

## **Italy Endoscopy Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The Italy Endoscopy Devices Market size is estimated at USD 1.10 billion in 2024, and is expected to reach USD 1.49 billion by 2029, growing at a CAGR of 6.13% during the forecast period (2024-2029).

#### **Key Highlights**

- The initial stages of the COVID-19 pandemic significantly impacted the Italian endoscopy devices market, which declined due to strict lockdown restrictions in major cities that prevented the transportation and supply of medical devices. For instance, an article published in February 2021 by PubMed stated that there was a 53.6 % reduction in fast-track endoscopic procedures during the pandemic in Northern Italy. COVID-19's psychological impact influenced patient attitudes toward diagnostic endoscopy, particularly in patients with functional disease.
- However, ever since the restrictions were lifted, the industry has been recovering well. Over the last two years, the market recovery has been led by the high prevalence of diseases that require endoscopy, new product launches, and increased demand for minimally invasive surgeries. For instance, according to a 2022 report from Euractive, 400,000 surgeries were postponed during the pandemic, which considerably increased the number of patients on the waiting list. Once the restrictions were lifted, the market experienced a huge surge in diagnostics and surgeries, which is anticipated to boost the market growth in the coming years.
- The demand for various endoscopy devices is anticipated to rise due to increased demand for surgeries with faster recovery, high prevalence of chronic diseases, fewer post-surgery infections, less pain, reduced scarring, better control of bleeding, and increased accuracy of the surgeries. For instance, an article published by PubMed in October 2022 stated that Italy's endoscopic screening for colorectal cancer is adequate and of high quality. Hence, there is likely to be a high demand for endoscopic evaluations in hospitals which will drive the market during the forecast period.
- Furthermore, as per an article published in July 2022 by PubMed, the Italian Association of Gastroenterologists and Endoscopists

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(IAGE), the Italian Society of Digestive Endoscopy (ISDE), and the Italian Society of Gastroenterology (ISG) have produced a joint document based on the review of American Society for Gastrointestinal Endoscopy (ASGE), American College of Gastroenterology (ACG), British Society of Gastroenterology (BSG), European Society of Gastrointestinal Endoscopy (ESGE), and Asian Consensus Esophagogastroduodenoscopy (EGD) position papers to indicate the quality standards of esophagogastroduodenoscopy (pre-, intra-, and post-procedure) focused on lesion detection to be adopted in the Italian context.

-Such initiatives and documentation associated with endoscopic practices lead to a better understanding of endoscopy's quality standard, which will likely promote market growth over the forecast period. Technological advances in surgical techniques and enhancement in equipment handling have transformed surgical procedures, including the introduction of minimally invasive surgeries.

-There has been an increased usage of endoscopic devices in disease diagnosis in the past few years. Endoscopes are used to prevent, diagnose, and treat various diseases. For instance, in an article published in August 2022 by Agenzia Italia, every year, there are about 43,000 new diagnoses of colorectal cancer in Italy. A minimally invasive surgical technique named Transanal Total Mesorectal Excision (TaTME) was introduced as a novel technique to deal with rectal cancer. The surgery was performed in Santissima Trinita hospital in Cagliari.

-Endoscopy is the preferred method for detecting disease progression and complications. Due to the increase in acceptance and success rate of minimally invasive surgeries, people tend to adopt these techniques, which is anticipated to increase demand for endoscopes. Furthermore, the diseases that require endoscopy are growing abundantly in Italy. Adding to that, the importance of early detection has already been a major factor in the case of diseases like cancer. For instance, a report published in April 2022 by La Repubblica stated that the genetic characteristics of gastric cancer and the significant boost for early detection make surgical and medical treatments more beneficial in terms of overall survival.

-Hence, Italy's endoscopy devices market is anticipated to witness growth over the forecast period due to the high prevalence of chronic diseases and the increase in the demand for minimally invasive surgeries. However, the lack of skilled technicians and the side effect associated with devices are anticipated to restrain the market growth.

## Italy Endoscopy Devices Market Trends

Flexible Endoscopes is Expected to Hold a Significant Share in the Italy Endoscopy Devices Market Over the Forecast Period.

- Flexible endoscopes are made of movable, easily manipulable tubes that are used to view internal organs, whereas rigid endoscopes are used to view organs along a vertical axis. Flexible endoscopes are used in most minor surgeries and are widely used in hospitals, clinics, and physician's offices to perform procedures associated with gastrointestinal problems and lower abdominal issues.

- The future market growth of flexible endoscopy looks promising with evolving advanced imaging systems, endoscopes with improved capabilities, and enhancement of targeted therapeutics. These devices can escalate patient safety and minimize personnel exposure to the liquid chemical germicide and its vapors. Flexible endoscopes diagnose and treat gastrointestinal problems such as stomach pain, reflux, gastroesophageal reflux disease (GERD), ulcers, gastritis, difficulty swallowing, digestive tract bleeding, and colon and rectal cancer.

- For instance, according to the Associazione Italiana Di Oncologia Medica (AIOM) 2021 cancer estimates, in 2021, there were 233,200 instances of colorectal cancer in women and 280,300 cases of colorectal cancer in men. Thus, the high incidence of colon and rectum cancer leads to increased demand for flexible endoscopic evaluations, thereby boosting market growth.

- Furthermore, product launches, collaborations, and contracts by the key players in Italy will likely boost market growth over the forecast period. For instance, in November 2021, Medical Devices Group SRL, an endoscopy manufacturer in Italy, implemented an automated endoscopy sink equipped with two washing and two dosing tanks. Such developments are likely to boost market growth over the forecast period.

- Hence, due to the increasing burden of cancer and demand for flexible endoscopes, the Italian endoscopic devices market is

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anticipated to witness growth during the forecast period.

## Gastroenterology Segment is Anticipated to Witness a Growth in the Italy Endoscopy Devices Market Over the Forecast Period

- Gastroenterology focuses on disorders of the digestive system. Gastroenterologists' responsibilities include diagnosing and treating conditions affecting the esophagus, stomach, intestines, liver, biliary tract, and pancreas. An endoscopy can help determine what's causing digestive signs and symptoms, such as heartburn, nausea, vomiting, abdominal pain, difficulty swallowing, and gastrointestinal bleeding.

- Factors such as the rise in gastroenterology disorders, increase in demand for endoscopic procedures for diagnosing gastric-related diseases, and surge in research and development associated with gastro endoscopy in Italy are anticipated to boost the market growth during the forecast period.

- For instance, as per the Associazione Italiana Di Oncologia Medica (AIOM) 2021 estimations, the number of people affected with stomach cancer in Italy in 2021 was estimated to be 82,400 . As the number of stomach cancer cases increases, the demand for diagnosis of disease progression also increases, thereby boosting the market growth over the forecast period. Furthermore, research and development in gastro endoscopy are anticipated to boost market growth during the forecast period.

- For instance, in January 2022, the Institute for Research, Hospitalization, and Healthcare (IRCCS) Foundation San Matteo Polyclinic sponsored a clinical study to estimate eosinophilic gastrointestinal disorders (EGIDs) prevalence in patients with gastrointestinal (GI) symptoms undergoing upper and lower GI endoscopy, to verify whether the global increase of EGIDs also affects the Italian population.

- Moreover, in May 2022, San Raffaele Hospital in Milan sponsored a clinical study to compare manual versus stapled side-to-side ileocolic anastomosis in Crohn's Disease. The study compared six months of endoscopic recurrence between the local and central reading of recordings of endoscopy using the modified Rutgeerts classification.

- Hence, the Italian endoscopy market is anticipated to witness growth during the forecast period due to the rise in gastroenterological disorders and the increase in research and development associated with gastro endoscopic techniques.

## Italy Endoscopy Devices Industry Overview

The market is competitive and consists of several global players. As the market is progressing, the firms are trying to achieve clear differentiation in endoscopic systems, based on their application. Market leaders with more funds for research and a better distribution system have established their position in the market. The major market players are Boston Scientific Corporation, CONMED Corporation, Cook Group Incorporated, Medtronic PLC and Johnson & Johnson among others.

### Additional Benefits:

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

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