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Global Ambulatory Surgical Center Operating Room Integration Systems Market 2023

https://marketpublishers.com/r/GB2407D14ABCEN.html
Date: August 2023
Pages: 80
Price: US$ 2,750.00 (Single User License)
ID: GB2407D14ABCEN

Abstracts

The global laparoscopy and endoscopy devices market is valued at $24.49 billion in 2022 and is projected to reach $31.79 billion by 2029, growing at a CAGR of 3.7% from 2023 to 2029. This market includes devices for endoscopy, laparoscopy, and capsule endoscopy. Advancements in surgical systems and tools have increased the demand for minimally invasive surgeries, with laparoscopy and endoscopy devices playing a crucial role. Factors driving the market include the increasing prevalence of chronic diseases, benefits of minimally invasive surgeries, growing geriatric population, rising healthcare costs, technological advancements, and increasing surgical procedures. However, market growth is hindered by factors such as shortage of skilled professionals, lack of reimbursement frameworks in emerging markets, inadequate equipment in surgical settings, and resource shortages in public referral hospitals. Opportunities for growth include mergers and acquisitions, diversification of endoscopic portfolios, investments, and regional expansion. The COVID-19 pandemic has moderately impacted the market, with the shutdown of elective surgeries and delayed installations negatively affecting market growth in 2020.

Market Segmentation
The market is segmented based on various factors, including type, product, end user, and region.

Segmentation by Type
General Surgery
Cardiac Surgery
Gynecology Surgery
Orthopedic Surgery
Urology Surgery

Neurological Surgery
Others

Segmentation by Product
Endoscopes and Endoscopic Imaging Systems - Rigid Endoscopes and Flexible Endoscopes
Video and Visualization Systems - Endoscopy Cameras, Display and Monitors, Video Convertors, and Video Recorders
Instruments and Accessories - Insufflators, Irrigation Systems, Procedure Kits, Endoscope Top Protector, Tubing and Water Systems, Forceps, Retrieval Kit, Injection Needle, and Others
Capsule Endoscopy Devices - Workstation and Data Recording, Capsule, and Othe
Others

Segmentation by End User
Hospitals
Ambulatory Surgery Centers (ASCs)
Others

Segmentation by Region
North America - U.S. and Canada
Europe - Germany, U.K., Spain, Italy, France, Netherlands, Belgium, and Rest-of-Europe
Asia-Pacific - Japan, China, South Korea, India, Australia and New Zealand, Malaysia, Singapore, and Rest-of-Asia-Pacific
Latin America - Brazil, Mexico, and Rest-of-Latin America
Middle East and Africa - K.S.A., U.A.E., Israel, and Rest-of-Middle East and Africa

General surgery encompasses the management of patients with various diseases that may require surgical intervention. The field has seen growth due to increasing incidences of conditions like colon cancer and thyroid disease. Colorectal cancer, specifically, has seen a significant increase in cases among young adults. Minimally invasive approaches have also made procedures like esophagectomy more common. The demand for general surgery has risen due to an aging population and increased healthcare utilization. The global general surgery segment is expected to grow at a CAGR of 2.1% from 2023 to 2029.

Hospitals are the dominant setting for laparoscopy and endoscopy device utilization, with private hospitals leading the way. They hold a significant market share due to their adoption of these procedures. Factors like the prevalence of chronic diseases and improvements in healthcare infrastructure contribute to this growth. However, the high cost and learning curve for surgeons limit availability to high-end private hospitals and clinics. Efforts to reduce healthcare costs are leading to an increase in outpatient centers for inpatient procedures.

North America and Europe currently have the largest markets for these devices, but developing countries are expected to adopt them rapidly. North America, with its advanced healthcare system and aging population, holds the majority share and is projected to maintain this position. The market in North America is expected to grow at a moderate rate. Asia-Pacific is the second-largest market and is projected to increase its share, while Europe is expected to hold a smaller share. The presence of global and regional companies, along with the prevalence of chronic diseases, drives growth in these regions. However, changes in regulations may impact market growth.

Competitive Landscape

The global laparoscopy and endoscopy devices market has seen significant strategic and technological advancements from various market players. These include funding activities, mergers and acquisitions, partnerships, alliances, expansions, regulatory initiatives, and new product introductions. Companies have focused on new product development, partnerships, and expanding their operations. Key companies in the market include Ambu A/S, Arthrex Inc., B.Braun Melsungen AG, Boston Scientific Corporation, CONMED Corporation, Cook Medical LLC, FUJIFILM Holdings Corporation, HOYA Corporation, Johnson & Johnson, KARL STORZ SE & Co. KG, Laborie, Olympus Corporation, Richard Wolf GmbH, Smith & Nephew plc, Stryker Corporation, CapsoVision Inc., and Medtronic plc.

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