

Endoscopic Submucosal Dissection/ESD Market by Product (Gastrosopes & Endoscopes, Injection Agent, Tissue Retractor), Indication (Stomach Cancer, Colon Cancer), End User (Hospitals, Specialty Clinics, Ambulatory Surgical Center) - Global Forecast to 2030

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Report description:

The endoscopic submucosal dissection market is projected to reach USD 0.75 billion by 2030 from USD 0.50 billion in 2025, at a CAGR of 8.4% during the forecast period.

Technological advancements in endoscopic submucosal dissection (ESD) tools are significantly enhancing the procedure's clinical utility and safety, which, in turn, is driving market growth. Innovations such as hybrid knives that combine both injection and cutting capabilities have streamlined the dissection process and reduced procedural time. Additionally, traction-assisted systems have improved visualization and access to submucosal layers, making complex dissections more manageable.

<https://www.marketsandmarkets.com/Images/endoscopic-submucosal-dissection-market-Overview.webp>

High-definition and narrow-band imaging (NBI) endoscopes have further enhanced the detection of lesions and assessment of margins, resulting in increased procedural accuracy and better patient outcomes. Companies like Olympus and Fujifilm are heavily investing in platform-specific innovations, integrating energy delivery systems, ergonomic endoscope designs, and AI-based visualization aids.

These developments are reducing the technical barriers traditionally associated with ESD, enabling broader adoption in non-academic and community healthcare settings. As these tools become more intuitive and standardized, they are facilitating the learning process for new practitioners, ultimately making ESD more accessible and preferred for the management of

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early-stage gastrointestinal tumors worldwide.

By product, the gastroscopes & endoscopes segment accounted for the largest share of the market in 2024.

The market for endoscopic submucosal dissection (ESD) is categorized by product type into gastroscopes & endoscopes, knives, injection agents, tissue retractors, grasping clips, and other products. In 2024, the segment for gastroscopes & endoscopes held the largest share of the global ESD market.

Recent advancements in high-definition (HD) and 4K ultra-high-definition (UHD) imaging technologies have transformed ESD procedures by providing superior optical clarity and detailed visualization. Features such as narrow-band imaging (NBI), magnification endoscopy, and 4K scopes significantly enhance the detection of lesions, delineation of margins, and overall procedural accuracy. These imaging enhancements reduce the likelihood of diagnostic errors and allow for more precise dissection, ultimately leading to improved patient outcomes. Consequently, gastroscopes & endoscopes play a vital role in these advancements, which is why they dominate the market share in the ESD sector, driven by their essential contribution to the success of these procedures.

Based on indications, the stomach cancer segment dominated the ESD market in 2024.

Based on indications, the ESD market is divided into three categories: stomach cancer, colon cancer, and esophageal cancer. In 2024, stomach cancer accounted for the largest share of the ESD market. Strong clinical evidence supports ESD as the gold standard for treating mucosal and superficial submucosal gastric tumors. Long-term studies have shown that ESD achieves high rates of en bloc resection, minimal local recurrence, and excellent organ preservation, especially when compared to traditional surgery. These outcomes are particularly significant for early-stage stomach cancers, where a curative approach without major surgery is preferred. Consequently, the stomach cancer segment leads the ESD market, driven by strong clinical validation and high procedural volumes in the management of gastric lesions.

Based on region, the Asia Pacific held the largest market share in 2024.

The Asia Pacific region is projected to hold the largest share of the ESD market during the forecast period. Government-funded screening programs in Japan and South Korea are actively promoting the early detection of gastric and colorectal lesions through endoscopy, which has significantly increased ESD volumes. This region has also been at the forefront of adopting advanced medical technology to enhance patient care and safety.

A breakdown of the primary participants (supply side) for the endoscopic submucosal dissection market referred to in this report is provided below:

- By Company Type: Tier 1 (34%), Tier 2 (38%), and Tier 3 (28%)

- By Designation: C-level Executives (26%), Directors (35%), and Others (39%)

- By Region: North America (17%), Europe (39%), Asia Pacific (28%), Latin America (8%), Middle East & Africa (3%), and GCC Countries (5%)

Prominent players in the endoscopic submucosal dissection market are Olympus Corporation (Japan), FUJIFILM Holdings Corporation (Japan), Medtronic (Ireland), Boston Scientific Corporation (US), and Sumitomo Bakelite Co., Ltd. (Japan).

Research Coverage

The report assesses the endoscopic submucosal dissection market, estimating its size and future growth potential across various segments, including products, indications, end users, and regions. Additionally, the report features a competitive analysis of key players in the market, along with company profiles, product offerings, recent developments, and essential market strategies.

Reasons to Buy the Report

The report will provide valuable data on revenue estimates for the overall endoscopic submucosal dissection market and its subsegments, benefiting both market leaders and new entrants. It will help stakeholders understand the competitive landscape, enabling them to better position their businesses and develop effective go-to-market strategies. Additionally, the report will give stakeholders insights into market trends, including key drivers, challenges, restraints, and opportunities.

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This report provides insights into the following points:

- Analysis of key drivers (increasing use of endoscopy in detection and treatment procedures and rising prevalence of cancer), restraints (dearth of skilled professionals and high overhead cost of ESD procedures with limited reimbursements), opportunities (growing demand for minimally invasive procedures, growing investments in R&D of endoscopy technology, and expected increase in adoption of and preference for ESD procedures in developing countries), and challenges (higher rate of complications and risk of post-operative infections).
- Product Enhancement/Innovation: Comprehensive details about product launches and anticipated trends in the global ESD market.
- Market Development: Thorough knowledge and analysis of the profitable rising markets by product, indication, end user, and region.
- Market Diversification: Comprehensive information about newly launched products and services, expanding markets, current advancements, and investments in the global ESD market.
- Competitive Assessment: Thorough evaluation of the market shares, growth plans, offerings, and capacities of the major competitors in the global ESD market.

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