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Endoscopy Devices Global Market - Forecast To 2028

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Abstracts

Endoscopy is a minimally invasive or non-invasive medical procedure that utilizes specialized devices like endoscopes for the detailed inspection or assessment, and manipulation or treatment of diseased organs or tissues by visualizing the internal organ or area of interest. The constantly advancing various emergency or elective endoscopy procedures are being used for the timely diagnosis, and minimally-traumatic treatment of various chronic ailments like cancer, arthritis, joint injuries, inflammatory bowel diseases (IBD), chronic pancreatitis, obesity, Barrett's esophagus, and others.

As estimated by IQ4I analysis, the endoscopy devices global market is expected to reach $39,475.6 million by 2028 growing at a high single digit CAGR from 2021 to 2028 due to persistently escalating prevalence, and incidence of chronic diseases across the globe, and the need for early diagnostic, and therapeutic interventions, increasing inclination of patients towards the minimally invasive therapeutic procedures, gradual transition of endoscopy devices market towards single-use endoscopes, the emergence of technologically advanced endoscopy products, the trend of acquisitions, and collaborations in the endoscopy device industry, and the increasing awareness, and adoption of the highly beneficial endoscopic procedures across the emerging nations.

The endoscopy devices global market is categorized into various market segments based on the product, application, end-users, and geography. Based on the type of endoscopy products, the market is segmented into endoscopes, endoscopic instruments, and endoscopic accessories. Among these, the Endoscopic Instruments segment held the largest share in 2021, and is expected to grow at a mid single digit CAGR from 2021 to 2028 due to the increasing popularity of image-guided endoscopic surveillance, diagnostic, and therapeutic procedures to reduce morbidity, and mortality associated with the highly prevalent chronic diseases across the globe, and the necessity of the various endoscopy instruments to ensure the efficiency, safety, and completeness of an endoscopy procedure. Endoscopes segment is the fastest

emerging segment growing at a high single digit CAGR from 2021 to 2028 due to the escalating demand for timely, and precise minimally invasive or non-invasive diagnostic, and therapeutic procedures from the large chronic disease patient pool across the globe, various technological, and fabrication advancements in endoscopes that are constantly expanding their diagnostic, and therapeutic application spectrum. Based on the product type, endoscopes have been further segmented into flexible endoscopes, rigid endoscopes, robot-assisted endoscopes, and AI-enhanced endoscopes, and capsule endoscopes. Among these, the Rigid Endoscopes segment occupy a major share in 2021 and is expected to grow at a high single digit CAGR from 2021 to 2028 due to increased utilization of rigid endoscopes for performing the highly popular endoscopic diagnostic, and therapeutic procedures like laparoscopy, arthroscopy, ENT endoscopy, and neuroendoscopy procedures, and the potential of rigid endoscopes to offer the best resolution, optical amplification, and larger field of view to perform various endoscopic procedures efficiently, and safely. Robot-Assisted Endoscopes, and artificial intelligence (AI) powered endoscopes segment is expected to be the fastest emerging segment growing with a double digit CAGR from 2021 to 2028 due to the emergence of several Robot Assisted Endoscopes, and AI guided endoscopy systems in the market, and the promising potential of robot-assisted endoscopes, and AI-enhanced endoscopy systems to mitigate the labor intensity of endoscopic procedures, and increase the precision, and safety of endoscopic procedures. Endoscopic instruments are further grouped into endoscopic cameras, digital documentation systems, light sources, monitors, and display systems, video converters, and processors, fluid management systems, and other endoscopic instruments comprised of insufflators, endoscopic ultrasound probes, and processors. Among the various endoscopic instruments, the Monitors, and display systems segment occupies a major share of revenue in 2021, and is expected to grow at a mid single digit CAGR from 2021 to 2028 due to the increasing utilization of highly accurate, and real-time images or videos to arrive at the optimum or error-free diagnostic conclusions, and to provide better clarity of the complex anatomical details to improve the precision, task efficiency, and productivity of surgeons during endoscopic therapeutic procedures, availability of technologically advanced monitors, and display units, and increasing popularity of image-guided minimally invasive endoscopic diagnostic, and therapeutic interventions among the masses. The digital documentation systems segment is expected to be the fastest-growing segment growing with a high single digit CAGR from 2021 to 2028 due to the increasing recognition of the importance of endoscopic image documentation or recording process as an integral aspect of endoscopy procedures to ensure the quality, safety, productivity, completeness, and efficiency of endoscopic procedures, and the various guidelines of major endoscopic societies like European Society of Gastrointestinal Endoscopy (ESGE), and American Society of

Gastrointestinal Endoscopy (ASGE) that recommend systematic photo recording or documentation of endoscopy procedures, the necessity of digitalized documents to address or satisfy the concerns of the insurance providers, legal institutions, patients, and hospital trusts, and need of digital documents to guide future therapeutic decisions, and persistent technological advancements in the digital documentation systems. Endoscopic accessories are further classified into product types like biopsy forceps, graspers, snares, Trocars, surgical dissectors, and other accessories like endoscopic ultrasound needles, light cables, cytology brushes, bite-blocks, cleaning brushes, needle holders, retractors, endoscopic caps, and hoods, endoscopy masks. Among the various endoscopic accessories, the trocars segment occupy the largest share of revenue in 2021, and is the fastest emerging segment growing at a high single digit CAGR from 2021 to 2028 due to the necessity of the channel created by a trocar for the safer advancement or passage of endoscopes, and other equipment to internal body cavities through the smaller incisions with low insertion force, and without tearing, scarring or ripping off the surrounding fragile tissues or organs during endoscopy procedures.

The global endoscopy devices market based on applications has been classified into Arthroscopy, Pulmonary endoscopy, Laparoscopy, ENT endoscopy, Gastrointestinal endoscopy, Gynecology or obstetrics endoscopy, Neuroendoscopy, Urological endoscopy, and other Endoscopic applications consisting of cardiopulmonary endoscopy, dental endoscopy, ophthalmology endoscopy, and breast endoscopy. Among these, the Gastrointestinal endoscopy segment occupied the largest market share in 2021, and is expected to grow at a mid single digit CAGR from 2021 to 2028 due to the persistently increasing prevalence of chronic diseases of the digestive tract, and the potential of gastrointestinal endoscopy to provide accurate diagnostic, and therapeutic solutions, increasing popularity of endoscopic surveillance as a preventive strategy for gastrointestinal cancer-associated morbidity, and mortality, and the ever-expanding diagnostic, and therapeutic application spectrum of gastrointestinal endoscopy procedures. The laparoscopy segment is the fastest emerging segment growing at a double digit CAGR from 2021 to 2028 due to the steadily escalating prevalence of chronic diseases of the digestive system, female reproductive system, and urinary tract system, and the potential of laparoscopy to provide accurate diagnostic, and therapeutic solutions, and the increasing research, and development activities leading to the emergence of numerous technologically advanced, patient-friendly, cosmetically advantageous laparoscopic procedures. The arthroscopy market is further segmented into knee arthroscopy, shoulder arthroscopy, wrist arthroscopy, ankle arthroscopy, elbow arthroscopy, hip arthroscopy, and other arthroscopy procedures consisting of spinal arthroscopy, and temporomandibular joint arthroscopy.

Among these, the knee arthroscopy segment accounted for the largest revenue in 2021, and is expected to grow at a double digit CAGR from 2021 to 2028 due to the persistently elevating prevalence of knee joint injuries especially related to sports, and increasing adoption of arthroscopy to provide premium diagnostic, and accurate therapeutic solutions. The hip arthroscopy segment is the fastest emerging segment growing at a double digit CAGR during the forecasted period due to the ever-escalating prevalence of hip injuries associated with sports or accidents, increasing popularity of hip arthroscopy procedures across the globe, and the increasing research focus for the development of more efficient, and safer hip arthroscopy products. The pulmonary endoscopy market is further classified into bronchoscopy, thoracoscopy, and mediastinoscopy. Among these, the bronchoscopy segment accounted for the largest revenue in 2021, and is the fastest emerging segment growing at a mid single digit CAGR from 2021 to 2028 due to the persistently escalating prevalence of chronic diseases of the lungs or bronchi, increasing utilization of bronchoscopy to provide premium diagnostic, and accurate therapeutic solutions, the ever-expanding diagnostic, and therapeutic spectrum of bronchoscopy, and the increasing research focus for the development of more efficient, and safer bronchoscopy products. The ENT endoscopy market is further categorized into nasal endoscopy, laryngoscopy, otoendoscopy, and transnasal endoscopy procedures. Among these, the nasal endoscopy segment accounted for the largest revenue in 2021, and is expected to grow at a mid single digit CAGR from 2021 to 2028 due to the constantly escalating prevalence of chronic diseases associated with nasal cavity, and sinus passages, and increasing adoption of nasal endoscopy to provide optimum diagnostic, and therapeutic solutions. The laryngoscopy segment is the fastest emerging segment growing at a mid single digit CAGR from 2021 to 2028 due to the ever elevating prevalence of chronic diseases associated with throat, larynx, and salivary gland, increasing popularity of laryngoscopy procedures across the globe, and the increasing research focus for the development of more efficient, and laryngoscopy products. The gastrointestinal endoscopy market is further segmented into Esophagogastroduodenoscopy, enteroscopy, colonoscopy, sigmoidoscopy, proctoscopy, and Cholangiopancreatoscopy procedures. Among these, the esophagogastroduodenoscopy segment accounted for the largest revenue in 2021, and is expected to grow at a mid single digit CAGR during the forecasted period due to the persistently escalating chronic diseases affecting the esophagus, stomach, duodenum, increasing adoption of esophagogastroduodenoscopy to provide optimized, and timely diagnostic, and therapeutic solutions, and the emergence of more efficient, and safer technologically advanced esophagogastroduodenoscopy products. The colonoscopy segment is the fastest emerging segment growing at a high single digit CAGR from 2021 to 2028 due to the ever-increasing prevalence of chronic diseases of the colon, and rectum, increasing adoption, and implementation of colonoscopic surveillance as a preventive strategy for colorectal cancer-associated morbidity, and mortality across the globe, and the increasing research focus for the development of more efficient, and colonoscopy products. The gynecological/obstetrics endoscopy market is further classified into Hysteroscopy, Colposcopy, Falloposcopy, and others comprised of amnioscopy, and fetoscopy procedures. Among these, the hysteroscopy segment accounted for the largest revenue in 2021, and is the fastest emerging segment growing at a mid single digit CAGR from 2021 to 2028 due to the steadily escalating prevalence of endocervical or intrauterine diseases, increasing utilization of hysteroscopy to provide precise diagnostic, and therapeutic solutions, the ever-expanding diagnostic, and therapeutic spectrum of hysteroscopy, and the increasing research focus for the development of more efficient, and safer hysteroscopy products. The neuroendoscopy market is further subdivided into epiduroscopy or spinal endoscopy, Intraventricular neuroendoscopy, Transcranial neuroendoscopy, and Transnasal neuroendoscopy procedures. Among these, the intraventricular neuroendoscopy segment accounted for the largest revenue in 2021, and is expected to grow at a mid single digit CAGR from 2021 to 2028 due to the persistently elevating prevalence of ventricular system associated diseases, and increasing adoption of intraventricular neuroendoscopy to provide accurate diagnostic, and accurate therapeutic solutions. The transcranial neuroendoscopy segment is the fastest emerging segment growing at a high single digit CAGR during the forecasted period due to the ever-escalating prevalence of anterior skull base region associated diseases, increasing popularity of transcranial neuroendoscopy procedures across the globe, and the increasing research focus for the development of more efficient, and safer transcranial neuroendoscopy products. The urological endoscopy market is further categorized into Nephroscopy, Cystoscopy, ureteroscopy, and resectoscopy procedures. Among these, the ureteroscopy segment accounted for the largest revenue in 2021, and is the fastest emerging segment growing at a high single digit CAGR from 2021 to 2028 due to the constantly elevating prevalence of chronic diseases associated with ureters, and kidney, increasing utilization of ureteroscopy to provide unerring diagnostic, and therapeutic solutions, the ever-expanding diagnostic, and therapeutic spectrum of ureteroscopy, and the increasing research focus for the development of more efficient, and safer ureteroscopy products. Laparoscopic procedures are further classified into laparoscopic bariatric surgery, cholecystectomy, appendectomy, hernia repair, and hand-assisted laparoscopic procedures. Among these, the laparoscopic cholecystectomy segment accounted for the largest revenue in 2021, and is expected to grow at a double digit CAGR from 2021 to 2028 due to the persistently elevating prevalence of gall bladder disorders, and increasing adoption of laparoscopic cholecystectomy to provide explicit diagnostic, and therapeutic solutions. The laparoscopic bariatric surgery segment is the fastest emerging segment growing at a double digit CAGR during the forecasted period due to the ever-escalating prevalence of obesity across the globe, increasing popularity of laparoscopic bariatric surgery across the globe, and the increasing research focus for the development of more efficient, and safer laparoscopic bariatric surgery products.

Based on the end-users, the endoscopy devices global market has been segmented into Hospitals, Endoscopy Ambulatory surgery centers (EASCs), Endoscopy Diagnostic Centers, and others consisting of Academic or Research Institutes, and Office based Endoscopy (OBE) suites. Among the various end-users, the Hospitals segment is the largest, and fastest emerging end-user and is expected to grow at a high single digit CAGR during the forecasted period due to the increased utilization of advanced endoscopy products in these clinical settings, the presence of a large number of sophisticated hospitals in the developed nations, and the constantly increasing number of hospitals with advanced infrastructural facilities in the developing nations.

The endoscopy devices global market is divided into four major geographies namely, North America, Europe, Asia Pacific (APAC), and the Rest of the World (ROW). Among these, North America occupied the largest share in the 2021 endoscopy devices global market, and is expected to grow at a mid single digit CAGR during the forecasted period. Persistently elevating chronic disease patient burden in the region, and elevating demand for the early diagnosis, and treatment of these diseases, escalating geriatric population burdened with numerous kinds of chronic diseases in the region, the increasing inclination, and adoption of technologically advanced diagnostic procedures, and minimally invasive therapeutic procedures by the patients of the region, availability of well-developed healthcare infrastructural facilities in the region, presence of several major endoscopy device companies in the region, and their increasing R&D investments in the region for the development of innovative, efficient, and safer endoscopy products, and a conducive regulatory, and reimbursement scenario in the region promoting the adoption of single-use endoscopes in the region are some of the factors that are propelling the endoscopy devices market growth in the region. Asia-Pacific region is the fastest emerging region and is expected of growing at a high single digit CAGR from 2021 to 2028. Steadily escalating chronic disease patient population in the region, and increasing demand for the prompt diagnosis, and treatment of these diseases, elevating geriatric population crippled with numerous kinds of chronic diseases in the region, increasing awareness, and demand for technologically advanced diagnostic procedures, and minimally invasive therapeutic procedures by the patients of the region, developing healthcare infrastructural facilities in the region, medical tourism prospects of some of the countries in the region, presence of several major endoscopy device companies in the region, and their increasing R&D investments for the development of innovative, efficient, and safer endoscopy products, presence of several domestic companies in the region offering endoscopy products at competitive prices, growing economies, and improving reimbursement scenario of these regions are some of the factors that are boosting the endoscopy devices market in the region

The endoscopy devices global market is a competitive market with more than half of the market being occupied by the top six players. Some of the key players of the endoscopy devices market are Olympus Corporation (Japan), Boston Scientific Corporation (U.S.), Stryker Corporation (U.S.), Karl Storz SE & Co KG (Germany), Johnson & Johnson (U.S.), and Medtronic PLC (Ireland), Arthrex Inc. (U.S.), B. Braun Melsungen AG (Germany), Fujifilm Holdings Corporation (Japan), Hoya Corporation (Japan), and other Arthrex Inc. (U.S.), B. Braun Melsungen AG (Germany), Fujifilm Holdings Corporation (Japan), Hoya Corporation (Japan), and others.

The report provides an in-depth market analysis of the above-mentioned segments across the following regions:

- North America
  - U.S.
  - Rest of North America
- Europe
  - Germany
  - France
  - U.K.
  - Rest of Europe
- Asia-Pacific
  - China
  - Japan
  - India

Rest of APAC

Rest of the World (ROW)

Brazil

Rest of LATAM

The Middle East and Others

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