

# **India HPB Surgical Devices Market By Product (Endoscope, Electrosurgery, Hand Instruments, Access Instrument, Surgical Stapling Devices, Energy/Vessel Sealing Devices, Fluid Management System, Robotic Surgical System, Stents, Accessories), By Indication (Liver Cancer, Pancreatic Cancer, Gallstones, Bile Duct cancer, Pancreatitis, Others), By End User (Hospitals & Clinics, Ambulatory Surgery Centres, Others), By Region and Competition, Forecast & Opportunities, 2020-2030F**

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## **Abstracts**

India HPB Surgical Devices Market was valued at USD 5,550.21 Million in 2024 and is expected to reach USD 7,429.68 Million by 2030 with a CAGR of 5.18% during the forecast period. HPB Surgical Devices are highly specialized medical equipment specifically designed for hepatopancreatobiliary (HPB) surgeries. These surgeries involve the diagnosis and treatment of various diseases that affect the liver, pancreas, and biliary system. The range of devices used in HPB surgeries is comprehensive, spanning from basic surgical tools to state-of-the-art equipment such as laparoscopes, endoscopes, and ultrasonic surgical devices. These advanced devices enable surgeons to perform minimally invasive procedures with utmost precision, thereby reducing surgical risks and enhancing patient outcomes in HPB surgeries. By leveraging the latest technological advancements, HPB Surgical Devices play a pivotal role in ensuring optimal surgical outcomes, improving patient recovery, and advancing the field of HPB surgery as a whole.

## Key Market Drivers

### Growing Number of Patients Suffering from Gall Bladder Stone Disease

The rising prevalence of gall bladder stone disease has ushered in a significant increase in the demand for Hepatopancreatobiliary (HPB) surgeries and surgical devices. This surge in patients suffering from gall bladder stones has led to a substantial impact on the healthcare industry and surgical technology. Gall bladder stone disease, characterized by the formation of solid deposits within the gall bladder, affects millions of individuals worldwide. Factors such as poor dietary choices, obesity, and genetics contribute to its growing prevalence. As more people are diagnosed with this condition, the need for surgical intervention becomes evident. HPB surgeries, including cholecystectomy (removal of the gall bladder), are often the recommended course of action to alleviate the pain and complications associated with gall bladder stones.

The prevalence of gallbladder stones is notably higher in certain regions compared to others, influenced by factors such as dietary habits and local endemics that may contribute to the formation of gallstones. In India, approximately 4% of the population is affected by cholelithiasis, whereas the prevalence in Western countries is around 10%.

This escalating demand for HPB surgeries has fueled innovation in surgical devices and techniques. Minimally invasive procedures, such as laparoscopic cholecystectomy, have gained popularity due to their shorter recovery times and reduced post-operative pain. Consequently, surgical device manufacturers have developed advanced instruments like laparoscopic cameras, dissectors, and staplers, enabling surgeons to perform these procedures with precision and efficiency. Moreover, the increasing number of patients has prompted investment in research and development to enhance the safety and effectiveness of HPB surgeries. Surgeons now have access to state-of-the-art robotic-assisted systems, which offer enhanced dexterity and visualization, further improving patient outcomes.

The growing number of patients suffering from gall bladder stone disease has had a profound impact on the field of HPB surgeries and surgical devices. This surge has not only increased the demand for these surgeries but has also catalyzed innovation, resulting in more advanced and less invasive procedures, ultimately benefiting patients by improving their overall healthcare experience. As technology continues to advance, we can expect further improvements in the field of HPB surgeries, providing patients with better treatment options and outcomes.

## Growing Popularity of Minimal Invasive Surgery

The growing popularity of minimally invasive surgery (MIS) is significantly impacting the field of Hepatopancreatobiliary (HPB) surgeries and the development of surgical devices. MIS techniques, which include laparoscopic and robotic-assisted procedures, are increasingly preferred by both patients and surgeons due to their numerous advantages. Compared to traditional open surgery, MIS procedures involve smaller incisions, resulting in less pain, shorter hospital stays, and quicker recovery times. Patients are drawn to these benefits, leading to a higher demand for MIS in treating HPB conditions, such as liver and pancreatic disorders. This increasing demand for MIS has led to significant advancements in surgical devices. Laparoscopic instruments, including high-definition cameras, precision graspers, and energy devices like harmonic scalpels, have been refined to enhance a surgeon's ability to perform delicate HPB procedures with precision and efficiency. Additionally, robotic-assisted systems have become increasingly sophisticated, offering improved dexterity and three-dimensional visualization, which is particularly valuable in complex HPB surgeries.

The growth in MIS for HPB surgeries has also driven research and development in the field of minimally invasive techniques. Surgeons are continually refining their skills and exploring new applications for MIS in the treatment of HPB disorders. As a result, innovative technologies and surgical devices are being introduced to further optimize these procedures, making them safer and more accessible to a wider range of patients. The rising popularity of minimally invasive surgery has had a profound impact on the landscape of HPB surgeries and surgical devices. Patients are increasingly seeking out MIS for its benefits, prompting ongoing innovation in surgical instruments and techniques. As the field continues to evolve, we can anticipate even more refined and effective MIS approaches for HPB surgeries, ultimately improving patient outcomes and experiences.

## Increasing Healthcare Expenditure

The escalating healthcare expenditure worldwide has contributed significantly to the growth of Hepatopancreatobiliary (HPB) surgeries and the development of advanced surgical devices. This phenomenon is a reflection of the increasing demand for high-quality healthcare services and the constant quest for better treatment options. As people age, they are more prone to HPB disorders, such as liver and pancreatic diseases, which often require surgical interventions. The rising number of elderly patients seeking treatment has led to an increased demand for HPB surgeries. This

surge in demand has necessitated investment in cutting-edge surgical technologies and devices to meet the needs of an aging population.

Moreover, healthcare expenditure has paved the way for research and innovation in the field of HPB surgeries. This has resulted in the development of minimally invasive techniques and the refinement of surgical devices. Minimally invasive procedures, such as laparoscopic and robotic-assisted surgeries, have gained prominence due to their reduced post-operative complications, shorter hospital stays, and faster recovery times. Consequently, surgical device manufacturers have focused on producing more advanced instruments to support these techniques, including high-definition cameras, precision tools, and energy devices, enhancing surgeons' capabilities.

The increasing healthcare expenditure has also accelerated the adoption of state-of-the-art technologies like surgical robotics. Robotic-assisted systems provide surgeons with improved dexterity and three-dimensional visualization, making complex HPB surgeries more accessible and precise.

### Technological Advancements

Technological advancements have ushered in a new era in the field of Hepatopancreatobiliary (HPB) surgeries, leading to a proliferation of sophisticated surgical devices and techniques. These innovations have revolutionized the way HPB surgeries are performed, offering patients better outcomes and surgeons improved precision and efficiency. These methods involve smaller incisions, reduced tissue trauma, and shorter recovery times compared to traditional open surgery. Advanced imaging systems, including high-definition cameras, have been integrated into surgical devices, providing surgeons with enhanced visualization of the surgical field during these minimally invasive procedures.

Robotic-assisted surgery, in particular, has seen substantial growth due to its precision and dexterity. Surgeons can remotely control robotic arms equipped with specialized instruments, allowing for complex and delicate HPB surgeries with unparalleled precision. This technology has spurred the development of innovative surgical devices like robotic arms and instruments with improved ergonomics, which enhance the surgeon's ability to perform intricate tasks.

Furthermore, advancements in diagnostic imaging, such as CT scans and MRI, have enabled more accurate preoperative planning, allowing surgeons to better assess a patient's condition and tailor their approach accordingly. These imaging technologies

have also contributed to the development of image-guided surgery, which enhances the precision and safety of HPB procedures. Innovations in energy devices, hemostatic agents, and tissue sealants have further transformed the landscape of HPB surgeries. These surgical devices promote efficient tissue dissection, minimize bleeding, and accelerate healing, thereby improving patient outcomes.

## Key Market Challenges

### High Adoption Of Refurbished Systems

The high adoption of refurbished systems in hospital settings is contributing to a decrease in the demand for High-Pressure Balloon (HPB) surgeries and their associated surgical devices. Refurbished systems, which include repurposed medical equipment and devices, offer a cost-effective and sustainable alternative for many healthcare institutions, especially in developing regions where budget constraints are a major concern.

As these refurbished systems often come equipped with the latest technology, they can perform various complex tasks that HPB surgeries could handle, but at a fraction of the cost. This cost-effectiveness makes them an attractive option for many hospitals and healthcare facilities, leading to a reduction in the reliance on more traditional surgical techniques such as HPB surgeries.

Moreover, the improving quality, longevity, and reliability of these refurbished systems also add to their increasing popularity. This trend of adopting refurbished systems is, therefore, leading to a decrease in the demand for HPB surgeries and their corresponding surgical devices. Although it presents challenges for manufacturers of original HPB devices, it prompts a wider discussion on affordable yet quality healthcare solutions.

### Lack Of Trained Professionals

The field of Hepato-Pancreato-Biliary (HPB) surgeries is highly specialized and complex, necessitating a unique caliber of skilled professionals to perform these procedures. However, a current lack of trained professionals is resulting in a decrease in the use of surgical devices specific to HPB surgeries. The intricacy of these procedures requires not only a high level of surgical skill, but also a deep understanding of the diseases and conditions that affect the liver, pancreas, and biliary systems. Without an adequate pool of trained professionals, this niche field faces significant

challenges. The utilization of specialized surgical devices is directly proportional to the number of professionals capable of handling them, thus the decline.

In addition, the training for HPB surgeries is rigorous and lengthy, which may deter some medical professionals. As a result, the healthcare industry is experiencing a shortage in this specific domain. This situation is further exacerbated by the increasing demand for HPB surgeries due to the rise in associated diseases. Hence, the scarcity of skilled professionals is a pressing issue that not only impacts the usage of HPB surgical devices but also hampers the overall progress in this field. To counter this, steps must be taken to incentivize and simplify the training process, thereby increasing the number of competent professionals in the field of HPB surgeries.

## Key Market Trends

### Rise In the Incidence Of Urological Surgery Conditions

The rising incidence of urological surgical conditions has a notable impact on the field of Hepatopancreatobiliary (HPB) surgeries and the development of surgical devices. While urological issues primarily affect the urinary system, the intricate anatomy of the abdominal region means that urological problems can often coincide with HPB disorders, necessitating complex surgical interventions. One significant factor contributing to the increase in HPB surgeries is the association between urological and HPB conditions. For instance, patients with advanced kidney cancer may require extensive surgeries that involve the removal of adjacent organs like the liver or pancreas. Such complex procedures highlight the need for specialized HPB surgeons, and the use of advanced surgical devices tailored to these intricate surgeries.

Urology is one of the most sought-after specialty fields among young doctors in India. Currently, the country boasts approximately 5,600 board-certified urologists. As a technology-driven specialty, urology clinics across both private and public sectors are typically well-equipped to perform endoscopic and laparoscopic procedures, with access to a variety of lasers, including holmium, thulium, and green light lasers. Larger medical centers in metropolitan areas are also equipped with surgical robots, with some hospitals even operating multiple units. As India continues to rapidly develop, increasing levels of education and health awareness are driving higher demand for urological services.

Additionally, the growing prevalence of conditions like kidney stones and renal cysts, which may require surgical intervention, has led to a higher demand for urological



surgeries. These urological procedures often involve HPB specialists, as they may need to address complications or lesions in the liver or pancreas during surgery. The increasing number of urological surgeries that overlap with HPB disorders has spurred innovation in surgical devices and techniques. Surgeons require precision instruments, advanced imaging technologies, and minimally invasive approaches to perform these intricate procedures effectively. As a result, surgical device manufacturers have developed specialized tools to facilitate the simultaneous management of urological and HPB conditions, enhancing patient outcomes and safety.

### Rising Ageing Population

The rapidly aging population worldwide has had a profound impact on the prevalence of Hepatopancreatobiliary (HPB) disorders and the demand for HPB surgeries and surgical devices. As individuals age, they become more susceptible to various HPB conditions, such as liver disease, gallstones, and pancreatic disorders, which often require surgical intervention. This demographic shift has several implications for the healthcare industry. The aging population is a significant driver behind the increasing demand for HPB surgeries. Conditions like hepatocellular carcinoma, which is more common in older adults, often necessitate surgical procedures such as liver resection or transplantation. Similarly, elderly individuals are at a higher risk of developing gallstones, leading to an increased need for gallbladder removal surgeries (cholecystectomy).

The aging population often presents with complex medical histories and multiple comorbidities, making HPB surgeries more challenging. This necessitates the use of advanced surgical devices and techniques to ensure the safety and success of procedures. Surgical instruments, such as precision dissectors and energy devices, have evolved to cater to these complex cases, enabling surgeons to perform HPB surgeries with greater precision and efficiency. Moreover, the elderly population's preference for minimally invasive surgery has driven innovation in surgical technology. Laparoscopic and robotic-assisted procedures, which offer quicker recovery times and reduced post-operative complications, have become increasingly important in HPB surgeries for elderly patients.

### Segmental Insights

#### Indication Insights

Based on Indication, Pancreatic Cancer is projected to dominate the India HPB Surgical

Devices Market during the forecast period. The alarming high incidence rate of pancreatic cancer in India has created an urgent need for innovative surgical devices that can significantly enhance patient outcomes. The development and adoption of these advanced surgical devices will not only revolutionize the treatment options for pancreatic cancer patients but also contribute to the overall growth of the healthcare sector in India.

In order to effectively address the evolving needs of patients and cater to the growing demand for advanced medical technologies, healthcare professionals and stakeholders must remain vigilant in monitoring market trends and continuously analyzing healthcare data. By doing so, they can stay ahead of the ever-evolving dynamics of the sector and ensure that the necessary measures are taken to provide the best possible care to pancreatic cancer patients in India. Together, through innovation and collaboration, we can strive to improve the prognosis and quality of life for those affected by this devastating disease.

### End User Insights

Based on End User, Hospitals & Clinics have emerged as the fastest growing segment in the India HPB Surgical Devices Market during the forecast period. These healthcare settings are often the primary choice for complex procedures like HPB surgeries due to their comprehensive medical facilities and highly skilled medical professionals. Moreover, hospitals and clinics in India have established specialized departments and dedicated surgical teams that focus solely on HPB surgeries, ensuring the highest level of expertise and patient care. The increasing prevalence of liver, pancreas, and gallbladder diseases in India has led to a surge in HPB surgeries. The rise in lifestyle-related risk factors, such as obesity and unhealthy dietary habits, has contributed to the growing burden of these diseases. As a result, hospitals and clinics are witnessing a substantial increase in the number of HPB surgeries performed, further driving the demand for surgical devices in these healthcare settings.

### Regional Insights

Based on Region, North India have emerged as the dominating region in India HPB Surgical Devices Market during the forecast period. The northern region, comprising states such as Delhi, Punjab, and Haryana, currently dominates the Hepato-Pancreato-Biliary (HPB) surgical devices market in India. This dominance can be largely attributed to the robust medical infrastructure, which includes state-of-the-art hospitals and specialized HPB centers. Furthermore, the high concentration of skilled surgeons with



expertise in HPB surgeries in this region has contributed to its leading position.

In addition to the aforementioned factors, the significant patient population in the northern region plays a crucial role in its dominance. The region is home to a large number of people requiring HPB surgeries, which has created a demand for advanced surgical devices and technologies. Other regions in India, such as the western and southern regions, are steadily growing in terms of their medical infrastructure and expertise in HPB surgeries. These regions have also witnessed an increase in patient population seeking HPB treatments. As a result, they may pose a potential challenge to the current dominance of the northern region in the future.

### Key Market Players

Abbott India Ltd.

Johnson & Johnson Pvt Ltd

B. Braun Medical (India) Pvt. Ltd.

Boston Scientific India Private Limited

Cardinal Health International India Pvt Ltd

Conmed Devices Pvt Ltd.

Cook India Medical Devices Pvt. Ltd

ORIGIO India Pvt Ltd

Medtronic India Pvt. Ltd.

Stryker India Private Ltd

### Report Scope:

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

*India HPB Surgical Devices Market By Product (Endoscope, Electrosurgery, Hand Instruments, Access Instrument,...*

### India HPB Surgical Devices Market, By Product:

- o Endoscope
- o Electrosurgery
- o Hand Instruments
- o Access Instrument
- o Surgical Stapling Devices
- o Energy/Vessel Sealing Devices
- o Fluid Management System
- o Robotic Surgical System
- o Stents
- o Accessories

### India HPB Surgical Devices Market, By Indication:

- o Liver Cancer
- o Pancreatic Cancer
- o Gallstones
- o Bile Duct Cancer
- o Pancreatitis
- o Others

### India HPB Surgical Devices Market, By End User:

*India HPB Surgical Devices Market By Product (Endoscope, Electrosurgery, Hand Instruments, Access Instrument,...*

- o Hospitals & Clinics
- o Ambulatory Surgery Centres
- o Others

#### India HPB Surgical Devices Market, By Region:

- o North India
- o South India
- o West India
- o East India

#### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India HPB Surgical Devices Market.

#### Available Customizations:

India HPB Surgical Devices Market report with the given market data, TechSci 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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