

India Non Invasive Surgery Market By Type (Radiosurgery, Lithotripsy, Defibrillation, Brachytherapy, Non-Invasive Ventilation, Oxygen Therapy, Others), By Application (Oncology, Cardiology, Renal Disorders, Gynecology, Urology, Dermatology, Neurology, ENT, Others), By End User (Hospitals & Clinics, Ambulatory Surgical Centers, Specialty Clinics, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Report description:

India Non Invasive Surgery Market was valued at USD 472.75 Million in 2024 and is expected to reach USD 744.73 Million by 2030 with a CAGR of 8.04% during the forecast period. Non-invasive surgery, also known as non-surgical or minimally invasive procedures, refers to a range of medical interventions that do not necessitate any incisions or tissue removal. These cutting-edge surgeries rely on advanced technological devices and techniques to achieve remarkable results. For example, lasers, ultrasound, and MRI are utilized in radiation therapy for cancer treatment, while endoscopes enable the thorough examination of internal organs.

One of the key advantages of non-invasive surgeries is their ability to minimize patient discomfort and pain. Unlike traditional surgical methods, they leave behind minimal scarring, allowing individuals to recover more swiftly and resume their daily activities sooner. The risk of infection associated with these procedures is significantly lower. With their numerous benefits, non-invasive surgeries have revolutionized the medical field and continue to provide patients with safer and more effective treatment options.

Key Market Drivers

Rising Prevalence of Chronic Disorders

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The rising prevalence of chronic disorders in India has significantly amplified the demand for non-invasive surgery. This trend is driven by the escalating rate of conditions such as cardiovascular diseases, diabetes, and obesity, alongside the country's aging population. Non-invasive surgeries are increasingly seen as the optimal solution due to their minimal downtime, lower risk of infection, and reduced postoperative discomfort, making them an attractive alternative to traditional surgical procedures. Advancements in medical technology have allowed for greater precision and efficiency, further enhancing the appeal of non-invasive interventions. The burgeoning middle class in India, with their increased access to information and higher disposable income, is also contributing to this demand. They are seeking out high quality, less invasive healthcare solutions, and are willing to invest in procedures that offer quicker recovery and lesser complications. This surge in demand is encouraging hospitals and healthcare centers across India to invest in equipment and training for non-invasive procedures, thus driving a paradigm shift in the country's healthcare landscape. This alignment of technological advancement, economic prosperity, and a growing health-conscious population is creating a robust environment for the expansion of non-invasive surgery in India.

Growing Geriatric Population

The escalating demand for non-invasive surgery in India can be significantly attributed to the growing geriatric population. As people age, the prevalence of chronic diseases rises, necessitating more medical interventions. Invasive surgeries, however, pose substantial risks for older adults, including longer recovery times and an elevated risk of complications. Non-invasive surgeries offer a viable alternative, decreasing the risk factors associated with traditional surgery. These procedures, such as laparoscopic surgery, often result in less pain, shorter hospital stays, and quicker recovery times. This makes them an ideal option for the elderly, allowing them to regain their health without enduring the rigorous toll of invasive surgery.

India's improving healthcare infrastructure, coupled with increasing accessibility to advanced medical technology, is making non-invasive procedures more attainable for patients across the country. The availability of specialized equipment and skilled healthcare professionals enhances the quality of care provided during non-invasive surgeries. The use of advanced imaging techniques, such as MRI and ultrasound, enables precise and accurate diagnosis, leading to more targeted interventions. The cost-effectiveness of non-invasive procedures compared to invasive surgeries is another factor driving their demand. Non-invasive surgeries often require shorter hospital stays, reducing the overall healthcare expenses for patients. This affordability aspect makes these procedures accessible to a wider range of individuals, including those from lower socioeconomic backgrounds.

Increasing Outpatient Surgeries

The surge in outpatient surgeries in India is significantly stimulating the demand for non-invasive procedures. This upswing is attributed to the growing awareness among patients about the advantages of non-invasive surgeries, such as minimal scarring, reduced pain, lower risk of infection, shorter hospital stays, and quicker recovery times. In addition, the incorporation of state-of-the-art technologies, such as robotic surgery and laser procedures, is adding further impetus to this trend. These cutting-edge techniques enable precision and control, enhancing surgical outcomes and patient satisfaction. As healthcare providers strive to optimize resources and meet the increasing demand for efficient and cost-effective solutions, outpatient surgeries present an appealing option. With their efficiency, shorter hospital stays, and reduced healthcare costs, outpatient surgeries alleviate the burden on hospitals and contribute to a more streamlined healthcare system.

The advent of telemedicine is propelling the viability of outpatient surgeries even amidst rural and remote demographics, breaking down geographical barriers. Patients in remote areas now have access to specialized medical care without the need for long and costly travel. This advancement in healthcare delivery is revolutionizing the landscape of healthcare in India and improving the overall accessibility and quality of care. Consequently, the increasing inclination towards outpatient surgeries is fuelling the shift from traditional surgical methods to non-invasive alternatives, reshaping the healthcare landscape in India. As patients continue to seek safer and more efficient treatment options, the demand for non-invasive procedures will continue to grow, driving innovation and advancements in the field of healthcare.

Key Market Challenges

Lack of Skilled Professionals

In India, the demand for non-invasive surgery is experiencing a remarkable decrease, primarily attributable to a critical lack of skilled professionals. Non-invasive procedures require a high level of precision and expertise, underlining the need for well-trained medical professionals. The deficit in the number of proficient practitioners has consequently resulted in a declining consumer confidence. Potential patients frequently express concerns about the quality of care and the risk involved in non-invasive

procedures if performed by less experienced surgeons. This factor is significantly impacting the preference of patients, tilting the scale towards traditional surgical methods that are perceived to be safer due to the larger pool of experienced surgeons. The Indian healthcare system, despite its inherent potential for growth and innovation, struggles with this skill shortage, hampering the adoption of non-invasive surgical techniques. Thus, the lack of trained professionals in this field imposes a significant hurdle to the demand for non-invasive surgery in India.

Stringent Regulatory Framework

The demand for non-invasive surgery is currently experiencing a downward trend, largely due to an increasingly stringent regulatory framework. These regulations, aimed at ensuring patient safety and high-quality medical practices, place substantial demands on medical institutions and practitioners. They require advanced equipment, rigorous training, and meticulous record-keeping, all of which significantly increase operational costs. As a result, many healthcare providers are hesitant to offer non-invasive surgical options, pushing potential patients towards traditional surgical methods. The complex approval processes and frequent inspections create further barriers to entry and sustainability for hospitals and clinics. This regulatory strictness, while important for maintaining high standards of healthcare, inadvertently discourages the adoption and availability of non-invasive surgery in Indian healthcare institutions, thereby decreasing its demand among patients. Consequently, it is imperative to strike a balance between regulatory rigour and the promotion of advanced, less invasive surgical procedures. This might include the provision of incentives, such as subsidies for equipment purchase, or tailored training programs to help practitioners meet these high standards, thereby stimulating the demand for non-invasive surgery.

Key Market Trends

Increasing R&D Investment

India's healthcare sector is poised for significant growth, and the demand for non-invasive surgeries is set to rise. The key driver of this surge is the significant increase in Research & Development (R&D) investment. When R&D investment increases, it accelerates innovation in medical technology, resulting in the development of advanced non-invasive surgical procedures. For instance, in May 2024, Medtronic, a US-based medical device leader, announced that its rapidly expanding Engineering and Innovation Centre (MEIC) in Hyderabad will become its largest global R&D hub by 2025, employing approximately 1,500 engineers with a total investment of USD 350 million. The company is also exploring the establishment of a manufacturing unit for products such as pacemakers, heart valves, surgical laparoscopic systems, and orthopedic implants, aligning with the shift towards minimally invasive surgery. Discussions are in the early stages with the state government regarding the potential setup of this unit at the Sultanpur medical device park. These methods are typically less risky, less painful, and less time-consuming than traditional surgery. As a result, they are likely to gain preference among potential patients. The Indian population is growing and aging, which will naturally lead to a higher demand for medical procedures, including non-invasive surgeries. Increased R&D can help to meet this demand by improving the effectiveness and efficiency of these procedures. The increased investment will also help in training medical professionals, which is crucial in a country where there is a shortage of well-trained doctors and nurses. Therefore, higher R&D investment will not only enhance the quality of non-invasive surgical procedures but also improve their accessibility, thus driving up demand in the Indian healthcare market.

Technological Advancement in Minimally Invasive Surgery Devices

Technological advancements in minimally invasive surgery devices signify a transformative shift in India's healthcare industry. These cutting-edge technologies have made surgeries safer, quicker, and less painful, increasing their demand. The most significant benefit of minimally invasive procedures lies in their reduced post-operative complications and quicker healing time. This helps increase patient comfort and reduces hospitalization duration, making it a preferred choice for numerous patients and medical professionals alike. India's rapidly growing middle class and aging population are contributing to a higher incidence of chronic diseases, escalating the need for non-invasive surgeries. The Indian Government's initiatives, such as the Pradhan Mantri Jan Arogya Yojana (PMJAY), have increased access to healthcare, with minimally invasive procedures now being within the financial reach of a larger population segment. Hospitals are investing in high-end minimally invasive devices to cater to this upsurge in demand. Considering these factors, it is evident that the technological advancements in minimally invasive surgery devices will lead to an increasing demand for non-invasive surgeries in India.

Segmental Insights

Application Insights

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Based on application, cardiology emerged as the fastest growing segment in India Non-Invasive Surgery Market during the forecast period. This can be attributed to several factors. There is an alarming increase in the prevalence of cardiovascular diseases in India, which has created a pressing need for advanced cardiac treatments. The rise in the aging population has contributed to the growing demand for non-invasive cardiac procedures. The advancements in medical technology have also played a crucial role in expanding the scope of non-invasive surgical options available in cardiology. The growing awareness among individuals about the benefits of early diagnosis and treatment of cardiac conditions has fueled the demand for non-invasive surgery in this field. As a result, cardiology stands at the forefront of the India Non-Invasive Surgery Market, offering innovative and effective solutions for patients in need.

Regional Insights

Based on Region, West India emerged as the dominant region in the Indian market for Non Invasive Surgery in 2024. This can be attributed to the presence of major cities like Mumbai and Pune, which are renowned healthcare hubs housing a multitude of top-tier hospitals and clinics. These healthcare facilities have not only embraced cutting-edge surgical techniques but have also shown a remarkable inclination towards non-invasive procedures. In addition to the advanced medical practices, these hospitals and clinics in Maharashtra have established robust collaborations with research institutions and pharmaceutical companies. This collaborative approach fosters continuous innovation and the development of novel non-invasive surgical solutions. The availability of state-of-the-art infrastructure, including advanced imaging technologies and minimally invasive surgical tools, further enhances the region's capabilities in delivering highly effective non-invasive treatments to patients.

Key Market Players

- India Medtronic Private Ltd
- Abbott India Ltd.
- Intuitive Surgical India Pvt. Ltd.
- B Braun Medical (India) Pvt. Ltd.
- Boston Scientific India Pvt. Ltd.
- Conmed Linvatec India Pvt. Ltd.
- Siemens Healthineers India
- Olympus Medical Systems India Pvt. Ltd.
- Wipro Ge Healthcare Pvt Ltd.
- Stryker India Pvt. Ltd.

Report Scope:

In this report, the India Non Invasive Surgery Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□ India Non Invasive Surgery Market, By Type:

- o Radiosurgery
- o Lithotripsy
- o Defibrillation
- o Brachytherapy
- o Non-Invasive Ventilation
- o Oxygen Therapy
- o Others

□□ India Non Invasive Surgery Market, By Application:

- o Oncology
- o Cardiology
- o Renal Disorders
- o Gynecology
- o Urology
- o Dermatology

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- o Neurology

- o ENT

- o Others

□□India Non Invasive Surgery Market, By End User:

- o Hospitals & Clinics

- o Ambulatory Surgical Centers

- o Specialty Clinics

- o Others

□□India Non Invasive Surgery Market, By Region:

- o North

- o South

- o West

- o East

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Non Invasive Surgery Market.

Available Customizations:

India Non Invasive Surgery Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

□□Detailed analysis and profiling of additional market players (up to five).

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