

Arthroscopy Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Application (Knee Arthroscopy, Hip Arthroscopy, Spine Arthroscopy, Shoulder and Elbow Arthroscopy, Others), By Product (Arthroscope, Arthroscopic Implant, Fluid Management System, Radiofrequency (RF) System, Visualization System, Others), By End-User (Hospitals & Clinics, Ambulatory care Centers, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Arthroscopy Devices Market has valued at USD 6.01 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.56% through 2028. The Global Arthroscopy Devices Market refers to the market for medical devices used in arthroscopic procedures. Arthroscopy is a minimally invasive surgical technique used to diagnose and treat joint-related conditions, primarily in the knee, shoulder, hip, and other joints. It involves the use of specialized instruments and cameras to visualize and treat joint problems.

Key Market Drivers

Increasing Prevalence of Musculoskeletal Disorders

The Global Arthroscopy Devices Market is witnessing remarkable growth, and one significant driving force behind this expansion is the escalating prevalence of

musculoskeletal disorders. As an aging population, lifestyle factors, and increasing participation in physical activities contribute to the rising incidence of these conditions, arthroscopy emerges as a vital tool in the diagnosis and treatment of joint-related ailments. Musculoskeletal disorders encompass a wide range of conditions affecting the musculoskeletal system, which includes bones, joints, muscles, ligaments, and tendons. These disorders can manifest as osteoarthritis, rheumatoid arthritis, tendinitis, ligament injuries, and other joint-related issues. They often result in pain, reduced mobility, and decreased quality of life for affected individuals. The global population is aging at an unprecedented rate. As individuals grow older, the likelihood of developing degenerative joint diseases like osteoarthritis increases. These conditions often necessitate surgical interventions for pain relief and improved joint function. Sedentary lifestyles, marked by extended periods of sitting and reduced physical activity, contribute to the weakening of muscles and joints. This can accelerate the development of musculoskeletal disorders. Individuals who lead desk-bound lives are more susceptible to joint pain and related ailments. The rising prevalence of obesity worldwide is closely linked to musculoskeletal disorders. Excess weight places additional strain on joints, particularly in the knees, hips, and lower back, increasing the risk of developing conditions such as osteoarthritis. Obese individuals often require surgical solutions, where arthroscopy can provide a minimally invasive option. Arthroscopy is a minimally invasive surgical technique that enables healthcare professionals to visualize, diagnose, and treat joint conditions through small incisions. This approach offers several advantages over traditional open surgery, including reduced post-operative pain, shorter hospital stays, quicker recovery times, and smaller scars. The increasing prevalence of musculoskeletal disorders has fueled the demand for arthroscopic procedures. Surgeons now use arthroscopy devices to perform a wide range of joint-related surgeries, including knee arthroscopy, shoulder arthroscopy, hip arthroscopy, and more. These devices include high-definition cameras, precision instruments, and visualization systems that enhance the accuracy and effectiveness of these procedures.

Sports-Related Injuries

The Global Arthroscopy Devices Market is experiencing robust growth, and a significant catalyst behind this expansion is the increasing incidence of sports-related injuries. As the world becomes more sports-conscious and physically active, the demand for arthroscopy devices has surged. These advanced tools are playing a pivotal role in diagnosing and treating joint injuries efficiently, offering athletes and active individuals a path to a quicker recovery. Participation in sports and physical activities has witnessed an unprecedented surge in recent years. From amateur enthusiasts to professional

athletes, people of all ages are engaging in various sports, from soccer and basketball to tennis and CrossFit. While this heightened activity level is positive for overall health and well-being, it also comes with an elevated risk of sports-related injuries.

Arthroscopy is a minimally invasive surgical technique that has become the go-to choice for diagnosing and treating sports-related joint injuries. It involves the use of small incisions and specialized instruments, including high-definition cameras and precision tools, to visualize and repair damaged joints. Arthroscopy is particularly appealing to athletes and active individuals due to several compelling reasons. As the prevalence of sports-related injuries continues to rise, the demand for arthroscopy devices is soaring. Surgeons now rely on these advanced instruments to perform a wide range of sports injury-related procedures, such as ACL reconstruction, meniscus repair, and rotator cuff surgery. This trend is not limited to professional athletes; it extends to recreational sports enthusiasts who seek quick and effective solutions to resume their active lifestyles.

Minimally Invasive Techniques

The Global Arthroscopy Devices Market is experiencing remarkable growth, and at the heart of this expansion is the adoption of minimally invasive techniques. Arthroscopy, as a minimally invasive surgical approach, has revolutionized the diagnosis and treatment of joint-related conditions. Minimally invasive techniques involve performing surgical procedures through small incisions rather than traditional open surgery. Arthroscopy, in particular, is a shining example of this approach, offering several key advantages that have revolutionized orthopedic medicine. Patients increasingly prefer minimally invasive procedures due to the reduced pain, shorter recovery times, and smaller scars associated with them. This preference has driven the demand for arthroscopy, as it aligns with patients' desires for less invasive treatments. Surgeons have become more skilled in performing arthroscopic procedures, thanks to advancements in training and technology. This has led to greater confidence in the efficacy of minimally invasive techniques. The development of high-definition cameras, precision instruments, and innovative visualization systems has enhanced the capabilities of arthroscopic procedures. Surgeons can now perform complex joint surgeries with remarkable precision, boosting patient outcomes. Minimally invasive techniques often result in shorter hospital stays, less post-operative care, and fewer complications. This can significantly reduce healthcare costs, making these procedures an attractive option for both patients and healthcare systems. Arthroscopy is no longer limited to a few joint procedures. Its applications have expanded to encompass various joints, including the knee, shoulder, hip, and ankle, as well as emerging areas like minimally invasive spine surgery.

Rising Healthcare Expenditure

The Global Arthroscopy Devices Market is on an upward trajectory, and a pivotal factor fueling its expansion is the substantial increase in healthcare expenditure worldwide. As governments, healthcare organizations, and individuals allocate more resources to healthcare services and infrastructure, the demand for advanced medical technologies, including arthroscopy devices, is witnessing significant growth. Increased healthcare spending allows hospitals and healthcare providers to invest in the latest arthroscopy devices and equipment. This ensures that patients have access to cutting-edge technology for their joint-related diagnoses and surgeries. Higher healthcare budgets enable research and development efforts to innovate and improve arthroscopy devices continually. This leads to enhanced surgical precision, better patient outcomes, and an expanded range of applications. Although arthroscopy can be a cost-effective alternative to open surgeries in the long run, the initial investment in advanced arthroscopy devices can be substantial. Rising healthcare expenditure helps cover these upfront costs, making these devices more accessible to healthcare facilities. As healthcare spending grows, so does the global reach of arthroscopy procedures. Emerging markets, in particular, are witnessing an uptick in the adoption of arthroscopy devices, thanks to increased healthcare investments. Greater healthcare spending often translates into improved patient education and awareness campaigns. Patients are more likely to consider arthroscopy as a viable treatment option when they are well-informed about its benefits and advantages.

Key Market Challenges

High Initial Costs

Acquiring advanced arthroscopy equipment and devices involves significant upfront investments for healthcare facilities. The cost of purchasing arthroscopy systems, high-definition cameras, precision instruments, and visualization systems can be substantial. This initial financial barrier can deter smaller healthcare providers from adopting these technologies.

Reimbursement Issues

Reimbursement policies and procedures for arthroscopic surgeries can vary significantly by region and insurer. This can create uncertainty for both patients and healthcare providers regarding the reimbursement they can expect for arthroscopic procedures.

Inconsistent reimbursement practices can hinder the wider adoption of these techniques.

Competing Surgical Techniques

Arthroscopy faces competition from alternative surgical techniques, including traditional open surgery and robotic-assisted surgery. While arthroscopy offers numerous advantages, such as reduced recovery times and smaller incisions, some surgeons and patients may still opt for other methods based on familiarity or perceived benefits.

Device Quality and Maintenance

The quality and maintenance of arthroscopy devices are paramount for patient safety and successful surgeries. Ensuring that equipment remains in optimal working condition can be challenging and costly. Regular maintenance, upgrades, and replacements are necessary to prevent device failures during procedures.

Key Market Trends

Robotics and Artificial Intelligence (AI) Integration

Robotics and AI are finding their way into the field of arthroscopy. Robotic-assisted arthroscopic procedures offer greater precision and control for surgeons, improving patient outcomes. AI-powered software can aid in diagnosing joint conditions and assist surgeons during surgeries by providing real-time data and predictive analytics.

Miniaturization of Devices

Miniaturization is a continuing trend in the arthroscopy devices market. Smaller, more compact devices allow for even less invasive procedures, reducing patient trauma and speeding up recovery times. Miniaturization also facilitates access to difficult-to-reach areas within joints.

3D Visualization and Augmented Reality

The adoption of 3D visualization and augmented reality (AR) is enhancing the accuracy and effectiveness of arthroscopic procedures. Surgeons can view intricate joint structures in three dimensions, improving their ability to diagnose and perform surgeries. AR overlays digital information onto the surgeon's view, aiding in navigation

during complex procedures.

Patient-Centric Care

There is a growing emphasis on patient-centric care, and this trend is extending to arthroscopic procedures. Patients are seeking minimally invasive options that offer quicker recovery times and reduced post-operative pain. The arthroscopy devices market is responding by providing technologies and techniques that prioritize patient comfort and outcomes.

Segmental Insights

Application Insights

Based on the category of Application, the Knee Arthroscopy segment emerged as the dominant player in the global market for arthroscopy devices market in 2022.

Degenerative knee disease is a widespread occurrence among the elderly population worldwide, and its prevalence is on the rise due to the growing number of older individuals globally. For instance, as of February 2021, the World Health Organization reported that approximately 28% of individuals aged 50 and above experience knee pain associated with degenerative knee disease. This type of pain is often debilitating, and in many cases, the only effective solution to alleviate it is through a knee replacement procedure. Arthroscopic knee surgery for degenerative knee disease stands as the most frequently performed orthopedic surgery not only in the United States but also in other developed nations. The global demand for knee arthroscopy is steadily increasing, primarily due to the rising incidence of sports-related injuries, especially those acquired in contact sports.

Osteoarthritis of the knee is a significant contributor to morbidity and disability in the United States. As of September 2021, the Centers for Disease Control and Prevention (CDC) reported that the average lifetime risk of symptomatic knee osteoarthritis for an individual is nearly 50%. Knee arthroscopy has emerged as one of the most commonly employed orthopedic procedures for managing knee osteoarthritis. According to the latest National Health Statistics Report from the CDC, approximately 1,857,000 knee arthroscopies were performed in 2021, with a significant portion of these procedures aimed at addressing pain associated with knee osteoarthritis. Consequently, the increasing occurrences of knee osteoarthritis are driving the demand for arthroscopy devices, thus contributing to the growth of the market.

End-User Insights

Hospitals and clinics are poised to dominate the Global Arthroscopy Devices Market for several compelling reasons. Firstly, these healthcare institutions serve as the primary hubs for diagnosing and treating a wide range of musculoskeletal disorders and joint-related conditions, which are the core areas of arthroscopic procedures. The well-established infrastructure, access to specialized orthopedic surgeons, and state-of-the-art surgical facilities within hospitals and clinics make them ideal settings for performing arthroscopy surgeries. Moreover, these institutions often have the financial resources to invest in advanced arthroscopy equipment, ensuring that they can offer cutting-edge diagnostic and treatment options to their patients. Additionally, the trust and credibility associated with hospitals and clinics play a crucial role in patient decision-making, further cementing their dominance in the arthroscopy devices market.

Regional Insights

North America is poised to take the lead in the Arthroscopy Devices Market. Over the last two decades, there has been a significant upswing in the volume of arthroscopic procedures conducted in the region, with knee and hip arthroscopy experiencing the most substantial growth. According to data gleaned from the Humana Claims database, the number of hip arthroscopies has surged nearly seven-fold from 2009 to 2021, with the highest incidence occurring among individuals aged 35-44. The region continues to witness a rise in hip arthroscopies, accompanied by an escalation in both the complexity and diversity of these procedures. This diversity reflects the advancements in arthroscopy products and the robust research ecosystem dedicated to arthroscopic applications.

The surge in arthroscopy procedures in North America is primarily attributed to the increasing prevalence of chronic diseases and orthopedic conditions, particularly among the region's aging population. For instance, a February 2021 article by the Centers for Disease Control and Prevention revealed that musculoskeletal diseases afflict more than half of all individuals in the United States aged 18 and above, with the majority of cases related to trauma, back pain, and arthritis. These conditions necessitate frequent healthcare visits, contributing to the escalating healthcare burden. With the aging demographic in the United States, musculoskeletal diseases are imposing a growing healthcare burden each year, further fueling the demand for arthroscopy devices and driving market growth.

Furthermore, the region has witnessed a notable surge in the prevalence of sports-

related injuries. For example, basketball-related injuries alone affected over half a million people last year, surpassing injuries from biking and football. Trampoline accidents sent 108,000 individuals to the hospital, while golf accounted for 47,000 injuries in the United States. This surge in sports injuries is directly correlated with the increased incidence of joint disorders, further elevating the demand for arthroscopy devices in the region. Consequently, the burgeoning number of arthroscopic procedures performed in North America aligns with the rising prevalence of musculoskeletal conditions and sports-related injuries, bolstering the growth of the market.

Key Market Players

Arthrex Inc

CONMED Corp

Johnson & Johnson

Karl Storz SE & Co KG

Medtronic PLC

Richard Wolf GmbH

Smith & Nephew PLC

Stryker Corp

Report Scope:

In this report, the Global Arthroscopy Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Arthroscopy Devices Market, By Application:

Knee Arthroscopy

Hip Arthroscopy

Spine Arthroscopy

Shoulder and Elbow Arthroscopy

Others

Arthroscopy Devices Market, By Product:

Arthroscope

Arthroscopic Implant

Fluid Management System

Radiofrequency (RF) System

Visualization System

Others

Arthroscopy Devices Market, By End-User:

Hospitals & Clinics

Ambulatory care Centers

Others

Arthroscopy Devices Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Arthroscopy Devices Market.

Available Customizations:

Global Arthroscopy Devices market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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