

Benign Prostatic Hyperplasia Treatment Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Treatment (Minimal Invasive Surgery, Invasive Surgery), By Procedure (Transurethral Resection of the Prostate, Prostate Laser Surgery, Transurethral Microwave Thermotherapy, Transurethral Needle Ablation of the Prostate, Prostatic Urethral Lift, Water Vapor Therapy, Others), By Product (Resectoscopes, Urology Laser, Radiofrequency Ablation, Electrodes, Catheters, Prostatic Stents, Implants, Others), By End use (Hospitals & Clinics, Research and Manufacturing, others), By Region and Competition

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Abstracts

Global Benign Prostatic Hyperplasia Treatment Devices Market has valued at USD 11.09 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.58% through 2028. Benign Prostatic Hyperplasia (BPH), a common condition affecting aging men, has spurred significant advancements in medical technology. The global market for BPH treatment devices has experienced remarkable growth as innovative solutions continue to emerge. As the population ages and awareness of BPH increases, the demand for effective and minimally invasive treatment options has never been greater. Benign Prostatic Hyperplasia, also known as an enlarged prostate, is a non-cancerous growth of the prostate gland, which can lead to urinary problems in men. The condition is often associated with aging and is

characterized by symptoms such as increased urinary frequency, urgency, weak urine stream, and incomplete bladder emptying. It can significantly impact the quality of life, making effective treatment options essential.

As the global population ages, the prevalence of BPH increases. With a rising number of elderly men, the demand for BPH treatment devices is on the rise, driving market growth. Patients and healthcare providers increasingly prefer minimally invasive treatment options due to their reduced recovery times and fewer complications. Innovations in BPH treatment devices have capitalized on this trend. Recent advancements in medical technology have led to the development of more effective and precise BPH treatment devices, improving patient outcomes. Greater awareness about BPH and its treatment options has led more individuals to seek medical intervention, further propelling market growth.

The global market for Benign Prostatic Hyperplasia treatment devices is poised for substantial growth in the coming years. As the aging population continues to expand, technological innovations and growing awareness further bolster the demand for minimally invasive and effective BPH treatment options. Manufacturers, healthcare providers, and regulatory bodies need to work together to ensure that these technologies are accessible, safe, and efficient for patients worldwide. As we progress into an era of personalized medicine, the BPH treatment market is likely to witness more exciting advancements, improving the quality of life for those affected by this common condition.

Key Market Drivers

Increasing Aging Population is Driving the Global Benign Prostatic Hyperplasia Treatment Devices Market

The global healthcare landscape is undergoing a significant transformation as the world's population ages. One notable consequence of this demographic shift is the increasing prevalence of age-related health conditions, such as Benign Prostatic Hyperplasia (BPH). BPH, a non-cancerous enlargement of the prostate gland, affects a substantial portion of older men and can lead to bothersome urinary symptoms. As the aging population continues to grow, so does the demand for effective treatments for BPH. This, in turn, is driving the global market for BPH treatment devices. The global population is rapidly aging. According to the World Population Prospects 2019, by the United Nations, the number of people aged 60 and over is expected to more than double by 2050, reaching nearly 2.1 billion. As more people enter their senior years, the

prevalence of age-related health conditions, including BPH, is expected to rise. Demographic shifts, including longer life expectancies and declining birth rates, are causing this transformation. In countries like Japan, Germany, and the United States, the aging population is already a significant demographic group. This demographic trend is creating a higher demand for healthcare services and treatments, including those for conditions like BPH.

The increasing prevalence of BPH due to the aging population is a major driver for the global BPH treatment devices market. As more men experience the symptoms of BPH, the demand for effective treatment options continues to rise. BPH treatment devices offer a range of options, from minimally invasive procedures to surgical interventions, depending on the severity of the condition and the patient's preferences. Devices like transurethral microwave thermotherapy (TUMT), transurethral needle ablation (TUNA), and prostatic urethral lift (PUL) are becoming increasingly popular for treating BPH. These procedures are less invasive than traditional surgical methods and offer quicker recovery times. For patients with severe BPH, traditional surgical options such as transurethral resection of the prostate (TURP) and laser therapy remain viable treatment choices. These surgical devices are continuously evolving to be more effective and less invasive.

Rising Healthcare Expenditure in R&D is Driving the Global Benign Prostatic Hyperplasia Treatment Devices Market

The surge in healthcare expenditure is a crucial factor driving the growth of the BPH treatment devices market. The following are key ways in which increased healthcare spending is contributing to the expansion of the market. Increased healthcare expenditure allows patients to access advanced and effective BPH treatment options. Patients are more willing to explore these options when they are confident that the healthcare system can support their needs. Greater investment in healthcare enables medical device manufacturers and pharmaceutical companies to invest in research and development to create innovative BPH treatment devices and drugs. This fosters competition and drives product improvement. The growth in healthcare spending often leads to the establishment of more healthcare facilities, including urology clinics and outpatient centers specializing in BPH treatment. This expanded infrastructure enhances patient access to diagnosis and treatment. Increased healthcare expenditure can result in improved insurance coverage for BPH treatments. Patients are more likely to seek treatment when they have insurance support, which further boosts the market.

Key Market Challenges

Regulatory Hurdles

One of the significant challenges in the BPH treatment devices market is navigating complex and varying regulatory landscapes across different regions. Each country has its own set of regulations and approval processes for medical devices. Manufacturers often need to undergo rigorous clinical trials and gain approvals from various regulatory bodies, such as the FDA in the United States and the European Medicines Agency (EMA) in Europe. The process can be time-consuming and expensive, posing obstacles for market entry. To overcome this challenge, companies in the BPH treatment devices market must invest in a thorough understanding of regional regulatory requirements. Collaborating with local experts and streamlining the approval process can help expedite market access.

Limited Awareness

Despite the prevalence of BPH, there is still a lack of awareness regarding the available treatment options. Many patients and healthcare providers are unaware of the various minimally invasive treatment devices that can effectively manage BPH symptoms. This lack of awareness often leads to patients pursuing traditional treatments or delaying necessary interventions. Addressing the issue of limited awareness requires educational campaigns targeting both healthcare professionals and patients. Manufacturers should invest in marketing and educational initiatives to ensure that potential patients and their doctors are well-informed about the available BPH treatment options.

Cost of Treatment

The cost of BPH treatment devices can be a significant barrier to patients seeking effective interventions. In many cases, these devices are not fully covered by health insurance, and the out-of-pocket expenses can be a concern for patients, particularly in countries with limited healthcare coverage. To tackle this challenge, manufacturers must consider pricing strategies that make these devices more accessible to a broader range of patients. This can involve working with healthcare providers and insurers to negotiate reimbursement agreements and exploring cost-effective manufacturing methods to reduce the overall price.

Competition in the Market

The BPH treatment devices market is competitive, with numerous manufacturers offering a wide range of products. This competition can make it challenging for newer companies to establish themselves and gain market share. To stand out in a crowded market, companies must focus on innovation and product differentiation. Developing next-generation devices with improved effectiveness, safety, and patient comfort can be a key strategy. Additionally, forming strategic partnerships or acquisitions can help new entrants establish a presence in the market.

Evolving Technology

The field of medical devices is continuously evolving, with new technologies and treatment methods emerging. Staying at the forefront of these advancements is crucial for BPH treatment device manufacturers. Adopting the latest technology can be both a challenge and an opportunity, as it requires significant research and development efforts. Companies in the BPH treatment devices market should invest in research and development to stay up-to-date with the latest technologies. Collaboration with research institutions and healthcare providers can help identify and adapt to emerging trends.

Key Market Trends

Minimally Invasive Procedures on the Rise

One of the notable trends in the BPH treatment devices market is the growing preference for minimally invasive procedures. Traditionally, open surgery was the primary option for treating BPH. However, advancements in technology have given rise to minimally invasive procedures such as transurethral resection of the prostate (TURP), laser therapy, and transurethral microwave thermotherapy (TUMT). These procedures offer quicker recovery times, reduced hospital stays, and fewer complications, making them more attractive to patients.

Adoption of Laser Therapy

Laser therapy has gained significant traction as an effective treatment for BPH. Laser devices, like the GreenLight laser and Holmium laser, are used to vaporize or remove excess prostate tissue. The appeal of laser therapy lies in its precision and minimal bleeding, making it a suitable option for patients taking blood-thinning medications or those with a higher risk of bleeding complications. The global BPH treatment devices market has seen a surge in the use of lasers, especially among urologists.

Innovative BPH Treatment Devices

Advancements in technology have led to the development of innovative BPH treatment devices. One such innovation is the UroLift System, which involves the placement of tiny implants to hold the enlarged prostate tissue out of the way. This procedure provides relief from BPH symptoms while preserving sexual function. Similarly, the Rez?m Water Vapor Therapy utilizes water vapor to treat BPH by shrinking the prostate tissue. These innovative approaches are contributing to the diversification of treatment options in the global market.

Increased Use of Robotic-Assisted Surgery

Robotic-assisted surgery, often associated with the da Vinci Surgical System, has been increasingly utilized in the treatment of BPH. This technology provides surgeons with enhanced precision and dexterity, resulting in reduced blood loss, shorter hospital stays, and quicker recovery times. Robotic-assisted procedures are becoming more accessible and are likely to become a standard in BPH treatment, especially in technologically advanced regions.

Growing Patient Awareness and Education

With the internet and social media at their fingertips, patients are becoming more informed about their healthcare options. This has led to increased patient awareness and education regarding BPH treatment devices. Patients are more likely to seek out non-invasive or minimally invasive procedures, and they often play an active role in selecting the best treatment option for themselves.

Expanding Geriatric Population

The global population is aging, and with that, the prevalence of BPH is expected to increase. This demographic shift is driving the demand for BPH treatment devices, creating a growing market for manufacturers. As a result, the market is likely to see a consistent upward trend in the coming years.

Advancements in Imaging and Diagnostics

Improvements in diagnostic tools, such as magnetic resonance imaging (MRI) and ultrasound, have enhanced the ability to accurately diagnose and evaluate the extent of BPH. This, in turn, enables more targeted and personalized treatment plans. As imaging

technology continues to evolve, it will likely have a significant impact on BPH treatment device selection and surgical planning.

Segmental Insights

Treatment Insights

Based on the category of treatment, Minimal Invasive Surgery emerged as the dominant player in the global market for Benign Prostatic Hyperplasia Treatment Devices in 2022. Minimal Invasive Surgery (MIS) techniques have revolutionized the treatment of BPH, offering more effective and less invasive solutions for patients. Transurethral Resection of the Prostate (TURP) is a widely adopted surgical procedure that removes obstructive prostate tissue using a resectoscope inserted through the urethra. It has proven effective in relieving BPH symptoms. GreenLight Laser Therapy technique uses a laser to vaporize prostate tissue, providing quick relief from BPH symptoms. It has gained popularity due to its precision and minimal side effects.

The UroLift system involves the placement of small implants that lift and hold the enlarged prostate tissue out of the way, effectively opening the urethra. This procedure offers rapid symptom improvement and preserves sexual function.

The surge in popularity of MIS in BPH treatment has had a significant impact on the global BPH treatment devices market. The market for devices used in MIS procedures, such as laser systems, resectoscopes, and implant systems, has grown substantially. Manufacturers have responded by developing innovative devices, enhancing precision, and improving patient outcomes. Furthermore, as patient awareness of these advanced treatment options increases, more individuals are opting for MIS procedures. This shift has fueled market growth, as patients seek the benefits of less invasive, more effective treatments.

Procedure Insights

The Transurethral Resection of the Prostate segment is projected to experience rapid growth during the forecast period. Transurethral Resection of the Prostate is a highly effective procedure for treating BPH, particularly in patients with moderate to severe symptoms or those experiencing complications like urinary retention. During Transurethral Resection of the Prostate, a surgeon trims away excess prostate tissue, relieving the pressure on the urethra and improving urine flow. The success rate of Transurethral Resection of the Prostate in relieving BPH symptoms is impressively high,

making it a preferred choice among physicians and patients. Transurethral Resection of the Prostate is considered a minimally invasive procedure, which means it involves smaller incisions, shorter hospital stays, and quicker recovery times compared to traditional open surgeries. This characteristic is highly appealing to patients who prefer shorter recovery periods and reduced post-operative discomfort. Transurethral Resection of the Prostate offers long-term symptom relief, making it a durable solution for BPH. This has led to increased patient satisfaction, reducing the need for additional treatments in the future.

Regional Insights

North America emerged as the dominant player in the global Benign Prostatic Hyperplasia Treatment Devices market in 2022, holding the largest market share in terms of value. North America has been at the forefront of technological innovations in the medical field. The region boasts a thriving medical device industry, with companies consistently developing cutting-edge BPH treatment devices. These devices often utilize minimally invasive techniques, reducing recovery times and improving patient outcomes. North America, particularly the United States, has one of the highest healthcare spending rates globally. This increased investment in healthcare infrastructure and research and development has contributed to the development and adoption of advanced BPH treatment devices. The aging population in North America is a significant driver of the BPH treatment devices market. As men age, the risk of developing BPH increases, leading to a higher demand for effective treatment options. This demographic shift has led to increased research and development efforts to cater to the growing patient pool.

Key Market Players

Boston Scientific Corporation

Olympus America

Endo Pharmaceuticals Inc.

biolitec AG

Medifocus Inc.

Cook Medical

Teleflex Incorporated

Urotronic

Coloplast Corp

Richard Wolf GmbH

PROCEPT BioRobotics Corporation

Report Scope:

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

Benign Prostatic Hyperplasia Treatment Devices Market, By Treatment:

Minimal Invasive Surgery

Invasive Surgery

Benign Prostatic Hyperplasia Treatment Devices Market, By Procedure:

Transurethral Resection of the Prostate

Prostate Laser Surgery

Transurethral Microwave Thermotherapy

Transurethral Needle Ablation of the Prostate

Prostatic Urethral Lift

Water Vapor Therapy

Others

Benign Prostatic Hyperplasia Treatment Devices Market, By Product:

Resectoscopes

Urology Laser

Radiofrequency Ablation

Electrodes

Catheters

Prostatic Stents

Implants

Others

Benign Prostatic Hyperplasia Treatment Devices Market, By End use:

Hospitals & Clinics

Research and Manufacturing

Others

Benign Prostatic Hyperplasia Treatment Devices Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Benign Prostatic Hyperplasia Treatment Devices Market - Global Industry Size, Share, Trends, Opportunity, and...

Company Profiles: Detailed analysis of the major companies present in the Benign Prostatic Hyperplasia Treatment Devices Market.

Available Customizations:

Global Benign Prostatic Hyperplasia Treatment 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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