

Global Surgical Case Carts - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global Surgical Case Carts Market size is estimated at USD 415.36 million in 2024, and is expected to reach USD 590.5 million by 2029, growing at a CAGR of 7.29% during the forecast period (2024-2029).

The COVID-19 pandemic and numerous advisories from the respective government regarding surgical procedures led to a significant decrease in surgical procedures around the world. For instance, according to the study published in PLOS One, in August 2022, the quaternary care facility successfully dealt with the COVID-19 pandemic's pressures by significantly reducing the number of surgical procedures performed during the peak of the pandemic. However, despite uneven recovery rates across subspecialties and case classes, total surgical procedure volumes did not fully return to pre-COVID-19 levels until well into 2021. This has impacted the adoption of surgical case carts due to the reduced number of surgeries during the pandemic. However, the number of surgeries increased after the initial decline during the pandemic, and it is expected that the studied market will bounce back to its full potential in the coming years. For instance, according to the research study published in Frontiers in Surgery, in December 2021, there was a 48.0% decrease in total surgical procedure volume immediately after the March 2020 recommendation to cancel elective surgical procedures. However, after the reopening, the rate of surgical procedures rebounded to pre-pandemic levels, and the trend was maintained throughout the peak burden of patients with COVID-19 in the fall and winter in the United States. This shows that the number of surgical procedures is expected to reach a pre-COVID level soon, and the studied market is expected to grow over the forecast period.

Certain factors that are propelling the market growth are the increasing number of surgeries and rising healthcare infrastructure.

The increasing burden of chronic diseases among the population raises the need for surgeries which in turn is anticipated to fuel the demand for surgical case carts, hence propelling the market growth. For instance, according to the data published by the

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OECD, in August 2022, 94.87 thousand surgeries were performed in Portugal, followed by 49.33 thousand in Denmark, 32.84 thousand in Ireland, and 21.5 thousand in Norway. Also, in October 2022, Hexahealth published a report stating that the estimated number of bypass surgeries is 60,000 in India annually.

Additionally, as per the German Heart Surgery 2021 report, about 92,838 heart surgeries were performed in Germany, including 36,714 isolated heart valve procedures, 27,947 isolated coronary artery bypass grafting procedures, and 329 isolated heart transplantations that year. Therefore, such a huge number of surgeries will lead to increased adoption of surgical case carts during the surgeries, thereby driving market growth over the forecast period.

Furthermore, the rising healthcare spending across the countries is also expected to propel the market growth. For instance, as per the data published by the OECD, in August 2022, the estimated per capita healthcare expenditure in European countries such as Austria, Germany, Ireland, and Poland in 2021 was EUR 5,488.2 (USD 5902.09), EUR 5,498.5 (USD 5913.17), EUR 5,665 (USD 6092.23), and EUR 4,568.8 (USD 4913.36), respectively. Therefore, the high per capita expenditure on healthcare in European countries will lead to increased adoption of healthcare in European hospitals, thereby leading to the adoption of surgical case carts in surgical rooms, driving the market growth.

Therefore, owing to the aforementioned factors, the studied market is expected to grow over the forecast period. However, the lack of infrastructure in developing countries is likely to hinder the growth of the surgical case carts market over the forecast period.

Surgical Case Carts Market Trends

The Ambulatory Surgical Centers Segment is Expected to Witness Growth Over the Forecast Period

The ambulatory surgical centers (ASCs) segment is expected to witness significant growth over the forecast period. ASCs are modern medical facilities providing same-day surgical care, including diagnostic and preventive procedures. They are also known as outpatient surgical centers where procedures do not require hospital admissions, and rising demand for ASC services in the country is expected to drive growth in the studied segment.

ASCs have been a popular alternative to inpatient hospital settings because of their flexible scheduling options, calmer and more pleasant surroundings, and lower costs. This is expected to fuel growth in the ambulatory care centers segment with an increasing number of ASCs and new investments in the area.

Additionally, the increasing development of new surgical centers raises the demand for surgical case carts, which in turn is anticipated to fuel the segment growth over the forecast period. For instance, in May 2021, Arizona-based Joel Rainwater launched a flagship Comprehensive Surgical Care center in Gilbert, Arizona, that includes three operating rooms equipped with advanced imaging systems. The company is backed by USD 125 million in funding from an investor and plans to open 20 locations in the next two years.

Furthermore, the growing companies focus on adopting various key strategies such as mergers and acquisitions and collaboration, contributing to the segment's growth. For instance, in June 2022, United Surgical Partners International (USPI), a Tenet Healthcare affiliate, and United Urology Group (UUG) signed a definitive agreement to form a joint venture partnership in 22 outpatient surgical centers (ASCs). As per the terms of the agreement, USPI partially acquires new and well-established facilities owned by UUG in Maryland, Colorado, and Arizona.

Therefore, with the growing number of ambulatory surgical centers, the demand for surgical case carts is expected to increase, which is anticipated to fuel growth in the ambulatory surgical center segment over the forecast period.

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North America is Expected to Have the Significant Market Share Over the Forecast Period

North America is expected to witness significant growth in the surgical case carts market over the forecast period. The factors attributing to the market growth are the increasing number of surgeries owing to various chronic conditions and growing expenditure for the development of new and innovative products as healthcare expenditure is increasing in the country.

The rising number of cancer cases in the region is expected to increase the demand for cancer surgeries, which is anticipated to fuel the demand for surgical case carts over the forecast period. For instance, the 2022 statistics published by ACS estimated about 1.9 million new cancer cases to be diagnosed in the United States that year. In addition, as per the same source, an estimated 151,030 new cases of colon cancer, 287,850 new breast cancer cases, and 268,490 prostate cancers are expected to be diagnosed in the United States in 2022. Similarly, as per the statistics published by the Canadian Cancer Society, in November 2022, an estimated 233,900 people were expected to be diagnosed with cancer in Canada in the same year.

Additionally, the data updated by Cedars-Sinai in January 2022 showed that coronary artery bypass graft surgery (CABG), also known as coronary artery bypass or bypass surgery, was the most common heart surgery and more than 300,000 people have successful bypass surgery in the United States each year.

Furthermore, the increasing government focuses more on healthcare and hospital investments to ensure accessible, public, high-quality healthcare. For instance, in March 2022, the federal government introduced Bill C-17 in the House of Commons, which provided USD 2 billion in additional healthcare funding to clear 700,000 surgeries and other medical procedures delayed by the COVID-19 pandemic and support hundreds of thousands of additional surgeries. These increases in surgeries are expected to create demand for the surgical case carts used during the surgeries for assistance and ease, thereby driving the studied market growth.

Moreover, in April 2022, the Jalisco government, Mexico, planned to invest more than USD 301.5 million in healthcare infrastructure over the next three years to build new hospitals and healthcare centers and upgrade existing ones. Additionally, the 'Mexican Social Security Institute (IMSS)' shared plans to invest USD 677.2 million to build 111 new hospitals by 2024. This is expected to drive the studied market growth. These investments are predicted to provide a new opportunity for surgical case carts in hospital and clinic settings, bolstering the overall market growth in the region.

Therefore, owing to the factors such as the rising number of cancer and cardiac surgeries among the population and the growing government focus on increasing healthcare and hospital infrastructure, the studied segment is expected to grow over the forecast period.

Surgical Case Carts Industry Overview

The surgical case carts market is competitive and consists of a number of major players. The competitive landscape includes an analysis of a few international as well as local companies which hold market shares and are well known. Some of the key players in the surgical case carts market include Bailida Medical, Capsa Healthcare, Lakeside Manufacturing Inc., MAC Medical Inc., and Pedigo Products.

Additional Benefits:

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

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