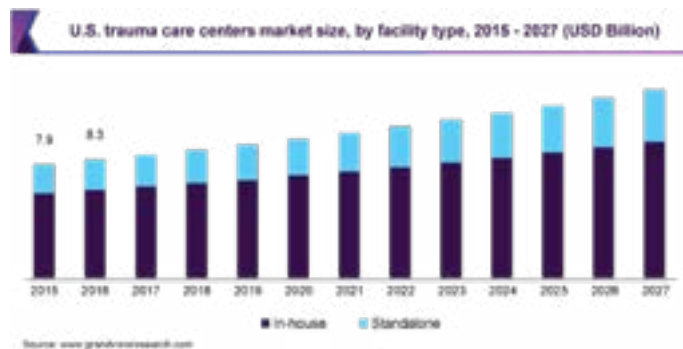


## Market Analysis: Trauma and Critical Care

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The global trauma care centers market size was valued at USD 18.1 billion in 2019 and is projected to grow at a compound annual growth rate (CAGR) of 4.9% over the forecast period. The growing number of traumatic injury-related emergency department (ED) visits along with increasing in-house admissions for patients with injuries majorly caused by falls, traffic-related injuries or traumatic car crash injuries, and wounds caused by gunshot or stab is one of the key factors propelling market growth. Among all the trauma cases, injuries caused by falls in 2018 reported to be the most frequent cause for both ED visits and critical inpatient stays accounting for approximately 35.7 percent and 42.8 percent of overall critical ED visits and in-house stays, respectively, in the U.S. Also, the majority of trauma-related ED visits and inpatient stays were reported to be the injuries caused by road accidents, wounds, cuts, burns, suffocation, and drowning.



Approximately two-thirds of the trauma-related deaths caused due to falls and traffic accidents occur in the Southeast Asian countries. The growth is mainly attributed to the increasing ED visits for fall-related extremity injuries along with the growing need for in-house admissions requiring long-term patient care and post-trauma rehabilitation services. According to the Centers for Disease Control and Prevention (CDC) report, the number of emergency department visits in the U.S. were reported at 136.3 million in 2016, of which approximately 40.2 million visits were injury-related ED visits which increased to 45.8 million in 2018. This factor is expected to drive the market over the forecast period. As per WHO in 2018, the growing incidence of injuries resulting from falls and increase in mortality rate with an estimated 646,000 fall-related annual deaths with more than 80.0% deaths registered in low and middle-income countries is increasing the demand for specialized care for critical victims.

Moreover, over the past ten years, there has been an increase in the incidence of accident-related deaths. An increase in ED visits by

patients with accident-related injury has been registered. As per the 2019 WHO report, approximately 1.4 million deaths are registered each year caused by road traffic crashes/ traumatic car crash injuries. The WHO has further reported that about 93.0% of the global road fatalities occur in low- and middle-income countries accounting for about 60.0% of the world's vehicles. The estimated average cost of in-patient care offered to a patient at trauma centers in the U.S. valued at approximately USD5, 590 in 2018.

Furthermore, the introduction of acute in-patient rehab facilities in acute care hospitals or standalone trauma centers to address patients with specialized medical and rehabilitative needs are expected to drive market growth in the forecast years. With increasing survival rate for severe traumatic injuries, it has become essential that rehabilitative services should be offered by the acute hospital care systems so that critical patients in need can benefit from their expert rehabilitation physicians.

### Trauma Type Insights

In 2019, the falls segment held the largest market share of 42.9%. Whereas, burn injury followed by stab/wound/cut is expected to be the fastest-growing segment over the forecast period. In the Americas, trauma-related injuries in 2018 accounted for approximately one-third of all ED visits, and about 8.0% of overall in-house stays in the critical care centers. As per a research published by the CDC, a 25.0% reduction in the severe injury-related deaths has been registered among patients receiving care at trauma centers. Fall-related injuries are witnessed to be the most common cause of trauma accounting for approximately 45.0% of the overall trauma emergency department (ED) visits.

### Regional Insights

In 2019, North America accounted for the highest revenue share of 56.1% in the market. The presence of standalone trauma centers and well-established acute care hospitals and favorable reimbursement policies in the U.S. covering approximately 70.0% of the treatment cost under Medicare and Medicaid are some of the key factors contributing to the market growth in the region. In addition, the high adoption of personalized trauma care by injured patients and premium quality patient care offered by regional standalone trauma care centers is further contributing to market growth.