

Global Disposable Endoscope Market: Analysis By Application (GI Endoscopy, Bronchoscopy, Urologic Endoscopy, Arthroscopy, ENT Endoscopy and Others), By End User (Hospitals, Diagnostic Centers and Others), By Region Size & Forecast with Impact Analysis of COVID-19 and Forecast up to 2028

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Abstracts

Disposable endoscopes are medical devices used by healthcare professionals to examine the interior of a patient's body, typically the gastrointestinal tract, respiratory tract, or urinary tract. These endoscopes are sterile, ready-to-use devices, ensuring patient safety and reducing the risk of cross-contamination and infection transmission. Disposable endoscopes are either put into the body by incisions, particularly in the case of arthroscopy, or through natural openings or cavities (such as the anus and mouth). In 2022, the global disposable endoscope market was valued at US\$1.58 billion, and is probable to reach US\$4.11 billion by 2028.

The growing incidences of hospital-acquired infections (HAI) due to the usage of infected endoscopes is expected to be the key factor driving the global disposable endoscope market during the forecast period. Furthermore, increased investments, finances, and grants by governments and other organizations to enhance healthcare infrastructure and endoscopic research fields have generated attractive potential prospects for the market. The global disposable endoscope market value is projected to grow at a CAGR of 17.31%, during the forecast period of 2023-2028.

Market Segmentation Analysis:

By Application: According to the report, the global disposable endoscope market is

segmented into six applications: GI endoscopy, bronchoscopy, urologic endoscopy, arthroscopy, ENT endoscopy and others. GI endoscopy segment acquired majority of share in the market in 2022, as the incidence of these disorders increases, the need for diagnostic procedures like endoscopy also rises. Whereas, urologic endoscopy segment has the fastest CAGR, due to increasing number of ureteroscopy procedures owing to high disease burden. Furthermore, availability of robust product portfolio of technologically advanced ureteroscopes has created a lucrative growth potential for disposable endoscope market.

By End User: According to the report, the global disposable endoscope market is segmented into three end users: hospitals, diagnostic centers and other end users. Hospitals segment acquired majority of share in the market in 2022 due to factors such as rising awareness, higher cleaning costs, and increasing reprocessing failures are resulting in the adoption of disposable endoscopes in hospitals. Whereas, diagnostic centers segment has the fastest CAGR because of increase in incidence of cancers, and rise in awareness regarding diagnosis of diseases at early stage. Rise in healthcare expenditure also boost the growth of diagnostic centers segment in disposable endoscopes market share.

By Region: The report provides insight into the disposable endoscope market based on the geographical operations, namely North America, Europe, Asia Pacific, and Rest of the World. North America disposable endoscope market enjoyed the highest market share in 2022, due to strong presence of key players and availability of approved disposable endoscopes with higher adoption of disposable endoscopes. Minimally invasive procedures have become increasingly popular due to reduced patient recovery times and lower risks compared to traditional surgeries. Because of the enormous number of market participants and the varied strategic efforts made by them, the US is the largest market in North America, as the majority of players first sought FDA clearance to launch their product in the nation.

Asia Pacific is anticipated to witness lucrative CAGR throughout the forecast period and is robust growth is accounted to the high burden of target diseases, and larger population pool is likely to provide traction to region's expansion. Furthermore, the greater transition from reusable to disposable endoscopes in region and an increase in epidemiological factors hold the high promise for region's growth in the future.

Global Disposable Endoscope Market Dynamics:

Growth Drivers: Chronic diseases, such as gastrointestinal disorders, respiratory

diseases, cardiovascular diseases, and certain types of cancer, often require regular monitoring and diagnostic procedures. Endoscopy is a common diagnostic technique used to visualize and examine the interior of organs and body cavities. In chronic disease cases, patients might need frequent endoscopic examinations. Therefore, augmenting the demand for disposable endoscopes globally. Further, the market is expected to increase due to upsurge in healthcare expenditure, aging population, rising preference of single use endoscopes over traditional endoscopes, rise in hospital-acquired infections (HAI), increasing adoption of minimally invasive procedures, etc.

Challenges: The market's expansion is projected to be hampered by shortage of trained doctors. Developing countries often face a shortage of skilled physicians and endoscopists that perform endoscopic procedures. These procedures require expertise and experience to ensure accurate diagnosis and safe execution. The lack of skilled personnel limits the adoption and utilization of disposable endoscopes in these regions. The other challenges that disposable endoscope market faces include high cost, etc.

Trends: One of the most distinct and pervasive trends observed in the global disposable endoscope market is surging investments by governments and other organizations. Governments around the globe are taking initiatives to improve healthcare services and lessen chronic illness burdens. These initiatives have propelled market expansion and raised the demand for disposable endoscopes. Market players are investing in the development of safer and cost-effective medical devices including disposable arthroscopes, disposable bronchoscopes, and disposable gastroscopes. More trends in the market are believed to augment the growth of disposable endoscope market during the forecasted period include, technological advancements, sustainability, etc.

Impact Analysis of COVID-19 and Way Forward:

The pandemic of COVID-19 had a negative impact on the disposable endoscope business. Several hospitals and healthcare facilities globally experienced a significant decline in patient visits for diagnosis and treatment of gastrointestinal disorders, other chronic conditions and minimally invasive procedures. Moreover, healthcare facilities faced financial strain due to increased expenditures on personal protective equipment (PPE), testing kits, and other essential supplies related to COVID-19. This financial pressure often resulted in budget cuts for non-essential medical equipment, including disposable endoscopes. Additionally, the pandemic disrupted global supply chains, affecting the production and distribution of medical devices, including disposable endoscopes.

Competitive Landscape and Recent Developments:

Global disposable endoscope market is moderately fragmented. Key players of global disposable endoscope market are:

Boston Scientific Corporation

Ambu A/S

Baxter International Inc. (Hill-Rom Holdings, Inc.)

Olympus Corporation

Flexicare (Group) Limited

Richard Wolf GmbH

CooperSurgical, Inc. (OBP Medical Corp)

Verathon Inc.

Coloplast

Parburch Medical Developments Ltd

OTU Medical Inc

The key players are constantly investing in strategic initiatives, such as new product launches, introducing their products to emerging markets and more, to maintain a competitive edge in this market. For instance, in September 2023, Ambu announced the launch of its new aScope 4 RhinoLaryngo Video System, a single-use flexible videoscope for the examination of the nose, throat, and larynx.

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