

Laryngoscope Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Laryngoscope Market is expected to register a CAGR of 9.4% over the forecast period.

The COVID-19 pandemic initially had a moderate impact on the laryngoscope market. The strict lockdowns and government regulations intended to slow down the spread of COVID-19 resulted in a decline in the number of patients visiting for non-emergency cases. However, COVID-19 primarily affected the respiratory system, leading to an immediate demand for respiratory and vascular access products, including laryngoscopes. Furthermore, several guidelines and reviews, including those from the UK Difficult Airway Society, the Association of Anaesthetists, the Intensive Care Society, and the Royal College of Anaesthetists, have recommended tracheal intubation with a video laryngoscope in preference to a direct laryngoscope for patients with suspected or confirmed COVID-19 who require intubation. Furthermore, the European Resuscitation Council COVID-19 Guidelines for Advanced Life Support in Adults also mentioned in their guidelines recommending video laryngoscopes. These recommendations led to a higher demand for laryngoscopes. Moreover, several international bodies supported healthcare facilities in strengthening the clinical management response for caring for people with severe COVID-19 infection who need intubation. For instance, in January 2021, the PAHO and WHO donated a video laryngoscope to the Karl Heusner Memorial Hospital Authority (KHMHA). Thus, the COVID-19 outbreak affected the market's growth adversely in its preliminary phase; however, the market gained significant traction due to the increased use of laryngoscopes globally.

Further, the increasing prevalence of laryngeal disease and the rise in the use of laryngoscopes in airway management are among the major factors driving the growth of the market studied. In addition, the high rate of smokers among the population and the increasing incidences of laryngeal cancer are also leading to a higher prevalence of the laryngeal disease. Such factors will likely boost the demand for laryngoscopy, thereby contributing to the market's growth.

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Some common laryngeal diseases include laryngitis, vocal nodules, vocal polyps, Reinke's edema, and epiglottic cyst, among others. In addition, it has been observed that the prevalence of laryngeal disease is higher in males. Moreover, the American Cancer Society estimates that in 2022, there will be about 12,470 new cases of laryngeal cancer (9,820 in men and 2,650 in women) in the United States. Laryngoscopy takes biopsy samples of the vocal cords or nearby parts of the throat to detect cancer further. Thus, the increasing prevalence of the laryngeal disease is poised to accelerate the laryngoscope market globally and is expected to increase in the future, thereby driving the growth of the market studied over the forecast period.

In addition, new product launches and strategic activities by major players in the market are positively affecting the growth of the market studied. For instance, in May 2021, Penlon Limited launched a new and improved range of laryngoscope blades and handles for use in the MRI suite. Thus, due to the product launches and strategic activities, the market studied is expected to grow significantly over the forecast period.

Therefore, owing to the abovementioned factors, it is anticipated that the market studied will witness growth over the forecast period. However, the injuries associated with the use of laryngoscopes are likely to impede the market's growth.

Laryngoscope Market Trends

Video Laryngoscope Segment is Expected to Witness Growth Over the Forecast Period

Video laryngoscope is considered a very innovative advancement in laryngoscopy as it offers various advantages to the operator by allowing him to see what is not within his direct line of sight. Tracheal intubation by video laryngoscope is increasingly being adopted compared to a conventional laryngoscope. In addition, video laryngoscopes also benefit from laryngoscopists requiring less expertise than fiber optic laryngoscopes. Moreover, it also creates an opportunity for remote supervision, which may be helpful for under-resourced hospitals and during prehospital emergency airway management. Hence, owing to the advantages of video laryngoscopes, the demand for these products is likely to increase among physicians, ultimately driving the growth of this market segment.

In addition, according to the Cochrane Collaboration study published in 2022, video laryngoscope probably reduces the number of failed intubations compared to the traditional Macintosh laryngoscope. All video laryngoscopes may also increase the chances of being successfully intubated on the first attempt and improve the view of the vocal cords. Thus, the various benefits that video laryngoscopes offer create opportunities for future growth of the segment.

Furthermore, continuous product launches by major players in the market are positively affecting the segment's growth. For instance, in April 2022, OmniVision, a leading global developer of semiconductor solutions, launched a new laryngoscope reference design that included a range of OmniVision products for single-use video laryngoscopes. This is anticipated to help medical device OEMs speed time-to-market in developing laryngoscopes.

Therefore, the video laryngoscope segment is expected to witness significant growth over the forecast period due to the abovementioned factors.

North America is Expected to Dominate the Laryngoscope Market

North America is expected to dominate the market owing to factors such as the easy availability of technologically advanced products, high medical spending, well-developed medical infrastructure, and the high prevalence of laryngeal disease in the region. For instance, an estimated 7,400 people in Canada were diagnosed with head and neck cancers in 2021. Moreover, an increase in the usage of video laryngoscopes for effective results in the United States is among the key factors contributing to the growth of the market studied in North America.

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Key product launches, the high concentration of market players, and the manufacturer's presence in the United States are some of the factors driving the growth of the laryngoscope market in the country. For instance, in May 2022, Ambu launched its Ambu aView 2 Advance Display Unit for use with endoscopes in Europe and the United States. The Ambu aView 2 Advance can be used with Ambu's bronchoscope, rhinolaryngoscope, or cystoscope while offering the option to transfer recorded data to the hospital's electronic health records. These continuous product launches in the region are anticipated to drive the growth of the market in the country.

Therefore, owing to the aforementioned factors, the market's growth is anticipated in the North American region.

Laryngoscope Market Competitor Analysis

The Laryngoscope market is fragmented due to the presence of several companies operating globally and regionally. The competitive landscape includes an analysis of a few international and local companies that hold market shares and are well-known, including Medtronic, Baxter (Hillrom), Olympus Corporation, Nihon Kohden, Teleflex, Ambu AS, BPL Group (Penlon Ltd), Clarus Medical LLC, Karl Storz, Flexicare Medical Ltd, among others.

Additional Benefits:

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

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