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Medical and surgical products

Medical and surgical (MedSurg) spending trends continue to reflect the influence of ambulatory growth, changing patient needs, and ongoing efforts to optimize product utilization. Compared to the winter 2026 analysis, category movement suggests continued demand across a broad range of MedSurg products, with shifts in spend reflecting changes in care delivery, patient acuity, and purchasing patterns.

Spending patterns indicate sustained demand for products supporting outpatient procedures, injectable medication utilization, and patient care needs associated with chronic disease management, skin integrity, and aging populations. At the same time, standardization initiatives and evolving care models continue to influence category-level spending. Together, these trends highlight how utilization patterns are evolving across the continuum of care.

Top 15 MedSurg product spend categories

Rank	Product spend category	Portion of spend (%), summer 2026	Portion of spend (%), winter 2026[a]	Percentage point change[b]
1	IV pumps, tubing, and solutions	11.7	11.4	+0.3 ↑
2	Custom procedure trays	4.8	5.4	-0.6 ↓
3	Pulse oximetry	4.0	4.3	-0.3 ↓
4	Ophthalmic products	3.6	3.2	+0.4 ↑
5	Advanced wound care	3.4	3.4	—
6	Exam gloves	3.1	3.0	+0.1 ↑
7	Urinary catheters and devices	2.8	2.8	—
8	Regenerative biologic medicine	2.6	2.5	+0.1 ↑
9	Dialysis	2.2	2.5	-0.3 ↓
10	Standard needles and syringes	2.2	1.8	+0.4 ↑
11	Pressure redistribution products	1.9	2.1	-0.2 ↓
12	IV catheters	1.8	1.7	+0.1 ↑
13	Surgical gloves	1.6	1.5	+0.1 ↑
14	**Incontinence products**	**1.6**	—	**new**
15	Infusion therapy kits	1.5	1.6	-0.1 ↓

Source: Vizient Supply Analytics, April 2025–March 2026
[a] Previously ranked in the summer 2025 Outlook, with data analyzed from October 2024–September 2025
[b] Arrows indicate increase (↑) or decrease (↓) since the winter 2026 edition.

Category movements

Increases in spend

- **Ophthalmic products (+0.4%):** Reflects sustained demand for high-volume outpatient and ambulatory surgery center-based procedures (e.g., cataract, glaucoma, and anterior-segment surgery), supported by aging demographics, procedural throughput, and continued ambulatory surgical growth.

- **Standard needles and syringes (+0.4%):** Reflects sustained injectable medication utilization growth in outpatient administration and ongoing site-of-care shifts. Sourcing dynamics within this globally exposed category—including U.S. Food and Drug Administration scrutiny of certain imported syringes and tariff-related uncertainty—also may be influencing supplier selection and relative spend.

Decreases in spend

- **Custom procedure trays (-0.6%):** Reflects continued tray standardization, preference card optimization, and shifts in procedural mix. As organizations reduce unnecessary components and migrate appropriate cases to ambulatory settings, tray spend may decline as a share of MedSurg spend even while overall procedural volume remains stable.

New to the top 15

- **Incontinence products:** Reflects aging patient populations, increased acuity, and continued emphasis on catheter avoidance and skin integrity management. Demand for incontinence-related products is increasing as organizations prioritize prevention of moisture-associated skin damage and reduce unnecessary indwelling catheter use.

What these shifts may indicate

- Ambulatory and outpatient growth continue to influence spending patterns across several top MedSurg categories.

- Standardization efforts remain a meaningful driver of category-level spend shifts.

- Changing patient populations and care models continue to create demand in emerging product categories.

Learn more about how these category movements connect to broader trends by visiting the **Spend Management Outlook**.