

South Africa Endoscopy Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The South Africa endoscopy devices market size is expected to grow from USD 417.78 million in 2024 to USD 558.57 million by 2029, at a CAGR of 5.98% during the forecast period (2024-2029).

Key Highlights

- The COVID-19 pandemic significantly impacted the market studied due to the limitations on hospital visits for non-emergencies in the initial phase of the pandemic. The majority of endoscopy activities were reduced during the pandemic in South Africa. Data from the Natica. Data from the National Institute of Health published in November 2021 indicated that almost 75% of the doctors had reduced their endoscopic procedures in the country by 50%. As the focus of healthcare companies was diverted toward COVID-19 diagnosis and care, the market studied was affected greatly.
- However, currently, the market has reached its pre-pandemic nature in terms of the number of endoscopic procedures performed and is expected to witness significant growth in the coming years. The key factors propelling the market growth include increasing adoption of endoscopy for treatment and diagnosis and technological advancements leading to enhanced applications.
- The data from World Population Review published in July 2023 mentioned that South Africa's population is estimated to be 69.3 million people in 2023, 9.2% of whom were aged over 60 years, and the number of older adults in South Africa is projected to increase to 15.4% of the total population by 2050. Such an increase in the geriatric population is causing an increase in diseases such as gastrointestinal diseases and various cancers related to the gastric system that require endoscopy procedures for their treatment.
- For instance, the data from a survey published by the National Institute of Health in November 2021 indicated that over 73.6% of the people in South African respondents had undergone endoscopy procedures during the year 2021. Hence, this is expected to drive the demand for endoscopy devices and drive the growth of the market studied.
- Moreover, the rising healthcare spending and the number of hospitals are more likely to support the target market's expansion in

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the country. For instance, in April 2022, the Netcare Property Holdings Joint Venture opened a 400-bed multi-specialty hospital in South Africa. With such multi-specialty hospitals in the country, essential procedures such as endoscopy are largely performed. Thus, such expansion of hospitals in South Africa is expected to create opportunities for endoscopy devices, fueling market growth.

-However, the lack of skilled technicians and infections caused by few endoscopes are hindering market growth.

South Africa Endoscopy Devices Market Trends

Endoscopy Visualization Equipment Segment is Expected to Witness Rapid Growth in the Market Studied

- An endoscopy visualization system is used to visualize and interpret endoscopic images of all endoscopy surgeries in high definition. Several companies have a strong presence in the country, which is contributing to the segment growth as these companies are developing new technologies in the endoscopy visualization space. For instance, in September 2022, Olympus Corporation launched VISERA ELITE III, its newest surgical visualization platform that addresses the needs of healthcare professionals (HCPs) for endoscopic procedures across multiple medical disciplines. VISERA ELITE III is available in Africa, including several other regions.

- Furthermore, non-communicable respiratory diseases are increasing in the country, which is fueling the segment growth. For instance, according to an article from Pats Journal published in January 2021, it was observed that Africa is home to over 1 billion people, and around 2.6 million people are affected by Tuberculosis. Moreover, the same study estimated that Asthma cases in Africa were around 34.1 million (12.1%) among children, 64.9 million (11.8%) among people aged 45 years, and 74.4 million (11.7%) in the total population as of January 2021.

- Additionally, the prevalence of chronic obstructive pulmonary disease(COPD) was around 7.7% in Nigeria and 19% in South Africa. The statistics indicate that respiratory diseases are causing a significant burden in South Africa, which is believed to boost the demand for endoscopy visualization systems for the diagnosis and treatment of such diseases in the coming years.

Gastroenterology is Expected to Hold a Major Share in the Market

- Gastroenterology is one of the most crucial fields for endoscopy, as most gastroenterological procedures are performed with the help of endoscopes.

- The burden of various gastric diseases is on the rise in South Africa, which is propelling the demand for endoscopy procedures. For instance, as per the data from Karger AG, an academic journal published in August 2021, it was found that the prevalence of Helicobacter pylori infection (HPI) in South Africa is as high as 70.1%. One of the most crucial tools to diagnose the presence of this infection is the endoscope, which is widely used in the country. Hence, with the emergence of such diseases, the segment is expected to witness significant growth during the forecast period.

- In addition, as per a February 2021 published article from the National Institute of Health, at least one gastroenteritis virus is detected in 47% (96/205) of children in South Africa annually. With the high prevalence of gastroenteritis in the country, the demand for endoscopic procedures is on the rise. Furthermore, there is a growing adoption of new technology in the country, which is surging the segment growth.

- For instance, in June 2021, the Division of Medical Gastroenterology at the University of Cape Town (UCT) completed South Africa's first successful intestinal enteroscopy (endoscopy of the small bowel). The innovative operation, which was performed at Groote Schuur Hospital (GSH), is expected to revolutionize how clinicians access and study the small bowel, which was previously unreachable using a minimally invasive method.

- Therefore, the prevalence of gastrointestinal disorders in South Africa is expected to fuel the market growth.

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South Africa Endoscopy Devices Industry Overview

The south africa endoscopy devices market is moderately competitive with several major players. Some of the strategies implemented include agreements, collaborative models, business expansion, and product development. Some of the key players in the market include KARL STORZ, Boston Scientific Corporation, Johnson and Johnson, Pentax Medical, and Fujifilm Holdings Corporation, among others.

Additional Benefits:

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

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