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Endoscopic Retrograde Cholangiopancreatography (ERCP) Global Market Insights 2026, Analysis and Forecast to 2031

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Abstracts

Endoscopic Retrograde Cholangiopancreatography (ERCP) is a highly specialized medical procedure that combines the use of endoscopy and fluoroscopy to diagnose and treat conditions of the biliary or pancreatic ductal systems. It remains a cornerstone in the management of gallstones, inflammatory strictures, and various pancreaticobiliary malignancies. The global ERCP market is witnessing a period of significant technological refinement, moving toward higher precision imaging and disposable components to mitigate infection risks. As of 2026, the global ERCP market size is estimated to be between 1.7 billion USD and 3.0 billion USD. Looking forward to 2031, the market is projected to grow at a Compound Annual Growth Rate (CAGR) ranging from 3.2 percent to 5.9 percent. This growth is underpinned by the increasing prevalence of gastrointestinal disorders and a global shift toward minimally invasive therapeutic interventions.

The market in 2025 and 2026 has been marked by several landmark regulatory approvals and international medical initiatives. On October 21, 2025, Boston Scientific Corporation received both FDA 510(k) clearance and CE Mark approval for its Advanix Biliary Plastic Stents. These stents are designed for treating biliary strictures related to stone disease and confirmed malignancies, with a staggered global rollout starting in Europe and reaching the U.S. market in late 2025. Furthermore, the industry is seeing breakthroughs in scope maneuverability. On April 22, 2025, Dragonfly Endoscopy Inc. announced FDA clearance for the first-ever 360-degree Rotatable Pancreaticobiliary Scope System. This innovation is purpose-built to address the physical limitations of traditional endoscopes, allowing for better access to difficult-to-reach ducts. Beyond technology, the expansion of medical expertise into developing regions is noteworthy. In March 2026, a medical mission to Ghana delivered the first-ever specialized ERCP

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training in the country, signaling a long-term trend toward the global democratization of complex endoscopic procedures.

Regional Market Analysis

The regional distribution of the ERCP market reflects the maturity of healthcare infrastructures and the varying prevalence of pancreaticobiliary diseases.

North America: This region is a dominant force in the ERCP market, with an estimated market share ranging from 38 percent to 44 percent. The growth rate for North America is projected to be between 3.0 percent and 4.8 percent. Demand is driven by a high volume of procedures for chronic pancreatitis and gallstone-related complications. The recent FDA clearances for Boston Scientific and Dragonfly Endoscopy underscore the region's role as an early adopter of next-generation endoscopic systems. Furthermore, the presence of a well-established reimbursement framework for outpatient endoscopic procedures supports market stability.

Europe: Europe holds a significant market share, estimated between 24 percent and 30 percent, with a projected growth rate of 2.8 percent to 4.2 percent. The region is characterized by stringent safety regulations, which have accelerated the adoption of single-use endoscopes and advanced reprocessing systems. The CE Mark approval for the Advanix stent system in late 2025 has facilitated its rapid deployment across major European healthcare networks. The focus on cost-effectiveness in public healthcare systems remains a primary driver for the adoption of long-lasting, high-performance biliary stents.

Asia-Pacific: This region is expected to be the fastest-growing market, with an estimated CAGR of 4.5 percent to 6.8 percent. The regional share currently stands between 18 percent and 25 percent. Growth is fueled by the rapid expansion of hospital networks in China and India, coupled with a high prevalence of biliary tract infections and liver-related diseases. China is a major hub for the manufacturing of endoscopic accessories, with companies like Changzhou Health Microport Medical Device expanding their domestic and international reach. The medical landscape in Taiwan (China) is also recognized for its high standards of endoscopic research and clinical practice.

South America: The market in South America is estimated to grow at a rate of 3.2 percent to 5.0 percent. Brazil and Argentina are key markets where the

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demand for minimally invasive gastrointestinal surgery is rising. However, market growth is sometimes hampered by economic fluctuations that impact the procurement of expensive capital equipment like duodenoscopes.

Middle East and Africa (MEA): This region represents an emerging frontier for the ERCP market, with a projected growth rate of 3.5 percent to 5.5 percent. While currently holding a smaller market share, initiatives like the March 2026 medical training mission in Ghana highlight the untapped potential for ERCP services in Sub-Saharan Africa. The expansion of private healthcare in the Gulf region is also contributing to the demand for high-end endoscopic suites.

Application and Segmentation Analysis

The ERCP market is segmented primarily by the healthcare setting where the procedure is performed, each with distinct operational requirements.

Hospitals: Hospitals remain the primary end-user for ERCP systems, as the procedure often requires a multidisciplinary team including gastroenterologists, radiologists, and specialized nursing staff. Most therapeutic ERCPs, particularly those involving stone removal or stent placement in complex malignancy cases, are performed in inpatient settings where comprehensive follow-up care is available. Hospitals are the main drivers for capital equipment sales, such as high-definition endoscopy towers and C-arm fluoroscopy systems.

Ambulatory Surgery Centers (ASCs) & Clinics: There is a notable trend toward transitioning diagnostic and routine therapeutic ERCP procedures to ASCs. This shift is driven by the desire to reduce costs and improve patient throughput. ASCs are increasingly investing in specialized accessories and disposable scopes to minimize the overhead associated with complex sterilization processes. The rise of clinics specializing in gastrointestinal health is also expanding the reach of ERCP services in urban areas.

Product Segmentation - Endoscopes and Scopes: This segment includes duodenoscopes and the newer rotatable scopes. The trend toward 360-degree rotatability is expected to redefine the standards of ductal navigation.

Product Segmentation - Accessories: This includes stents (plastic and metal), catheters, guidewires, and stone extraction balloons. The approval of the

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Advanix plastic stents highlights the ongoing innovation in this high-volume, recurring revenue segment.

Value Chain and Industry Structure

The value chain of the ERCP market begins with the precision engineering of optical and electronic components. High-definition CMOS sensors and fiber-optic cables are critical raw materials. Manufacturers then integrate these components into endoscopes or produce specialized accessories like nitinol guidewires and polymer stents.

The midstream consists of global medical device conglomerates and specialized endoscopy firms. These players manage the complex regulatory approval processes (FDA/CE) and invest heavily in physician training and clinical support. Distribution is often handled through a combination of direct sales forces and specialized medical logistics providers who ensure that delicate instruments reach hospitals in sterile conditions.

The downstream end-users are the interventional endoscopists and healthcare facilities. A critical part of the modern ERCP value chain is the reprocessing and sterilization sector. As concerns over cross-contamination grow, the value chain has expanded to include specialized automated endoscope reprocessors (AERs) and third-party sterilization services. The industry structure is characterized by a few dominant players in the capital equipment space and a highly competitive, fragmented market for accessories and consumables.

Macroeconomic Analysis and Geopolitical Impacts

The ERCP market is influenced by broader macroeconomic factors such as healthcare spending as a percentage of GDP and the aging of the global population. High inflation in recent years has increased the cost of specialized materials like medical-grade plastics and precious metals used in electronic sensors. This has led to price increases for both capital equipment and single-use accessories.

Geopolitically, the market is sensitive to trade relations between major manufacturing hubs. China is a significant producer of endoscopic accessories, and trade tensions can impact the supply chain for hospitals in North America and Europe. Furthermore, the global shortage of semiconductor chips has occasionally impacted the lead times for high-end endoscopy processors. Geopolitical stability in regions like the Middle East is

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also crucial for the expansion of medical tourism and the development of regional centers of excellence for endoscopic surgery. The movement toward 'domestic sourcing' in large markets like China is encouraging local manufacturers to move up the value chain, creating more competition for established global brands.

Key Market Players and Company Developments

Olympus: As the global leader in the endoscopy market, Olympus holds a dominant position in the ERCP segment. The company’s duodenoscopes are considered the industry standard for pancreaticobiliary procedures. Olympus has focused heavily on addressing the challenges of endoscope reprocessing, introducing innovative designs with removable components to improve cleaning efficacy. Their commitment to R&D is evident in their high-definition imaging systems and the integration of AI-assisted diagnostic tools. Olympus maintains a vast global service network, providing essential technical support and training for gastroenterologists worldwide. Their market strategy involves a balance of high-end capital equipment and a comprehensive range of accessories, ensuring a presence across the entire ERCP procedure.

CONMED Corporation: CONMED is a major player in the surgical and gastroenterology markets, offering a wide array of ERCP accessories. Their product line includes specialized catheters, guidewires, and stone extraction devices designed for efficiency and ease of use. CONMED has been active in expanding its portfolio through internal innovation and strategic marketing. The company emphasizes the 'procedural solution' approach, providing clinicians with all the necessary tools to perform complex ductal interventions. Their focus on the North American and European markets is supported by a strong sales force and a reputation for providing reliable, high-quality consumables that meet the needs of high-volume endoscopy centers.

Fujifilm Holdings: Fujifilm has leveraged its long history in imaging technology to become a formidable competitor in the endoscopy space. Their ERCP systems are known for superior image quality and advanced color enhancement technologies that help clinicians identify subtle ductal abnormalities. Fujifilm has been a pioneer in the development of double-balloon endoscopy and has applied similar innovative thinking to its pancreaticobiliary scope systems. The company is also active in the move toward disposable endoscopes, offering solutions that address the growing demand for infection control. Their global reach and diversified business model provide them with the stability to invest in

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long-term technological breakthroughs.

HOYA Corporation (PENTAX Medical): Through its PENTAX Medical division, HOYA Corporation is a key provider of endoscopic solutions. PENTAX is recognized for its focus on ergonomic design and clinician-centric innovation. Their ERCP scopes and processors are designed to provide high-resolution imaging while maintaining ease of maneuverability. PENTAX has been proactive in collaborating with healthcare providers to develop solutions that improve clinical workflows and patient outcomes. The company has also made significant strides in the development of advanced reprocessing technologies and single-use components, positioning themselves well in a market that is increasingly focused on safety and hygiene standards.

KARL STORZ: This family-owned German company is a world leader in the field of endoscopy, including specialized systems for pancreaticobiliary care. KARL STORZ is known for its high-quality optics and the integration of 'OR1' digital operating room solutions. Their ERCP offerings include high-end visualization systems and a variety of specialized instruments. The company maintains a strong focus on educational support, providing extensive training programs for surgeons and medical staff. Their independence allows them to focus on long-term quality and innovation, often setting benchmarks for the rest of the industry in terms of durability and optical precision.

Ambu: Ambu has disrupted the endoscopy market with its focus on single-use, disposable endoscopes. In the ERCP segment, Ambu offers single-use duodenoscopes designed to eliminate the risk of patient-to-patient cross-contamination. This approach addresses one of the most significant challenges in modern ERCP—the difficulty of cleaning complex reusable scopes. Ambu's business model is built on high-volume production and cost-effective design, making single-use technology more accessible to hospitals and ASCs. Their rapid expansion into the pancreaticobiliary space has forced traditional players to accelerate their own disposable scope programs, significantly altering the competitive landscape.

Boston Scientific Corporation: Boston Scientific is a powerhouse in the medical device industry, particularly in the interventional cardiology and endoscopy sectors. Their October 2025 FDA clearance and CE Mark for the Advanix Biliary Plastic Stents further solidified their position in the ERCP market. Boston Scientific offers a comprehensive ecosystem for ERCP, including the SpyGlass

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DS II Direct Visualization System, which allows for high-definition imaging within the bile and pancreatic ducts. Their strategy focuses on providing therapeutic solutions for complex cases, backed by extensive clinical data and a global sales network. They are a primary innovator in the stent and balloon segments, consistently releasing products that improve the success rate of ductal clearance.

Johnson & Johnson: Through its MedTech division and the legacy of Ethicon and other specialized units, Johnson & Johnson (J&J) remains a significant player in the broader surgical and endoscopic markets. While their direct focus on duodenoscopes is less than that of Olympus, their influence in surgical accessories, sealants, and training is substantial. J&J leverages its immense corporate resources to support large-scale clinical trials and hospital-wide procurement contracts. Their focus on digital surgery and robotic integration is expected to have a long-term impact on the ERCP market, as they explore ways to automate and standardize complex endoscopic maneuvers.

Medtronic: Medtronic is a global leader in medical technology, with a significant presence in the gastrointestinal health sector. Their ERCP-related products include a variety of diagnostic and therapeutic accessories. Medtronic has been active in the development of AI-based diagnostic tools for endoscopy, aiming to assist clinicians in the early detection of malignancies. The company’s global distribution network and expertise in regulatory affairs allow it to effectively navigate the complex global markets for medical devices. Their strategy involves a combination of organic innovation and strategic acquisitions to broaden their endoscopic and surgical portfolios.

Cook Medical: Cook Medical is a privately held company known for its pioneering work in minimally invasive medical devices. In the ERCP market, Cook is a leading provider of high-quality accessories, including guidewires, catheters, and stents. The company is recognized for its commitment to 'patient-first' engineering, often developing niche products for specific clinical challenges that other larger firms might overlook. Cook Medical has a strong reputation for ethical business practices and maintains a close relationship with the clinical community, frequently collaborating with physicians to refine their product designs. Their products are valued for their reliability and precision in difficult ductal navigations.

B. Braun Melsungen: B. Braun is a major global healthcare company providing a

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wide range of surgical and medical products. In the endoscopy space, they offer various accessories and surgical tools that complement the ERCP procedure. B. Braun focuses on providing integrated solutions for the hospital environment, including infusion therapy and pain management products that are often used in conjunction with endoscopic interventions. Their long history of manufacturing excellence and their extensive global footprint make them a stable and reliable partner for healthcare providers looking for a broad range of surgical consumables.

Hobbs Medical: Hobbs Medical is a specialized manufacturer of endoscopic accessories, focusing on high-quality, cost-effective solutions for gastroenterologists. Their product line includes a variety of brushes, catheters, and biopsy forceps used in ERCP procedures. Hobbs Medical prides itself on its agility and its ability to respond quickly to the needs of its customers. Their products are often found in both large hospitals and smaller specialized clinics, where they provide a reliable alternative to the more expensive offerings of the major conglomerates. Their commitment to American manufacturing and quality control has helped them maintain a loyal customer base.

STERIS: STERIS is a global leader in infection prevention and sterilization, making them a critical partner in the ERCP market. While they do not manufacture endoscopes themselves, their automated endoscope reprocessors (AERs) and specialized cleaning chemistries are essential for the safe use of reusable duodenoscopes. STERIS has been at the forefront of developing protocols and technologies to combat the rise of multidrug-resistant organisms in endoscopy units. Their services also include technical support and facility design, helping hospitals optimize their sterilization workflows. As regulatory pressure on scope cleaning intensifies, STERIS’s role in the value chain continues to grow in importance.

Merit Medical Systems: Merit Medical provides a variety of interventional and diagnostic products used in a wide range of medical procedures, including ERCP. Their portfolio includes inflation devices, guidewires, and drainage catheters. Merit Medical is known for its focus on clinician-led innovation and its ability to bring high-quality, practical tools to market. The company has a strong global presence and has been active in expanding its gastroenterology division through targeted product launches. Their reputation for reliable manufacturing and effective sales support makes them a key supplier for interventional suites worldwide.

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TeleMed Systems: TeleMed Systems specializes in the development and manufacture of endoscopic accessories, with a strong emphasis on the ERCP and GI markets. Their product offerings include specialized stents, catheters, and drainage systems. TeleMed is recognized for its innovation in stent design, focusing on features that prevent migration and improve long-term patency. The company's technical expertise in polymer and nitinol materials allows them to create products that address the specific anatomical challenges of the pancreaticobiliary system. Their focus on specialized niches makes them a valuable player in the high-end therapeutic segment of the market.

Changzhou Health Microport Medical Device: Based in China, this company has become a major regional and international player in the medical device sector. They produce a wide range of endoscopic accessories, including stents and biopsy tools, often at a highly competitive price point. Health Microport has benefited from the rapid growth of the Chinese healthcare market and has successfully exported its products to many international markets. Their ability to achieve high-volume production while maintaining international quality standards has made them a significant competitor to established Western brands.

Medi-Globe: Medi-Globe is a European-based group specializing in innovative products for minimally invasive surgery and endoscopy. Their gastroenterology division provides a comprehensive range of ERCP accessories, including stone extraction baskets and specialized catheters. Medi-Globe focuses on providing high-quality, precision-engineered tools that enhance the efficiency of endoscopic procedures. Their strong presence in the European market is supported by a reputation for reliability and a focus on clinician training. The company continues to expand its international reach, targeting high-growth markets in Asia and South America.

Taewoong Medical: Taewoong Medical, based in South Korea, is a world-renowned leader in the field of metallic stents. Their 'Niti-S' line of stents is widely used in ERCP procedures for the management of both benign and malignant biliary strictures. Taewoong is known for its innovative stent designs, including specialized coatings and unique weave patterns that offer superior flexibility and radial strength. Their focus on the high-end interventional segment has made them a preferred partner for endoscopists dealing with complex ductal anatomy. Taewoong's commitment to clinical research and international collaboration has established them as a key trendsetter in stent technology.

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Market Opportunities

Rotatable Scope Technology: The FDA clearance of the 360-degree rotatable scope by Dragonfly Endoscopy represents a major opportunity. These systems allow endoscopists to orient their instruments more precisely within the complex anatomy of the biliary and pancreatic ducts, potentially reducing procedure times and increasing the success rates of difficult cannulations. Manufacturers that can integrate rotatability into their standard scope lines will have a significant competitive edge.

Expansion of Disposable Scopes: The shift toward single-use duodenoscopes continues to gain momentum, driven by patient safety concerns and the high cost of manual reprocessing. There is a significant opportunity for companies like Ambu and the major traditional players to develop more cost-effective, high-performance disposable scopes that match the optical and mechanical quality of reusable versions.

AI-Enhanced Diagnostics: The integration of Artificial Intelligence (AI) into endoscopy processors for real-time image analysis is a burgeoning field. AI can help in the identification of early-stage tumors and in the precise measurement of ductal strictures. Developing and marketing AI software that can be integrated with existing hardware represents a high-margin opportunity for capital equipment manufacturers.

Emerging Markets and Physician Training: As seen with the medical mission to Ghana, there is a massive opportunity to expand ERCP services in developing nations. Companies that invest in physician training and provide affordable, durable equipment tailored to the needs of hospitals in these regions can establish long-term market leadership in previously untapped geographies.

Market Challenges

Procedure Complexity and Risk: ERCP remains one of the most technically demanding endoscopic procedures, with a significant risk of complications such as post-ERCP pancreatitis. This complexity limits the number of qualified practitioners and can act as a bottleneck for market growth. Ongoing efforts to

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simplify the procedure through better instrumentation are essential but take time to gain widespread clinical adoption.

High Capital and Operational Costs: The high cost of duodenoscopes, high-definition processors, and specialized fluoroscopy systems can be a barrier for smaller hospitals and ASCs. Additionally, the recurring costs of accessories and the maintenance required for reprocessing systems put a strain on healthcare budgets.

Stringent Infection Control Mandates: Regulatory bodies are increasingly focused on the safety of reusable endoscopes. Meeting the evolving requirements for reprocessing, which may include frequent microbiological testing and the transition to sterilized or disposable components, increases the operational burden and costs for endoscopy units.

Competition from Non-Invasive Diagnostics: Advances in Magnetic Resonance Cholangiopancreatography (MRCP) and endoscopic ultrasound (EUS) have reduced the need for purely diagnostic ERCP. While ERCP remains the gold standard for therapeutic interventions, the diagnostic segment of the market is under constant pressure from these less invasive and lower-risk alternatives. Manufacturers must continue to emphasize the therapeutic capabilities of their ERCP systems to maintain their clinical relevance.

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