Endoscopic Spinal Surgery Market By Product Type (Endoscopes, Endoscopic Devices), By Procedure type (Transforaminal Endoscopic Procedures, Interlaminar Endoscopic Procedures, Endoscopic Posterior Foraminotomy and Cervical Discectomy, Endoscopic Visualized Rhizotomy), By End User (Hospital and Clinics, Ambulatory Surgical Centers, Others): Global Opportunity Analysis and Industry Forecast, 2024-2035

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Abstracts

The Endoscopic Spinal Surgery Market was valued at $690.3 million in 2023, and is projected to reach $1612.87 millionby 2035, exhibiting a CAGR of 7.3% from 2024 to 2035.Endoscopic spinal surgery is a minimally invasive procedure used to treat spinal conditions such as herniated discs, spinal stenosis, and degenerative disc disease. This technique involves inserting a small tubular endoscope through a tiny incision, allowing surgeons to visualize and operate on the spine with minimal disruption to surrounding muscles and tissues.

The growth of the endoscopic spinal surgery market is driven by rise in prevalence of spinal disorders, surge in preference toward minimally invasive techniques, and development healthcare infrastructure in emerging countries. The rise in prevalence of spinal disorders, including herniated discs, spinal stenosis, facet joint syndrome, and degenerative disc disease, drives the growth of the endoscopic spinal surgery market. According to a 2024 article by the National Library of Medicine, up to 15%–40% of patients with chronic low back pain have facet joint syndrome. Factors such as an aging population, sedentary lifestyles, and increase in obesity rates contribute to a higher

incidence of spinal disorders leading to a rise in demand for minimally invasive treatment options. Endoscopic spinal surgery offers advantages such as reduced postoperative pain, shorter hospital stays, and faster recovery times compared to traditional open spine surgeries, making it an attractive option for both patients and healthcare providers. Thus, surge in prevalence of spinal disorders contributes significantly to the increase in demand for endoscopic spinal surgery.

Furthermore, rise in preference for minimally invasive procedures drives the endoscopic spinal surgery market expansion. According to a 2024 article by the National Library of Medicine, over the past 50 years, there has been immense growth in the number of minimally invasive spine surgeries. Patients and healthcare providers increasingly favor these procedures due to their advantages over traditional open surgeries, including smaller incisions, reduced blood loss, shorter hospital stays, and faster recovery times. Minimally invasive endoscopic spinal surgeries lower the risk of complications such as infections and postoperative pain, improving overall patient outcomes. Rise in prevalence of spinal disorders, including herniated discs, spinal stenosis, and degenerative disc disease, further accelerates demand for these advanced procedures. Technological advancements in endoscopic instruments, imaging systems, and robotic-assisted surgical techniques enhance precision and safety, making these procedures more effective and accessible.

In addition, an aging population with a higher incidence of spine-related conditions contributes to market growth, as older patients prefer less invasive treatments with reduced recovery periods. The shift toward outpatient settings and ambulatory surgical centers supports the adoption of minimally invasive techniques, as they enable cost savings for both patients and healthcare facilities.

Furthermore, the growth of the endoscopic spinal surgery market is driven by increased healthcare expenditure and infrastructure development, enabling wider adoption of advanced surgical techniques. According to India Brand Equity Foundation, the public healthcare expenditure of India increased to 2.2% of GDP in FY 2023 as compared to 1.6% of GDP in 2021. Rise in healthcare budgets, particularly in developed and emerging economies, has facilitated significant investments in medical technology, allowing hospitals and surgical centers to acquire state-of-the-art endoscopic equipment. Governments and private healthcare providers prioritize minimally invasive procedures due to their benefits, including reduced recovery time, lower postoperative complications, and decreased hospital stays, which align with cost-efficiency goals in modern healthcare systems. Infrastructure development plays a crucial role in expanding access to endoscopic spinal surgery. The construction of specialized surgical centers and the modernization of existing healthcare facilities have enhanced the availability of advanced spinal procedures. In addition, improved training programs for surgeons and the integration of digital platforms for remote consultations and surgical planning have contributed to the rise in adoption of endoscopic spinal procedures.

The endoscopic spinal surgery market is segmented on the basis of product type, procedure type, end user, and region. On the basis of product type, the market is bifurcated into endoscopes and endoscopic devices. On the basis of procedure type, the market is divided into transforaminal endoscopic procedures, interlaminar endoscopic procedures, endoscopic posterior foraminotomy & cervical discectomy, and endoscopic visualized rhizotomy. On the basis of end user, the market is segregated into hospitals & clinics and ambulatory surgical centers. On the basis of region, the market is analyzed across North America (U.S., Canada, and Mexico), Europe (Germany, France, UK, Italy, Spain, and rest of Europe), Asia-Pacific (Japan, China, Australia, India, South Korea, and rest of Asia-Pacific), and LAMEA (Brazil, Saudi Arabia, South Africa, and rest of LAMEA).

Major key players that operate in the global endoscopic spinal surgery market are Johnson & Johnson, Medtronic Plc, Arthrex, Stryker Corporation, Highridge Inc, Olympus Corporation, Karl Storz GmbH & Co. KG, Richard Wolf, Globus Medical Inc, Endovision Co. Ltd, and Jiomax Inc. Key players have adopted strategies such as partnership, product launch, and product approval for expanding their product portfolio.

Key Benefits for Stakeholders

This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the endoscopic spinal surgery market analysis from 2023 to 2035 to identify the prevailing endoscopic spinal surgery market opportunities.

The market research is offered along with information related to key drivers, restraints, and opportunities.

Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-buyer network.

In-depth analysis of the endoscopic spinal surgery market segmentation assists to determine the prevailing market opportunities.

Major countries in each region are mapped according to their revenue contribution to the global market.

Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

The report includes the analysis of the regional as well as global endoscopic spinal surgery market trends, key players, market segments, application areas, and market growth strategies.

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Key Market Segments

By Product Type

- Endoscopes
- Endoscopic Devices

By Procedure type

- Transforaminal Endoscopic Procedures
- Interlaminar Endoscopic Procedures
- Endoscopic Posterior Foraminotomy and Cervical Discectomy
- Endoscopic Visualized Rhizotomy

By End User

- Hospital and Clinics
- Ambulatory Surgical Centers
- Others

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By Region

- North America
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  - Canada
  - Mexico
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Spain
  - Rest of Europe
- Asia-Pacific
  - Japan
  - China
  - Australia
  - India
  - South Korea
  - Rest of Asia-Pacific

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LAMEA

- Brazil
- Saudi Arabia
- South Africa
- Rest of LAMEA

Key Market Players

- Richard Wolf GmbH
- Joimax GmbH
- Medtronic Plc
- Olympus Corporation
- Stryker Corporation
- Endovision Co., Ltd.
- Johnson & Johnson
- Arthrex, Inc.
- Karl Storz GmbH & Co. KG
- Globus Medical Inc
- Highridge Inc.

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