

Sinus Dilation Devices Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The sinus dilation market is expected to register a CAGR of 8.8% during the forecast period of the study.

The COVID-19 pandemic led to interruptions in routine patient care. Many healthcare organizations have canceled routine clinic visits and elective surgeries to increase and maintain the availability of intensive care and inpatient care beds and have reorganized medical and nursing staff. This has particularly interrupted care for patients with chronic rhinitis. The patients opted for teleconsultations and temporary options for sinus-related problems. For instance, according to a research study published in October 2020, titled "Impact of COVID-19 Pandemic on Ambulatory and Operating Room Rhinology Practice in the US", there was a significant impact of COVID-19 on rhinology practice as the number of in-person care in the office environment and surgical management of sino-nasal and skull base illness has dramatically decreased, with only 1.1% of ambulatory surgery center/hospital operating rooms were allowing elective cases in the country. Hence, this data shows a negative impact of COVID-19 on the market, however, with the decreasing number of cases, long-term impact of SARS-CoV-2 virus on humans, and large-scale vaccination programs around the world, the studied market is expected to regain its full growth potential over the forecast period of the study.

The increasing popularity and demand for minimally invasive surgeries owing to its benefits such as smaller incisions, less scarring, high accuracy and decreased risk of complications, shorter hospital stays, and others, coupled with the high burden of sinusitis around the world are expected to be significant growth factors that are fueling growth in the sinus dilation devices market. For instance, according to the research study published in December 2021, titled "Prevalence of chronic rhinosinusitis in the general population based on sinus radiology and symptomatology", the prevalence of clinically based chronic rhinosinusitis (CRS) was 3% to 6.4%.

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Further, with the growing number of surgeries and increasing demand for minimally invasive surgical procedures, the demand for sinus dilation products is expected to increase which will boost growth in the studied market over the forecast period of the study. For instance, according to a research study published in July 2021, titled "The evolution of sinus surgery in England in the last decade - An observational study", in England, between 2010 and 2019, about 89,495 sinus procedures were performed, with 21.1% increase in the endoscopic surgeries and overall increase in the maxillary, frontal and sphenoid sinus procedures. Hence, with the rising number of sinus-related surgeries, the demand for sinus dilation products is expected to increase which is expected to fuel growth in the studied market.

Additionally, a growing number of technological advancements in sinus dilation devices by the key market players in the area are further expected to have a positive impact on the growth of the sinus dilation devices market during the forecast period of the study. For example, in 2021, Intersect ENT (US) announced the launch of the new Straight Delivery System packaged with the PROPEL Mini Sinus Implant. Therefore, with developments and innovations like these, the use of sinus dilation devices is expected to increase over the years which is anticipated to have a positive impact on the studied market.

However, factors such as risks, complications associated with sinus surgeries, and lack of skilled healthcare professionals are expected to restrain the growth of the sinus dilation devices market during the forecast period.

Sinus Dilation Devices Market Trends

Balloon Sinus Dilation Device is Expected to Hold Significant Market Share in the Product Segment During Forecast Period

Patients with chronic sinusitis who are not responding well to medication and need relief from uncomfortable and painful sinusitis symptoms can benefit from the balloon sinus dilation procedure which is a safe and effective procedure for chronic sinusitis and there are several other advantages of balloon sinus dilation due to which the number of balloon sinus dilation procedures is increasing around the world and thus, the demand for balloon sinus dilation devices is expected to increase over the forecast period and driving growth in the studied market. For example, it is a less invasive procedure, effective at relieving symptoms of chronic sinusitis, faster post-operative recovery time, and others. There are several balloon sinus dilation devices available in the market such as the NuVent balloon sinus dilation system from Medtronic, Audion ET dilation system from Stryker Corporation, Mesire Sinus Balloon Catheter from Meril Life Sciences, among many others.

According to a review study published by Daniel H. Lofgren and Carl Shermetaro in December 2021 on balloon sinuplasty, over the past ten years, the use of balloon sinuplasty for the treatment of chronic rhinosinusitis (CRS) that is resistant to conventional medical therapy has significantly increased. The number of patients choosing to undergo this procedure is increasing because of its decreased risk of complications, quicker recovery time, and minimally invasive nature. Hence, this segment is expected to have a significant market share during the forecast period of the study.

Moreover, the ongoing research and development activities on further improving the balloon sinus dilation devices coupled with the technological innovations and launch of new devices are further expected to boost the demand for balloon sinus dilation devices during the forecast period of the study. For instance, in June 2021, Intersect ENT launched an advanced VenSure balloon sinus dilation system along with Cube 4D navigation system in the United States. The VenSure Balloon and Cube 4D Navigation Systems are used in procedures that are designed to improve debilitating chronic rhinosinusitis (CRS) symptoms. Therefore, due to the above-mentioned factors, the balloon sinus dilation devices segment is expected to hold a significant share in the product segment over the forecast period.

North America is Expected to Hold a Significant Share in the Market Over the Forecast Period

By geography, the North American region is expected to occupy a significant share in the sinus dilation devices market due to the

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factors such as the presence of robust healthcare infrastructure, high burden of sinusitis and related diseases, the launch of new products, and increased burden of risks factors causing sinusitis in the region such as smoking, chronic cold, allergies, asthma, head injury, and other factors. For instance, according to the Canadian Tobacco and Nicotine Survey (CTNS): Summary of Results for 2021, approximately 13.3% (3.3 million) of Canadian people aged 25 and over reported smoking cigarettes, and men (13% or 1.7 million) and women (12% or 1.6 million) both reported a similar level of current smoking prevalence. Hence, the burden of sinusitis is expected to increase in the region, driving demand for sinus dilation devices over the forecast period and boosting growth in the studied market.

In the North American region, the United States is expected to hold a significant market share in the studied market owing to the high burden of sinusitis, the presence of some of the key market players in the country, and the high burden and prevalence of risk factors for sinusitis. For instance, according to the January 2022 update of the Centers for Disease Control and Prevention (CDC), about 28.9 million adults in the United States are diagnosed with sinusitis which is about 11.6% of the total adult population of the country. Further, as per the same source, about 2.7 million visits are made to physician offices with chronic sinusitis as the primary diagnosis in the country. Thus, the high burden of sinusitis is expected to be the major driving factor for the growth of the sinus dilation devices market in the United States.

Further, the risk factors associated with sinusitis such as smoking and asthma, are highly prevalent in the country. They are further expected to increase the burden of sinusitis in the country and thus, fuel growth in the demand for sinus dilation devices for their treatment. For instance, according to the National Center for Environmental Health's report on asthma published in May 2022 on CDC's website, about 25.3 million people (children and adults both) had asthma in 2020 and it was most prevalent among the age group of 35-64 years. Therefore, owing to the factors mentioned above, the United States is expected to hold a significant share in the studied market in the North American region over the forecast period.

Sinus Dilation Devices Market Competitor Analysis

The global sinus dilation devices market is moderately competitive. It comprises several significant players such as Smith and Nephew, Johnson & Johnson Inc., Medtronic, Meril Life Sciences Private Limited, and Olympus Corporation, among many others. The market is expected to grow more competitive with the launch of new devices, mergers and acquisitions, partnerships and other business expansion activities by the key market players.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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