

Ablation Technologies - A Global Market Overview

Market Report | 2025-01-22 | 335 pages | Industry Experts

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Report description:

Ablation Technologies Market Size, Trends and Outlook

Ablation therapy can be described as a minimally invasive treatment that makes use of heat, cold or chemicals for destroying abnormal tissues or tumors. The variety of conditions where this treatment can be applied include cardiovascular, cancer, gynecological, ophthalmological, orthopedic and urological, in addition to pain management. In cancer treatment, for example, either extremely high or low temperatures are employed to eliminate one layer or several layers of the malignant tissue. The primary difference between ablation therapy and surgical resection is that the former does not involve the removal of an entire or a part of an organ. Some of the more widely used technologies for ablation include cryoablation, electrical ablation, hydrothermal ablation, laser/light ablation, microwave ablation, pulsed field ablation, radiofrequency (RF) ablation and ultrasound ablation. Major end-users of Ablation Technologies include hospitals, ablation centers, ambulatory surgical centers, medical spas & aesthetic clinics and surgical centers.

The global demand for Ablation Technologies is expected to maintain a CAGR of 11.5% between 2024 and 2030 in reaching a projected US\$12.9 billion by 2030 from an estimated market size of US\$6.7 billion in 2024. Since Ablation Technologies offer a high degree of accuracy, along with reduced recovery times and minimal complication risks, the demand for them has witnessed impressive growth over the past few years, with this trend likely to maintain an upswing over the coming period. The wide use of these therapies to treat life-threatening conditions, such as various types of cancers and atrial fibrillation & other cardiac arrhythmias has been instrumental in driving the market.

Developments in imaging and guidance systems, owing to which the accuracy and effectiveness of ablation procedures get enhanced, are also key to greater utilization of Ablation Technologies. For instance, MRI and CT scans offer real-time images of specific infected areas that are targeted using these technologies, which limit damage to surrounding healthy tissues to a minimum.

Lifestyle changes have resulted in a populace that, despite being well-off in terms of monetary benefits, has to confront a variety of health-related challenges. The incidence of cancers and cardiovascular diseases has been growing at an alarming rate, necessitating adequate therapeutic procedures that can reduce the risk of premature deaths, among which minimally invasive Ablation Technologies are playing a critical role.

Development of innovative technologies through R&D efforts has also been a crucial factor to propel demand for these therapies. Pulse-Field Ablation (PFA) is one such emerging and potential ablation technology that has shown great promise in treating cardiac diseases. The tissue selectivity feature of this non-thermal technology enables in safeguarding neighboring tissues from

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harm and its use for arrhythmias has yielded positive results in most preclinical and clinical studies.

Ablation Technologies Regional Market Analysis

North America is expected to be the largest global market for Ablation Technologies, owing to the presence of several healthcare industry leaders in the United States. The number of individuals being diagnosed with cardiovascular conditions and cancer in the region has grown by leaps and bounds, and adding to this is a growing population of elderly people that can be more vulnerable to chronic illnesses.

On the other hand, the market for Ablation Technologies in Asia-Pacific will likely post the fastest growth during the 2024-2030 analysis period. This can be attributed to several initiatives taken by various governments for effectively treating conditions, such as cancers and cardiovascular ailments. Moreover, the adoption of Ablation Technologies, because of their minimally invasive feature, has been growing at an appreciable rate in the region and would continue in the same vein. Other factors driving demand for Ablation Technologies in Asia-Pacific include adoption of innovative technologies, growing healthcare infrastructure and greater disposable income among individuals, especially in countries, such as China and India.

Ablation Technologies Market Analysis by Type

Radiofrequency (RF) Ablation is the most widely used technology type, the major reason for which is the growing use of the same in the areas of oncology, cardiology, cosmetology, gynecology and pain management. These ablaters are also quite economical and easily integrated with existing medical procedures. Incidences of cardiovascular diseases, such as atrial fibrillation and tachycardia, have resulted in propelling the market for RF ablation devices due to their above-average success rates. However, Pulsed Field Ablation (PFA) has emerged as a highly viable alternative to RF Ablation and Cryoablation, particularly in the area of cardiovascular disease applications. Compared to the former technologies that are prone to cause damage to non-targeted tissues, particularly the esophagus and phrenic nerve, PFA is a non-thermal technique, administered in high-voltage and very brief pulses to destroy the cells causing arrhythmia, with no collateral damage reported to other tissues. Another advantage of this technology is a considerable reduction in procedural time, thereby resulting in higher success rates and limiting the need for repeat procedures.

Ablation Technologies Market Analysis by Application

On the basis of application, the use of Ablation Technologies for Cardiovascular Disease Treatment accounts for the largest market share. The number of cases related to cardiac problems reported across the globe has been witnessing rapid growth, owing to which the need for appropriate technologies, especially of the minimally invasive variety, such as ablation, to overcome the same are much required. However, the market for Ablation Technologies as employed for Cancer treatment will record the fastest growth. Uncontrolled progression of this dreaded disease that can affect virtually every organ of the human body has resulted in increasing the demand for minimally invasive treatment procedures, such as ablation. Further, data reveals that nearly 50% of the people with cancer are found in developing countries, owing to which the need for Ablation Technologies in these regions will maintain healthy growth.

Ablation Technologies Market Analysis by End-User

Based on end-use sector, the global market for Ablation Technologies has been categorized into Ablation Centers, Ambulatory Surgical Centers, Hospitals, Medical Spas & Aesthetic Clinics and Surgical Centers. Among these, Hospitals corner the largest share of the demand for Ablation Technologies. The number of ablation procedures carried out in hospitals is significantly higher than other settings due to the availability of skilled healthcare professionals and advanced equipment. However, the market for Ablation Technologies as used in Ambulatory Surgical Centers is likely to post the fastest growth over the analysis period. These modern healthcare facilities offer same-day surgical care for diagnostic and preventive procedures, making them popular for smaller interventional actions.

Ablation Technologies Market Report Scope

This global report on Ablation Technologies analyzes the global and regional markets based on type, application and end-user for 2021-2030 period with forecasts from 2024-2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2023

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Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 40+

Ablation Technologies Market by Geographic Region

- North America (The United States, Canada and Mexico)
- Europe (France, Germany, Italy, Russia, Spain, The United Kingdom and Rest of Europe)
- Asia-Pacific (China, Japan, India, South Korea and Rest of Asia-Pacific)
- South America (Argentina, Brazil and Rest of South America)
- Middle East & Africa

Ablation Technologies Market by Type

- Cryoablation
- Electrical Ablation
- Hydrothermal Ablation
- Laser/Light Ablation
- Microwave Ablation
- Pulse-Field Ablation (PFA)
- Radiofrequency (RF) Ablation
- Ultrasound Ablation

Ablation Technologies Market by Application

- Cancer Treatment
- Cardiovascular Disease Treatment
- Cosmetic/Aesthetic Surgery
- Gynecological Treatment
- Ophthalmological Treatment
- Orthopedic Treatment
- Pain Management
- Urological Treatment

Ablation Technologies Market by End-User

- Ablation Centers
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- Hospitals
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- Surgical Centers

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- Dornier MedTech
- Eco Medical
- EDAP TMS S.A.
- Elekta AB
- Ethicon, Inc. (Johnson & Johnson)
- Halyard Health, Inc.
- Hologic, Inc.
- IceCure Medical Ltd

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- Japan Lifeline Co Ltd.
- Johnson & Johnson
- Medtronic Plc.
- Merit Medical Systems, Inc.
- Mermaid Medical
- MicroPort Scientific Corp
- Minimax Medical Holding Group
- Misonix, Inc.
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