

Endoscopic Retrograde Cholangiopancreatography Market Size, Share & Trends Analysis Report By Product (Endoscopes, Endotherapy Devices), By Procedure (Biliary Sphincterotomy, Pancreatic Sphincterotomy), By End-use, By Region, And Segment Forecasts, 2024 - 2030

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Abstracts

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Market Size & Trends

The global endoscopic retrograde cholangiopancreatography market size was estimated at USD 1.98 billion in 2023 and is anticipated to grow at a CAGR of 8.3% from 2024 to 2030. This growth is majorly driven by the rising incidence of pancreatic and biliary diseases such as gallstones, pancreatitis, and bile duct obstructions fueling the demand for endoscopic retrograde cholangiopancreatography (ERCP) procedures. As the population ages and lifestyles change, the prevalence of these conditions is expected to increase, driving market growth. According to the Clinical Gastroenterology and Hepatology study published in February 2024, there is an estimated 6% prevalence of gallstones globally, with higher rates observed in females and South America. According to studies, the incidence rate of gallstones is anticipated to rise sharply over the forecast period, thereby driving the demand for ERCP procedures.

Furthermore, advancements in endoscopic technology have improved the safety and efficacy of ERCP procedures. For instance, in January 2023, Advantech introduced the MIO-5377R single-board computer as a groundbreaking innovation in the field of

endoscope technology. This compact and powerful device is designed to address the traditional challenges faced by endoscopes, offering enhanced performance, reliability, and functionality. Moreover, innovations such as high-definition imaging, better maneuverability of endoscopes, and the development of therapeutic accessories have made ERCP a more precise and effective diagnostic and treatment tool. These technological advancements are attracting both healthcare providers and patients to opt for ERCP procedures.

The rise in the adoption of minimally invasive surgical techniques has led to an increased demand for ERCP procedures, which is expected to drive growth in the industry in the upcoming years. For instance, according to the American Cancer Society's annual report published in January 2024, an estimated 41,630 new cases of liver cancer are expected to be diagnosed in the U.S. Additionally, as per the same source, liver cancer is more prevalent in countries in sub- Southeast Asia and Saharan Africa compared to the U.S. It is the most common type of cancer in many of these nations, with over 800,000 new cases diagnosed globally each year. Additionally, liver cancer ranks as a leading cause of cancer-related deaths worldwide, claiming more than 700,000 lives annually.

The high burden of cholangiocarcinoma and hepatocellular carcinoma is expected to boost the demand for endoscopic retrograde cholangiopancreatography for the early detection of such malignancies.

Moreover, the increased awareness about the benefits of early diagnosis and treatment of pancreatic and biliary diseases has led to a higher demand for minimally invasive procedures such as ERCP. For instance, in October 2023, the Biliary Atresia Awareness Committee launched Biliary Atresia Awareness Campaign under the auspices of Gauteng Provincial Solid Organ Transplant Division and the University of the Witwatersrand at Charlotte Maxeke Academic Hospital. The campaign was aimed to raise awareness and support for children affected by biliary atresia, a rare and life-threatening liver disease that affects infants by obstructing or obliterating bile ducts. The initiative was focused on educating diverse demographics about biliary atresia, offering resources and support to affected families, advancing research for diagnostic tools and treatments, and fostering collaboration with medical entities globally.

The aging population is a significant factor driving the growth of the ERCP market. As the global population continues to age, there is a growing demand for these procedures, including surgeries that require blood transfusions. Chronic diseases such as coagulopathy, anemia, and surgical blood seeking continue to increase along with

the increase in adult population. Currently, there are over 40 million people in the U.S. alone above 65 years and the number are expected to double by 2050. Japan provides potential growth opportunities in this market due to the presence of the highest geriatric population in the globe. According to WHO, the percentage of the geriatric population is expected to reach 22.0% by 2050.

Additionally, several healthcare organizations are adopting initiatives including partnerships for the R&D of innovative products, thereby fueling the market growth. For instance, according to a research study published in Optica Publishing Group journal in July 2022, researchers at the School of Biomedical Engineering & Imaging Sciences developed a photoacoustic imaging endoscope probe which can be inserted into a medical needle with an inner diameter as small as 0.6 millimeters. They also suggested that artificial intelligence (AI) could be utilized to accelerate imaging procedures.

Furthermore, the strategic initiatives adopted by the market players, such as mergers, and acquisitions, and product launches are projected to drive the market over the forecast period. For instance, in April 2022, Olympus partnered with EndoClot Plus, a company that focuses on developing technologies in the hemostasis space. One of the key products in EndoClot Plus' portfolio is the EndoClot PHS, a nonthermal, nontraumatic method for achieving hemostasis with gastrointestinal (GI) bleeds. This agreement aims to make the EndoClot PHS more accessible to gastroenterologists, enabling them to stop bleeding rapidly and reliably during medical procedures.

Global Endoscopic Retrograde Cholangiopancreatography Market Report Segmentation

This report forecasts revenue growth at global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2018 to 2030. For this study, Grand View Research has segmented the global endoscopic retrograde cholangiopancreatography market report based on product, procedure, end-use, and region:

Product Outlook (Revenue, USD Million, 2018 - 2030)

Endoscopes

Endotherapy Devices

Sphincterotomes

Lithotripter

Stents

Cannulas

Forceps

Snares

Catheters

Guiding Wires

Balloons

Baskets

Visualization Systems

Energy Devices

Others

Procedure Outlook (Revenue, USD Million, 2018 - 2030)

Biliary Sphincterotomy

Biliary Stenting

Biliary Dilatation

Pancreatic Sphincterotomy

Pancreatic Duct Stenting

Pancreatic Duct Dilation

End use Outlook (Revenue, USD Million, 2018 - 2030)

Hospitals

Outpatient Facilities

Regional Outlook (Revenue, USD Million, 2018 - 2030)

North America

U.S.

Canada

Mexico

Europe

UK

Germany

France

Italy

Spain

Norway

Sweden

Denmark

Asia Pacific

Japan

China

India

Australia

South Korea

Thailand

Latin America

Brazil

Argentina

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

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