

Endobronchial Ultrasound Biopsy - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The endobronchial ultrasound biopsy market is poised to witness a CAGR of 4.36% over the forecast period.

Initially, COVID-19 impacted the studied market growth due to the cancellations of elective biopsy procedures and surgical procedures. COVID-19 also had an adverse impact on people with co-morbid conditions such as respiratory diseases. However, the market recovered in the last few years since the restrictions were lifted. COVID-19 has had a negligible impact on the endobronchial ultrasound biopsy market in the current scenario and is expected to register a stable growth rate during the forecast period.

Respiratory disorders such as chronic obstructive pulmonary disorder (COPD), tuberculosis, and lung and bronchus cancer use endobronchial ultrasound biopsy to obtain tissue or fluid samples from the lungs and surrounding lymph nodes without conventional surgery to diagnose and detect the severity of diseases. For instance, according to 2022 statistics published by National Health Science, about 1.17 million people in England were diagnosed with COPD in 2021, accounting for 1.9% of the total population. According to the Australian Bureau of Statistics, March 2022 update, 375.8 thousand individuals (1.5%) of all ages had chronic obstructive pulmonary disease in Australia in 2021. Therefore, the rising burden of such diseases is expected to propel market growth.

Furthermore, according to WHO's October 2022 update, an estimated 10.6 million people fell ill with tuberculosis (TB) worldwide in 2021. Endobronchial tuberculosis (EBTB) is an infection of the tracheobronchial tree by *Mycobacterium tuberculosis*, which is very common in TB. Therefore, a large number of tuberculosis cases worldwide is expected to propel the demand for endobronchial biopsy.

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Additionally, the strategic initiatives by market players, such as product launches, partnership, and acquisitions to expand the offerings, contributes significantly to the market growth. For instance, in May 2021, Olympus launched the FDA 510(k)-cleared BF-UC190F endobronchial ultrasound (EBUS) bronchoscope to its EBUS portfolio of devices for minimally invasive lung cancer diagnosis and staging via needle biopsy. The launches of technologically advanced products are expected to boost the demand for such devices during the forecast period.

Therefore, owing to the aforementioned factors, such as the high burden of respiratory diseases and rising product launches by market players, the studied market is anticipated to witness growth over the analysis period. However, the high cost of equipment and lack of reimbursement policies in developing countries are likely to restrain market growth.

Endobronchial Ultrasound Biopsy Market Trends

Cancer Diagnosis Segment is Expected to Hold a Significant Market Share Over The Forecast Period

The main indications of endobronchial ultrasound (EBUS) include primary diagnosis, staging, and restaging of lung cancer. The segment is expected to register a significant growth rate during the forecast period owing to the rising burden of lung cancer worldwide and the rising adoption of endobronchial ultrasound biopsy for cancer diagnosis and technological advancements.

The rising burden of lung cancer cases is expected to propel the market growth. For instance, according to the American Cancer Society (ACS), Cancer Statistics 2023, 1.9 million new cancer cases are predicted to be diagnosed in the United States in 2023. Out of the total cancer cases, Lung & bronchus cancer is estimated to be 238.3 thousand new cases in 2023. As per ACS 2022 report, the estimated number of new lung cancer cases in the United States was 236.7 thousand in 2022. Therefore, the rising lung cancer cases in the region are expected to propel the demand for endobronchial ultrasound biopsy as it is a minimally invasive procedure that can be performed using local anesthesia and moderate sedation.

Furthermore, the rising adoption of minimally invasive procedures is reported to be adopted by end users. For instance, in February 2021, Rela Hospital, India launched the EBUS bronchoscopy service to diagnose lung diseases. The hospital reported that EBUS biopsy is an important method of diagnosis and staging of the lung, useful in lung cancer.

Additionally, the rising clinical trials for the development of innovative endobronchial ultrasound biopsy devices by market players are contributing significantly to the market growth. For instance, in September 2021, Olympus reported the positive results of a pilot study showing the safety and effectiveness of the ViziShot 2 FLEX 19 G EBUS-TBNA Needle in gathering tissue samples critical to guiding the treatment of non-small cell lung cancer (NSCLC). The successful results from the clinical trials are expected to develop and market innovative devices in the forecast years.

Therefore, owing to the aforesaid factors such as the rising burden of cancer, increasing adoption of endobronchial ultrasound biopsy, and clinical trial development of innovative devices by market players, the segment is expected to register a significant growth rate during the forecast period.

North America is Expected to Dominate the Endobronchial Ultrasound Biopsy Market Over The Forecast Period

North America is expected to dominate the market owing to factors such as the high burden of lung cancer and other respiratory diseases such as COPD and TB, rising research and development spending for the diagnostics of diseases, and the high concentration of market players in the region.

According to the Canadian Cancer Society May 2022 update, it was estimated that 30 thousand Canadians will be diagnosed with lung and bronchus cancer, representing 13% of all new cancer cases in 2022. Also, A research study published in Biosystems

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Journal in January 2022 used Electronic Medical Record (EMR) data from primary care clinics in seven provinces across Canada to develop predictive models to identify COPD in the Canadian population. The study stated that approximately 10% of Canadians aged 35 years or older are living with COPD. Therefore, the high burden of such diseases is expected to propel the demand for EBUS biopsy for the early and effective diagnosis of such diseases, which is expected to propel the market growth in the region.

Furthermore, according to the National Institute of Health, Estimates of Funding for Various Research, Condition, and Disease Categories (RCDC), May 2022 update, the spending on R&D in the United States for COPD was USD 144 million in 2021 and USD 150 million in 2022; for tuberculosis, USD 594 million in 2021 and USD 621 million in 2022; and USD 476 million for lung cancer in 2022. Therefore, the rising spending on respiratory diseases research is expected to boost the development of innovative EBUS biopsy devices in the nation which is further expected to augment the market growth during the forecast period.

Therefore, owing to the aforementioned factors such as the high burden of respiratory diseases and government grants for R&D of various respiratory diseases which create opportunities for market players for the development of innovative biopsy devices, the growth of the studied market is anticipated in the North America Region.

Endobronchial Ultrasound Biopsy Industry Overview

The endobronchial ultrasound biopsy market is fragmented in nature due to the presence of several global and local market players. Some key market players are Medtronic PLC, Boston Scientific Corporation, CONMED Corporation, Olympus Corporation, Cook Group Incorporated, ENDO-FLEX GmbH, CLINODEVICE, Medi-Globe Corporation, and Micro-Tech Endoscopy.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Deliverables

1.2 Study Assumptions

1.3 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 Rising Geriatric Population

4.2.2 Increasing Prevalence of Respiratory Disorders

4.2.3 Increasing demand for Minimally Invasive Procedures

4.3 Market Restraints

4.3.1 High Cost of Equipment

4.3.2 Lack Reimbursement Policies in Developing Countries

4.4 Porter's Five Force Analysis

4.4.1 Threat of New Entrants

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- 4.4.2 Bargaining Power of Buyers/Consumers
- 4.4.3 Bargaining Power of Suppliers
- 4.4.4 Threat of Substitute Products
- 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

5.1 By Product

- 5.1.1 Biopsy Forceps
- 5.1.2 Cytology Brushes
- 5.1.3 Biopsy Needles
- 5.1.4 Transbronchial Aspiration Needles
- 5.1.5 Spray Catheters
- 5.1.6 Others

5.2 By Application

- 5.2.1 Cancer Diagnosis
- 5.2.2 Infection Diagnosis
- 5.2.3 Others

5.3 Geography

5.3.1 North America

5.3.1.1 United States

5.3.1.2 Canada

5.3.1.3 Mexico

5.3.2 Europe

5.3.2.1 Germany

5.3.2.2 United Kingdom

5.3.2.3 France

5.3.2.4 Italy

5.3.2.5 Spain

5.3.2.6 Rest of Europe

5.3.3 Asia-Pacific

5.3.3.1 China

5.3.3.2 Japan

5.3.3.3 India

5.3.3.4 Australia

5.3.3.5 South Korea

5.3.3.6 Rest of Asia-Pacific

5.3.4 Middle-East and Africa

5.3.4.1 GCC

5.3.4.2 South Africa

5.3.4.3 Rest of Middle-East and Africa

5.3.5 South America

5.3.5.1 Brazil

5.3.5.2 Argentina

5.3.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

6.1 Company Profiles

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- 6.1.1 ACE Medical Devices Pvt. Ltd.
- 6.1.2 Boston Scientific Corporation
- 6.1.3 CLINODEVICE
- 6.1.4 CONMED Corporation
- 6.1.5 Cook Group Incorporated
- 6.1.6 ENDO-FLEX GmbH
- 6.1.7 Medi-Globe Corporation
- 6.1.8 Medtronic Plc
- 6.1.9 Micro-Tech Endoscopy
- 6.1.10 Olympus Corporation

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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