use of a tourniquet. This WALANT proved to be a safe and effective method in hand fracture surgery, ensuring access to surgical care in the Covid-19 perspective. To avoid the spread of the virus, care centers have approached alternatives that impacted the studied market negatively.

However, the increasing number of orthopedic and plastic surgeries performed, the surge in accidental injuries and falls, and the subsequent rise in the prevalence of degenerative bone diseases have driven the studied market growth in recent years. For instance, "Hospital Accident & Emergency Activity, 2020-21", provided by National Health Services (NHS), states that in the year 2020-21, there were 14.4 million attendances in Accident and Emergency (A&E) departments in NHS hospitals. This increasing burden of accident emergency admissions is anticipated to increase the demand for wound care surgeries, hence driving the demand for pneumatic tourniquets for bloodless and dry surgical procedures. This is expected to boost the growth of the studied market.

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Furthermore, pneumatic tourniquets are routinely and safely used in limb surgeries throughout the world. The application of these tourniquets alters normal physiology. The use of these tourniquets is a common practice in orthopedic and plastic surgeries. The increase in plastic surgery and other augmentation procedures is anticipated to drive intravenous regional anesthesia (IVRA), driving the growth of the studied market.

Moreover, recent acquisitions and strategic steps taken by major players are increasing the demand for pneumatic tourniquets. For instance, in 2020, Dessimions & Dutrillaux acquired Electro Concept Medical to pool the skills of research and development, production, and distribution. These strategic activities by major players are anticipated to drive the growth of the studied market.

However, the lack of skilled professionals to handle the systems during the surgery is anticipated to hinder the market growth over the forecast period.

Pneumatic Tourniquets Market Trends

Orthopedic Surgery by Application is Expected to Dominate the Market Over the Forecast Period

The pneumatic tourniquets allow for minimal exposure, dissection, and handling of the arteries, and it may decrease the risk of spasms or injury caused by clamping of the tibial vessels. These tourniquets are generally used in limb surgeries, be it orthopedic or plastic surgeries.

The orthopedic surgery by application segment is anticipated to witness growth over the forecast period owing to increasing orthopedic conditions and other degenerative bone diseases. Both the prevalence is expected to demand better surgical care, which can provide a dry operative field and limit intraoperative blood loss during extremity surgery. Hence, this is expected to drive the growth of the studied market.

The growth of the segment is likely to be fueled by the rising prevalence of target conditions such as osteoarthritis and the growing number of knee and hip replacement surgeries. The Organization for Economic Co-operation and Development (OECD) Health statistics data updated in November 2021 shows that there were over 193.9 hip replacement surgeries performed per 100,000 population in Italy. While over 294.9, 312.9, and 283.3 hip replacement surgeries were performed per 100,000 population in Austria, Switzerland, and Belgium, respectively, in the same year.

In addition to that, the Canadian Institute for Health Information's updates from June 2021 report shows that in 2019-2020 in Canada, 63,496 hip replacements and 75,073 knee replacements were performed. This represents a 2.4% increase for hips and a 0.4% decrease for knees compared with the previous years. This rising prevalence of orthopedic conditions worldwide is anticipated to drive the growth of the segment.

Hence, the orthopedic surgery by application segment is growing, and it is expected to have significant growth over the forecast period. Hence, driving the growth of the studied market.

North America is Expected to Dominate the Market in the Forecast Period

Factors such as the increasing geriatric population across the region, healthcare infrastructure, better reimbursement policies, and the increasing burden of orthopedics and other diseases are anticipated to drive the growth of the North American pneumatic tourniquet market.

The pneumatic tourniquets are commonly used in orthopedic surgeries to achieve a nearly bloodless surgery and an optimal

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operating field or when administering regional anesthesia during surgery. The National Arthritis Data and Statistics updated in October 2021 by the Centre for Disease Control and Prevention (CDC) reported that about 1 in 4 adults (23.7%) or about 58.5 million people have doctor-diagnosed arthritis in the United States (US). The source also stated that, by the year ended 2040, 78.4 million adults aged 18 years and older (25.9% of the projected total adult population) are expected to have doctor-diagnosed arthritis in the US. This is expected to create opportunities for more orthopedic surgeries, driving the growth of the studied market in the country.

Moreover, the expenditure on hospital construction and expansion is increasing in the United States. For instance, in October 2021, Massachusetts General Hospital received approval from the Boston Planning and Development Agency board for a one-million-square-foot with USD 2 billion expansion. In addition to that, in October 2021, Penn Medicine opened a hospital in Philadelphia worth USD 1.6 billion, which marked the completion of one of the largest hospital projects in the United States. These rising expenditure on the expansion and construction of hospitals is expected to generate demand for medical devices and are anticipated to drive the growth of the studied market in the country.

Furthermore, osteoarthritis is a degenerative disease that worsens over time and often results in chronic pain. The Arthritis Facts and Figures updated in September 2021, published by the Arthritis Society, reported that osteoarthritis is the most common form of arthritis, and more than 4 million Canadians have osteoarthritis (OA), and about 1 in 7 Canadian adults live with this progressive and painful disease. The source also mentioned that more than 30% target population is diagnosed with a mood or anxiety disorder as well as OA. This prevalence of the degenerative bone disease is anticipated to drive the demand for orthopedic surgeries for treatment. As pneumatic tourniquets have the primary application in orthopedic surgeries, the increase in orthopedic surgeries is expected to increase the demand for pneumatic tourniquets. Hence, it is anticipated to drive the growth of the studied market in Canada.

Therefore, owing to the aforementioned factors, the North American region is expected to witness strong growth over the forecast period driving the growth of the studied market.

Pneumatic Tourniquets Market Competitor Analysis

In the current scenario, the strategies by the market players are increasing, and it's fueling the global pneumatic tourniquet market. The market is competitive in nature and globally consolidated due to the presence of limited major players in the market. Stryker, Zimmer Biomet, Ulrich medical, AneticAid, VBM Medizintechnik GmbH, Dessillions & Dutrillaux (D&D), DSMAREF Co.Ltd., Hangzhou Kimislab Co., Ltd., Shanghai Huifeng Medical Instrument Co., Ltd., Jiangsu Qianjing Medical Equipment Co., Ltd are some of the major players among others.

Additional Benefits:

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

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