

MARKET REPORT



Ablation Devices Market by Technology (Thermal (Electrical, Radiation, Radiofrequency, Light, Ultrasound, Microwave, and Hydrothermal Ablation) and Non-Thermal Ablation (Cryoablation and Hydromechanical Ablation)), Application (Cancer, Cardiovascular, Ophthalmology, Gynecology, Urology, and Orthopedics), Function (Automated/Robotic and Conventional Ablation Devices), and Procedure (Aesthetics-Skin

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Ablation is a minimal invasive medical procedure to destroy the abnormal tissues. It is performed with the help of probes that can be inserted through the skin or by using catheters that can be inserted through an artery or energy beams to reach the area that needs to be treated. An imaging technique such as MRI or rotational angiography is used to guide the probes or catheters to the site during ablation.

The world ablation device market is estimated to grow from \$3,047 million in 2015 to \$6,658 million by 2022 at a CAGR of 11.7% from 2016 to 2022. This can be attributed to the increase in demand for minimal invasive surgeries and increase in the prevalence of patients with chronic illnesses. Other factors such as minimal damage and blood loss, and short duration are some of the factors that contribute towards the growth of this market. However, stringent government regulations and unstable reimbursement policies restrain the market growth.

By technology, the ablation devices market is broadly categorized into thermal and non-thermal technologies. Thermal technologies comprise microwave, electrical, light, radiation, ultrasound, radiofrequency, and hydrothermal technologies, and each of these are further subcategorized. Thus, electrical ablation includes electrical ablaters and electronic brachytherapy, while light ablation includes cold and excimer laser. In addition, radiation ablation is sub-categorized into brachytherapy, stereotactic radiotherapy & radiosurgery, stereotactic body radiation, image guided radiation therapy, intensity modulated radiation therapy, and proton beam therapy. While ultrasound ablation is sub-divided into high intensity focused ultrasound (HIFU), magnetic resonance imaging-guided focused ultrasound (MRI-FUS), ultrasonic surgical systems, and shock wave lithotripsy; radiofrequency ablation is sub-divided into temperature controlled, fluid cooled, and catheter manipulation systems. However, the non-thermal technology market comprises cryoablation and hydromechanical ablation, wherein Cryoablation includes tissue contact probe, cryogen spray probe, and epidermal & subcutaneous cryoablation devices.

By applications, the ablation devices market is segmented into cancer, cardiology, ophthalmology, gynecology, urology, orthopedics, and other medical conditions. On the basis of function, the market is divided into automated/robotic and conventional ablation devices. Based on procedure, the market is segmented as aesthetics-skin rejuvenation & tightening, aesthetics-body sculpting, fat reduction, and the reduction in the appearance of cellulite, benign prostatic hyperplasia, transurethral needle ablation, laser- and other energy-based therapies/ holmium laser ablation/enucleation of the prostate, stress urinary incontinence, menorrhagia/endometrial ablation, uterine fibroids, spinal decompression & denervation, varicose veins, atrial fibrillation, tumor ablation, and others. By geography, the ablation devices market is categorized into North America, Europe, Asia-Pacific, and LAMEA.

The growth in competition and continuous technological advancements have led to mergers & acquisitions by major players. For instance, on 26th January 2016, Medtronic PLC acquired Covidien to expand their access and improve their clinical outcomes at lower cost. Moreover, this acquisition has helped Medtronic PLC to compete with Johnson & Johnson. Boston Scientific Corporation acquired Cosman Medical on July 27, 2016 to improve its neuromodulation portfolio and help provide innovative solutions for chronic pain treatment.

KEY MARKET BENEFITS: Quantitative analysis of the current trends and market estimations from 2014 to 2022 is presented to identify potential market opportunities. The report provides an in-depth analysis of the market and total revenue generated during the forecast period. A detailed analysis based on applications and procedures are presented to understand the

type of products in trend or would be in demand to assist in product developments and collaborations. Comprehensive analysis of the market drivers and constraints is provided to identify the prevailing market opportunities. Competitive intelligence highlights the business practices followed by leading market players across various geographies.

KEY MARKET SEGMENTS: The world ablation devices market segmentation is explained below. By Technology Thermal Ablation Electrical Ablators Argon Plasma/Beam Coagulator Irreversible Electroporation Electronic Brachytherapy Radiation Brachytherapy High-Dose-Rate Brachytherapy Pulsed-Dose-Rate Brachytherapy Permanent Seed Brachytherapy Stereotactic Radiotherapy & Radiosurgery Stereotactic Body Radiation Image Guided Radiation Therapy Intensity Modulated Radiation Therapy Proton Beam Therapy Radiofrequency Temperature Controlled Fluid Cooled Catheter Manipulation Systems Light Cold Lasers Excimer Lasers Ultrasound High Intensity Focused Ultrasound (HIFU) Magnetic Resonance Imaging-Guided Focused Ultrasound (MRI-FUS) Ultrasonic Surgical Systems Shock Wave Lithotripsy Microwaves Hydrothermal Non-Thermal Ablation Cryoablation Tissue Contact Probe Cryogen Spray Probe Epidermal and Subcutaneous Cryoablation Devices Hydromechanical Ablation By Application Cancer Cardiovascular Ophthalmology Gynecology Urology Orthopedics Others By Function Automated/Robotic Conventional By Procedure Aesthetics-Skin Rejuvenation and Tightening Aesthetics-Body Sculpting, Fat Reduction, And The Reduction in The Appearance of Cellulite Benign Prostatic Hyperplasia Transurethral Needle Ablation Laser and Other Energy-Based Therapies/Holmium Laser Ablation/Enucleation Of The Prostate Stress Urinary Incontinence Menorrhagia/Endometrial Ablation Uterine Fibroids Spinal Decompression and Denervation Varicose Veins Atrial Fibrillation Tumor Ablation Others By Geography North America U.S. Canada Mexico Europe Germany France UK Italy Spain Russia Rest of Europe Asia-Pacific Japan China Australia India South Korea Taiwan Rest of Asia-Pacific LAMEA Brazil Turkey Venezuela Saudi Arabia Republic of South Africa Rest of LAMEA

COMPANY PROFILES: The key players profiled in this report are listed below: St. Jude Medical, Inc. Medtronic PLC Boston Scientific Corporation AngioDynamics, Inc. AtriCure, Inc. Conmed Corporation Olympus Corporation Smith & Nephew PLC BTG plc Johnson & Johnson Other players in the RPM market include (profiles not included in the report) Accuray Incorporated C.R. Bard, Inc. Varian Medical Systems, Inc. Elekta AB Misonix, Inc. Hologic, Inc. Stryker Corporation EDAP TMS S.A. Japan Lifeline Co., Ltd. Halyard Health, Inc. Merit Medical Systems, Inc. Integra Lifesciences Holdings Corporation Abbott Laboratories Terumo Corporation

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C.R. Bard, Inc.

Varian Medical Systems, Inc.

Elekta AB

Misonix, Inc.

Hologic, Inc.

Stryker Corporation

EDAP TMS S.A.

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