

Electrosurgical Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Electrosurgical Devices Market size is estimated at USD 7.04 billion in 2025, and is expected to reach USD 9.46 billion by 2030, at a CAGR of 6.07% during the forecast period (2025-2030).

Key Highlights

- The COVID-19 pandemic had a significant impact on the market studied. This situation resulted in the cancellation of surgeries to manage and reserve resources, and many hospitals faced a shortage of professionals to assist with these surgeries. For instance, a PubMed study published in December 2021 showed that the overall rate of surgical procedures decreased by 48.0% during the initial shutdown of elective procedures compared to the same period in 2019 in the United States. This decline in surgical procedures also led to a decreased demand for electrosurgical devices, which significantly impacted the market growth during the pandemic.
- At that time, the market study reached its pre-pandemic nature in terms of demand for electrosurgical devices as COVID-19-related restrictions had been eased. Moreover, the market is expected to register significant growth in the coming years due to the prevalence of chronic diseases and technological advancements in electrosurgical devices.
- Further, the electrosurgical devices market is expected to grow due to factors such as a rise in chronic diseases and the geriatric population, increasing demand for minimally invasive procedures, and technological advancements in electrosurgical instruments.
- The rise in chronic diseases and the geriatric population is contributing to market growth. For instance, as per the January 2022 update by BHF, nearly 284,000 people were waiting for time-critical heart operations and other heart procedures at the end of November 2021. As electrosurgery devices are used in cardiovascular surgeries, the statistics indicate that the demand for electrosurgical devices is expected to increase due to the high burden of cardiovascular and other chronic diseases.
- Further, as the geriatric population is more prone to various chronic diseases such as cardiovascular diseases, musculoskeletal disorders, and neurological disorders, among others, the increasing geriatric population is expected to have a significant impact

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on the studied market. For example, according to the World Population Prospectus 2022, the share of the global population aged 65 years or above is projected to rise from 10% in 2022 to 16% in 2050. Hence, the increasing geriatric population is likely to boost the demand for electrosurgical devices, thereby driving market growth.

- Furthermore, an increase in surgical procedures and a rise in product launches coupled with technological advancements are expected to augment the market growth over the forecast period. For instance, according to the NICOR Adult Cardiac Surgery Report 2022, total aortic valve (TAVI) procedures increased by 11% in 2021. The ratio of TAVI to aortic valve replacement (AVR) rose from 1.2:1 to 2.3:1 compared to previous.

- Also, various strategic activities by the key players are expected to drive market growth over the forecast period. For instance, in September 2021, Olympus Corporation launched POWERSEAL 5mm Curved Jaw Tissue Sealer and Divider, which meets the highest standards of clinical performance for advanced bipolar surgical energy devices by delivering consistent sealing reliability in an ergonomic, multifunctional design that promotes procedural efficiency.

- Thus, due to the increase in chronic diseases, the rise in the geriatric population, and the surge in minimally invasive surgeries coupled with product launches, the studied market is expected to witness significant growth over the forecast period. However, the lack of trained professionals in surgery and stringent regulatory frameworks are the major factors hindering market growth.

Electrosurgical Devices Market Trends

Neurosurgery Segment Is Expected to Witness a Healthy Growth in the Market Over the Forecast Period

- The neurosurgery segment is expected to witness healthy growth in the studied market owing to the rising burden of neurological diseases and disorders around the world, leading to the increasing volume of surgical procedures, which may boost the growth in the segment over the forecast period. Also, various technological advancements and strategic activities by the key players are expected to augment the segment growth over the forecast period.

- Electrosurgery devices in neurosurgery are widely used in the removal of meningiomas (a non-cancerous tumor that arises from the membranes surrounding the brain and spinal cord) to the relatively inaccessible meningiomas. According to the ASCO Cancet.net March 2023 update, meningioma makes up 40% of primary brain tumors in the United States. Meningioma is anticipated to be diagnosed in 42,260 individuals in the United States in 2023. Meningioma incidence rates increase with age, and children rarely acquire the disease.

- Furthermore, an increase in strategic activities by the key players is expected to augment the market growth over the forecast period. For instance, in November 2022, NeuroOne Medical Technologies shipped its first commercial order in an agreement with Zimmer Biomet for its Evo sEEG Electrode technology for temporary (less than 30 days) use with recording, monitoring, and stimulation equipment for the recording, monitoring, and stimulation of electrical signals at the subsurface level of the brain. Evo sEEG offers up to 30 days of recording, monitoring, and stimulation of electrical signals at the subsurface level of the brain.

- Therefore, due to the increase in brain-related diseases, rise in product launches, and various strategic activities by the key players, the studied segment is expected to witness significant growth over the forecast period.

North America is Anticipated to Hold a Significant Market Share Over the Forecast Period

- North America is expected to have a significant market share over the forecast period in the electrosurgical devices market owing to the increasing burden of chronic diseases and the geriatric population, increasing demand for minimally invasive procedures, and technological advancements in electrosurgical instruments.

- For instance, according to the June 2022 update by the Canadian Institute for Health Information (CIHI), about 2.4 million Canadians have heart disease. Similarly, as per the 2022 Spotlight on Heart Failure, more than 100,000 Canadians are likely to be

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diagnosed with heart failure each year. The high rate of heart failure will boost the demand for heart surgeries, and thereby, the demand for electrosurgical devices will increase in the studied region, thereby contributing to market growth over the forecast period.

- In addition, the launch of products by the key market players is also expected to boost the market's growth. For instance, in June 2021, Ethicon, part of the Johnson & Johnson Medical Devices Companies, launched the ENSEAL X1 Curved Jaw Tissue Sealer, which offers adequate procedural efficiency and sealing. The device is indicated for colorectal, gynecological, bariatric surgery, and thoracic procedures. These factors have helped North America to become the largest market for electrosurgical devices.
- Also, many key players are focused on various strategic activities to improve their product portfolio and presence in various regions, which is expected to bolster the market growth over the forecast period. For instance, in October 2021, Hologic, Inc. signed a definitive agreement to acquire Bolder Surgical, a privately held, US-based company that provides advanced energy vessel-sealing surgical devices. This acquisition broadened the growing surgical portfolio by adding Bolder's differentiated advanced vessel sealing and dissection tools that are used in laparoscopic procedures. Hence, such strategic activities by the key players are expected to increase the demand for electrosurgical devices in the studied region over the forecast period.
- Thus, due to the increase in chronic diseases, rise in product launches, and various strategic activities by the key players, North America is expected to witness significant growth over the forecast period.

Electrosurgical Devices Industry Overview

The electrosurgical devices market is moderately fragmented. The majority of the electrosurgical devices are being manufactured by the global key players. Market leaders with more funds for research and a better distribution system have established their position in the market. Some of the key players in the market are Applied Medical Resources Corporation, Bovie Medical, Medtronic PLC, Boston Scientific Corporation, and B. Braun SE, among others.

Additional Benefits:

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

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