Surgical Site Infection Control - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

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Report description:

The Surgical Site Infection Control Market size is estimated at USD 5.35 billion in 2024, and is expected to reach USD 6.45 billion by 2029, growing at a CAGR of 3.80% during the forecast period (2024-2029).

COVID-19 had an impact on surgical operations performed globally. Due to regulatory authorities' strict guidance to prevent any non-emergent surgeries, the volume of surgeries drastically decreased throughout the pandemic. For instance, according to the study published in October 2021 by the National Library of Medicine, there was a 42.8% decrease in general surgery admissions globally. As a result, the COVID-19 pandemic substantially impacted the surgical site infection control market. However, the COVID-19 pandemic underlined the critical necessity of hand hygiene and the use of conventional infection control methods. Moreover, owing to the resumption of elective surgeries and stabilizing COVID-19 cases, the market soon bolstered to its pre-pandemic levels. For instance, in March 2022, PDI launched Sani-24 Germicidal Disposable Wipe, Sani-HyPerCide Germicidal Disposable Wipe, and Sani-HyPerCide Germicidal Spray, innovative disinfectants to help infection prevention professionals in the fight against rising healthcare-associated infections (HAIs) as well as the ongoing battle against COVID-19.

The increasing number of hospital-acquired infections is due to the rising total number of surgeries and the growing geriatric population. According to an article published in April 2022 by UpToDate, surgical site infection (SSI) is the most common healthcare-associated infection following surgery. It is associated with significant morbidity and mortality, transfer to an intensive care unit setting, prolonged hospitalizations, and hospital readmission. Among those who undergo surgical procedures annually in the United States, 2 to 45 will develop an SSI, representing a significant burden on the health care system. Such a high burden of surgical site infection is expected to drive the market's growth.

Furthermore, according to the United Nations' World Ageing Population 2022 highlights, The share of the global population aged

65 years or above is projected to rise from 10% in 2022 to 16% in 2050. By 2050, the number of persons aged 65 years or over worldwide is projected to be more than twice the number of children under 5 years and about the same that of children under 12 years. Thus, with the growing age, people are more prone to several chronic diseases and need surgical measures, which are expected to boost the growth of the surgical site infection control market over the forecast period. Moreover, as per the data published by the Health Resources and Services Administration in March 2022, about 40,000 organ transplants were performed in the United States in 2021. In addition, 26,670 kidney transplants and 9,236 live transplants were performed in 2021 in the United States. Therefore, the increased organ transplant is expected to increase surgical site infections and increase the demand for the control of such infections. The market is expected to see a surge over the forecast period.

Additionally, technological advancements, and an increase in the number of surgical site infections during surgical procedures, further drive the growth of the market studied. For instance, in March 2022, TELA Bio launched SiteGuard, a no-rinse antimicrobial solution. SiteGuard utilizes Next Science's proprietary XBIO Technology that supports surgical site and post-operative infection control by addressing the biofilms that make bacteria more resistant to traditional antimicrobial agents, disinfectants, and host immune defenses.

However, a lack of awareness about SSI among individuals restrained the market over the forecast period.

Surgical Site Infection (SSI) Control Market Trends

Superficial Incisional Segment is Expected to Exhibit Fast Growth Rate Over the Forecast Period

Only the skin and subcutaneous tissue of the incision are infected in a superficial incisional SSI. This infection occurs only in the areas where the incision was made on the skin.

The rising cesarean surgeries and increasing prevalence of chronic diseases are expected to boost the segment. For instance, According to World Health Organization (WHO) updates from June 2021, cesarean section use continues to rise globally, accounting for more than 1 in 5 (21%) childbirths. If this trend continues, by 2030, the highest rates are likely to be in Eastern Asia(63%), Latin America and the Caribbean (54%), Western Asia (50%), Northern Africa (48%), Southern Europe (47%) and Australia and Newzealand (45%). Thus, the increasing cases of such surgeries have a higher risk of developing surgical site infections, which is expected to increase the demand for surgical site infection control products and boost the market segment's growth over the forecast period.

Additionally, in May 2021, Becton, Dickinson, and Company launched BD Surgiphor Sterile Wound Irrigation System, the first and only ready-to-use aqueous povidone-iodine (PVP-I) irrigation solution that mechanically loosens and removes wound debris. Such launches are expected to propel the growth of the market.

Thus, all the factors above, such as rising surgical site infections and hospital-acquired disorders, boost the segment's growth.

North America Captured the Large Market Share and is Expected to Retain its Dominance

The surgical site infection control market has been dominated by North America, with the United States accounting for the largest share of regional revenue. The increase in hospital stays due to chronic diseases and surgeries, the rising number of hospital admissions, the increasing burden of hospital-acquired infection coupled with the innovative technologies implemented in devices that control infection, and others are expected to boost the market's growth in the region.

SSIs are the most common healthcare-associated infection (HAI) among inpatients in acute care hospitals in the United States (tied with pneumonia). According to the CDC data updated in 2021, about a 24% increase in central line bloodstream infection

(CLABSI) and a 35% increase in Ventilator-Associated events (VAE) between 2019-2020. Such a high surgical site infection rate creates the need for Surgical Site Infection Control (SSIC) products and thus propels the growth of the market.

According to 2022 data from the AHA, there were approximately 33,356,853 hospital admissions in 2022. Many of these admissions were due to chronic diseases and critical procedures, like heart bypass surgery. Thus increasing number of hospital admissions is expected to have more SSIs, thereby boosting the market in the region.

Additionally, in February 2021, Penn Medicine opened its new Interventional Support Center (ISC), one of the most prominent instrument processing and surgical supply preparation facilities in Southwest Philadelphia, United States. The ISC is one of the first facilities of its kind in Pennsylvania, where staff will sterilize and package thousands of instruments each day in preparation for surgeries and procedures, from basic scissors and clamps to advanced robotic instruments. Establishing such facilities is also expected to propel the market's growth.

Thus, all factors above are expected to boost the market in the region over the forecast period.

Surgical Site Infection (SSI) Control Industry Overview

The surgical site infection control market is fragmented in nature. 3M Company, Becton, Dickinson and Company, Biomerieux SA, Getinge Group, and Johnson & Johnson are some significant players in the surgical site infection control market. The competitive rivalry of the market studied has intensified, owing to the constant product innovations worldwide.

Additional Benefits:

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

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