

India Minimally Invasive Surgical Devices Market Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Type (Handheld Instruments, Surgical Scopes, Cutting Instruments, Guiding Devices, Electrosurgical Devices, Others), By Surgery Type (Gastrointestinal, Gynecology, Urology, Cardiovascular, Others), By End User (Hospitals & Specialty Clinics, Ambulatory Surgical Centers, Others), by region, and Competition

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Abstracts

India Minimally Invasive Surgical Devices Market has valued at USD 704.17 million in 2023 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 5.59% through 2029. Minimally Invasive Surgical (MIS) Devices are medical instruments and equipment designed for performing surgical procedures with minimal disruption to the patient's body. These devices enable surgeons to access and treat internal organs and structures through small incisions or natural body openings, rather than through large, open surgical procedures. The primary advantages of MIS Devices include reduced post-operative pain, shorter recovery times, fewer complications, and less scarring. Patients often experience improved outcomes and a quicker return to their normal activities compared to traditional open surgery. Minimally Invasive Surgical Devices are used in various medical specialties, including general surgery, gynecology, urology, orthopedics, cardiology, gastroenterology, and more. These devices have revolutionized the field of surgery by offering less invasive alternatives, leading to improved patient comfort and faster healing.

India, like many other countries, has an aging population. The elderly population is more

prone to various medical conditions that require surgical interventions. Minimally invasive surgery is well-suited for older patients as it reduces the physical stress of traditional open surgery. Ongoing advancements in medical technology have led to the development of more sophisticated and precise MIS devices. The integration of robotics, advanced imaging, and better instruments has expanded the range of procedures that can be performed using MIS techniques. Rising healthcare spending, both by individuals and the government, is contributing to the growth of the MIS market. Improved economic conditions have made advanced surgical options more accessible to patients. Greater awareness about the benefits of MIS procedures, both among patients and healthcare professionals, is driving the adoption of these techniques. The use of MIS in orthopedic surgeries, such as joint replacements and spine surgery, is on the rise, driven by the aging population and advancements in surgical techniques.

Key Market Drivers

Technological Advancements

Robotic surgical systems, such as the da Vinci Surgical System, have gained popularity in various surgical specialties. These systems offer high precision and dexterity to surgeons, allowing for complex and delicate procedures to be performed with greater accuracy. Surgeons control robotic arms to make precise incisions and maneuvers, reducing the margin of error. High-definition (HD) and three-dimensional (3D) imaging technologies have improved visualization during MIS procedures. Surgeons can now see the surgical site in greater detail, leading to more accurate diagnoses and precise surgeries. This is particularly beneficial in fields like laparoscopy and endoscopy. Miniaturization of surgical instruments has allowed for smaller incisions and reduced tissue trauma. Instruments such as mini-laparoscopes and micro-instruments enable surgeons to perform intricate procedures with minimal disruption to surrounding tissues. AI and machine learning are being used to assist surgeons in planning and executing MIS procedures. AI can provide real-time feedback during surgery, help identify anomalies, and improve decision-making. It can also predict outcomes and suggest optimal approaches.

Telesurgery or remote surgery allows surgeons to perform procedures on patients located in different geographic areas. This is particularly valuable for reaching patients in remote or underserved regions and for emergency situations. High-speed internet and telecommunication advancements are crucial for the success of telesurgery. Advanced energy devices, such as electrosurgical instruments, laser devices, and ultrasonic scalpels, enable precise cutting, coagulation, and tissue dissection. These

devices reduce blood loss and improve surgical efficiency. Telemedicine platforms are integrated into MIS devices, allowing for remote consultations and real-time guidance from experts during procedures. This is especially useful in challenging or rare surgeries where specialist input is required. Nanotechnology is being applied to create nanoscale surgical tools and drug delivery systems. These tiny instruments can be used for minimally invasive procedures at the cellular and molecular level.

Advances in endoluminal surgery have enabled procedures to be performed entirely within body cavities, reducing the need for external incisions. Examples include endoscopic resections and transgastric surgery. Improved visualization systems, including high-quality displays and lighting, provide a clearer view of the surgical field. This is particularly beneficial for complex procedures requiring precise movements. Surgical navigation systems, often incorporating augmented reality or virtual reality, help guide surgeons during MIS procedures. These systems enhance accuracy and help with anatomical orientation. The use of biocompatible materials in MIS devices reduces the risk of allergic reactions and complications. Devices like surgical implants and sutures are made with materials that are well-tolerated by the body. This factor will help in the development of the India Minimally Invasive Surgical Devices Market.

Increasing Awareness and Education

Patient awareness campaigns and educational initiatives inform individuals about the benefits of minimally invasive surgery, such as reduced scarring, shorter recovery times, and less post-operative pain. Patients are more likely to seek out MIS procedures when they are aware of less invasive alternatives to traditional open surgery. Informed patients often express a preference for minimally invasive surgery, as they understand the potential advantages in terms of safety, comfort, and a quicker return to normal activities.

As patients actively participate in healthcare decisions, their preference for MIS procedures drives demand. Ongoing education and training programs for healthcare providers, including surgeons and nurses, ensure that they are proficient in performing MIS procedures. Educated healthcare providers are more likely to recommend and perform minimally invasive surgeries, thereby increasing the availability of these procedures. Continuing Medical Education (CME) programs keep healthcare professionals up-to-date with the latest advancements in MIS devices and techniques. Knowledge gained from CME programs encourages the adoption of innovative MIS practices in healthcare facilities. Government and non-governmental organizations may run public health campaigns to raise awareness about specific medical conditions and

the availability of minimally invasive treatment options. These initiatives empower patients to make informed decisions about their healthcare.

Medical associations and professional societies often play a role in educating both healthcare providers and the public about the advantages of MIS procedures. They provide guidelines, resources, and recommendations to promote best practices in minimally invasive surgery. The availability of reliable online information allows patients to research and understand MIS procedures. Online resources help patients locate healthcare providers experienced in MIS and make informed choices. Success stories from patients who have undergone MIS procedures can inspire others to consider these options. Sharing patient testimonials through various channels can encourage individuals to explore minimally invasive surgical solutions. Well-informed healthcare providers can effectively communicate the benefits of MIS to their patients during consultations. This open dialogue aids patients in understanding their options and making informed decisions. Education helps reduce any stigma or apprehension associated with new medical techniques. When patients have accurate information about MIS, they may be more willing to embrace these innovative approaches. This factor will pace up the demand of the India Minimally Invasive Surgical Devices Market.

Increasing Aging Population

As individuals age, they become more susceptible to various health conditions, including cardiovascular diseases, joint disorders, cancer, and gastrointestinal issues. Minimally invasive procedures are often preferred for treating these conditions due to their reduced trauma and quicker recovery times. Aging is a risk factor for chronic diseases such as diabetes, hypertension, and osteoarthritis. These conditions may require surgical interventions, and MIS techniques are well-suited for managing these diseases, given the potential benefits for elderly patients.

Older individuals may have reduced physiological resilience compared to younger patients. Minimally invasive procedures, with their smaller incisions and minimal tissue disruption, place less physical stress on elderly patients, making them a safer option. Older patients often experience higher levels of postoperative pain. Minimally invasive surgeries are associated with reduced postoperative pain, which is especially appealing to older individuals. MIS procedures typically lead to shorter hospital stays and quicker recovery times. This is advantageous for older patients who may want to return to their normal activities as soon as possible. Minimally invasive surgeries are associated with a lower risk of complications such as wound infections and postoperative delirium, which can be more problematic for older patients. For older adults, maintaining functional

independence is a priority. MIS procedures, by minimizing physical trauma and reducing the risk of complications, help older individuals retain their independence and quality of life.

Many older patients express a preference for non-invasive or less invasive treatments. They often seek healthcare options that align with their desire to avoid major surgery and its associated risks. Surgeons and healthcare providers have developed specialized skills in geriatric surgery and are increasingly using MIS techniques to address the unique needs of elderly patients. As the elderly population grows, healthcare systems may face increased economic pressure to provide efficient and cost-effective care. MIS procedures, with their potential for shorter hospital stays and cost savings, align with these economic considerations. Geriatric care specialists are more frequently incorporating MIS options into the care plans of elderly patients, further driving the demand for these procedures among this demographic. This factor will accelerate the demand of the India Minimally Invasive Surgical Devices Market.

Key Market Challenges

Cost and Affordability

The initial investment in MIS devices, such as laparoscopic equipment, robotic surgical systems, and high-definition imaging technology, can be high. Additionally, the ongoing costs of consumables and maintenance add to the financial burden. Surgeons and healthcare professionals require specialized training to perform MIS procedures. These training programs can be costly and time-consuming. Minimally invasive procedures, while often cost-effective in the long term, may initially have higher procedural costs due to the need for specialized equipment and skilled personnel. Building and maintaining healthcare facilities equipped with state-of-the-art MIS technology requires significant financial resources. These costs can impact the affordability of MIS procedures. In the absence of comprehensive insurance coverage, patients may face substantial out-of-pocket expenses for MIS procedures, deterring them from seeking these advanced treatments. Insurance coverage for MIS procedures may be limited or may not cover specific minimally invasive techniques. This places a financial burden on patients and affects the affordability of these treatments.

Infrastructure and Accessibility

The availability of advanced healthcare facilities and MIS devices is often concentrated in urban and metropolitan areas. Rural and underserved regions may lack access to

these technologies, making it challenging for residents in these areas to benefit from minimally invasive procedures. Many healthcare facilities, especially in rural areas, may lack the infrastructure and equipment required for performing MIS procedures. This includes the absence of advanced imaging technology and surgical equipment. Establishing a healthcare facility equipped with state-of-the-art MIS devices requires a significant financial investment. Smaller healthcare providers, particularly those in less affluent regions, may struggle to make this investment. MIS procedures require a skilled workforce, including surgeons, nurses, and technicians trained in using advanced surgical devices. A shortage of such professionals can hinder the adoption of MIS techniques. Patients from remote or underserved areas may face challenges related to transportation and logistics when seeking MIS procedures in urban centers. These issues can include long travel times, accommodation costs, and difficulties in accessing follow-up care. MIS procedures, while often cost-effective in the long term, may have higher initial procedural costs. Patients in regions with lower income levels may find these costs prohibitive, affecting accessibility.

Key Market Trends

Consumer Demand for Cosmetic Procedures

There is a growing awareness and consciousness regarding aesthetics and personal appearance in India. People are increasingly seeking minimally invasive cosmetic procedures to enhance their looks and address age-related concerns. Technological advancements have made minimally invasive cosmetic procedures more accessible and effective. These advancements include laser therapy, dermal fillers, and botulinum toxin injections for wrinkle reduction, skin rejuvenation, and body contouring. Minimally invasive cosmetic procedures offer shorter recovery times and reduced downtime compared to traditional surgical interventions. This appeals to individuals who want to resume their daily activities quickly. Many minimally invasive procedures leave minimal scarring, making them more attractive to individuals concerned about visible post-surgical marks. Minimally invasive options provide non-surgical alternatives to address cosmetic concerns, reducing the apprehension associated with going under the knife. As the population ages, there is a desire to maintain a youthful appearance. Minimally invasive procedures can help individuals achieve a more youthful look without the need for extensive surgery. The influence of celebrities and social media has contributed to the desire for enhanced aesthetics, as people seek to emulate the looks of their favorite stars.

Segmental Insights

Type Insights

In 2023, the India Minimally Invasive Surgical Devices Market largest share was held by Surgical Scopes segment and is predicted to continue expanding over the coming years. Surgical scopes, including endoscopes and laparoscopes, are fundamental tools in minimally invasive surgery. They play a crucial role in providing surgeons with direct visualization of the surgical site, enabling them to perform procedures with precision. Surgical scopes are versatile instruments that can be used in a wide range of medical specialties, including gastroenterology, urology, gynecology, orthopedics, and more. This versatility allows for their extensive use in MIS procedures across multiple medical fields. Technological advancements in surgical scopes have led to improved imaging capabilities, including high-definition (HD) and three-dimensional (3D) imaging. These enhancements provide surgeons with clear and detailed views of the operative field, contributing to the success of MIS procedures. Minimally invasive surgery relies heavily on direct visualization of internal structures through scopes. Surgical scopes enable small incisions and minimal tissue disruption, reducing patient trauma and promoting faster recovery. Surgical scopes are used for both diagnostic and therapeutic purposes. They allow for the examination of tissues and organs and the performance of procedures such as biopsies, removal of foreign bodies, and treatment of conditions like gallstones or kidney stones.

Surgery Type Insights

In 2023, the India Minimally Invasive Surgical Devices Market largest share was held by Urology segment and is predicted to continue expanding over the coming years. Urological conditions, including kidney stones, benign prostatic hyperplasia (BPH), urinary incontinence, and urologic cancers, are relatively common in India. The high prevalence of these disorders drives the demand for minimally invasive urological procedures. Patients often prefer less invasive treatment options due to factors like reduced pain, shorter recovery times, and smaller incisions. Minimally invasive urological surgeries align with patient preferences. Urology has witnessed significant advancements in minimally invasive techniques, including laparoscopic and robotic-assisted surgeries. These advancements have expanded the range of urological conditions that can be effectively treated with MIS. The adoption of robotic-assisted surgery, such as the da Vinci Surgical System, has greatly enhanced the precision and effectiveness of urological procedures. This technology is particularly valuable in complex urological surgeries. Minimally invasive urological procedures often involve smaller incisions and reduced tissue trauma, which can lead to a lower risk of post-

operative infections, a crucial consideration in urology.

End-User Insights

In 2023, the India Minimally Invasive Surgical Devices Market largest share was held by Hospitals & Clinics segment in the forecast period and is predicted to continue expanding over the coming years. Hospitals and clinics serve as central hubs for healthcare delivery in India. They have the infrastructure, resources, and expertise to offer a wide range of medical services, including minimally invasive surgical procedures. Leading hospitals and clinics in India invest in state-of-the-art equipment and technologies, including MIS devices, to provide high-quality patient care. This attracts patients seeking advanced medical procedures. Many hospitals in India have specialized centers of excellence for various medical specialties, such as cardiology, orthopedics, gastroenterology, and gynecology. These centers often focus on minimally invasive surgeries for specific conditions. Hospitals and clinics have a pool of skilled surgeons and healthcare professionals who are trained in performing MIS procedures. Patients trust the expertise and experience of these professionals. Hospitals offer a full spectrum of healthcare services, from emergency care to post-operative recovery. This comprehensive approach makes them the preferred choice for many patients.

Regional Insights

The North India region dominates the India Minimally Invasive Surgical Devices Market in 2023. North India, particularly cities like Delhi, NCR (National Capital Region), and Chandigarh, has well-developed healthcare infrastructure, including top-tier hospitals and medical facilities. These institutions are equipped with advanced MIS technology and are more likely to adopt and offer minimally invasive surgical procedures. North India is one of the most densely populated regions in the country. The higher population density translates to a larger patient pool, which, in turn, drives the demand for healthcare services and minimally invasive surgeries. The region has become a prominent hub for medical tourism, attracting patients not only from other parts of India but also from abroad. Patients seeking high-quality medical care and minimally invasive procedures often choose hospitals in North India. North India is home to prestigious medical and research institutions, which play a significant role in advancing healthcare practices and promoting the adoption of cutting-edge medical technologies, including MIS devices. The region has witnessed economic growth, leading to increased healthcare spending by individuals. This economic prosperity enables patients to opt for advanced, minimally invasive surgical procedures.

Key Market Players

India Medtronic Private Limited

Olympus Medical Systems India Private Limited

Fujifilm India Private Limited

Johnson & Johnson Medical India Limited

Stryker India Private Limited

Smith & Nephew Healthcare Pvt. Ltd.

KARL STORZ Endoscopy India Pvt. Ltd.

Om Surgicals Private Limited

Western Trading Company

Advin Healthcare Private Limited

Report Scope:

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

Minimally Invasive Surgical Devices Market, By Type:

Handheld Instruments

Surgical Scopes

Cutting Instruments

Guiding Devices

Electrosurgical Devices

Others

Minimally Invasive Surgical Devices Market, By Surgery Type:

Gastrointestinal

Gynecology

Urology

Cardiovascular

Others

Minimally Invasive Surgical Devices Market, By End-User:

Hospitals & Specialty Clinics

Ambulatory Surgical Centers

Others

Minimally Invasive Surgical Devices Market, By region:

North India

South India

East India

West India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Minimally Invasive Surgical Devices Market.

Available Customizations:

India Minimally Invasive Surgical 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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