MARKETSTRAT®

Gastrointestinal (GI) Endoscopy Devices Worldwide

Report Highlights

November 2009

MARKETSTRAT®

Report Benefits

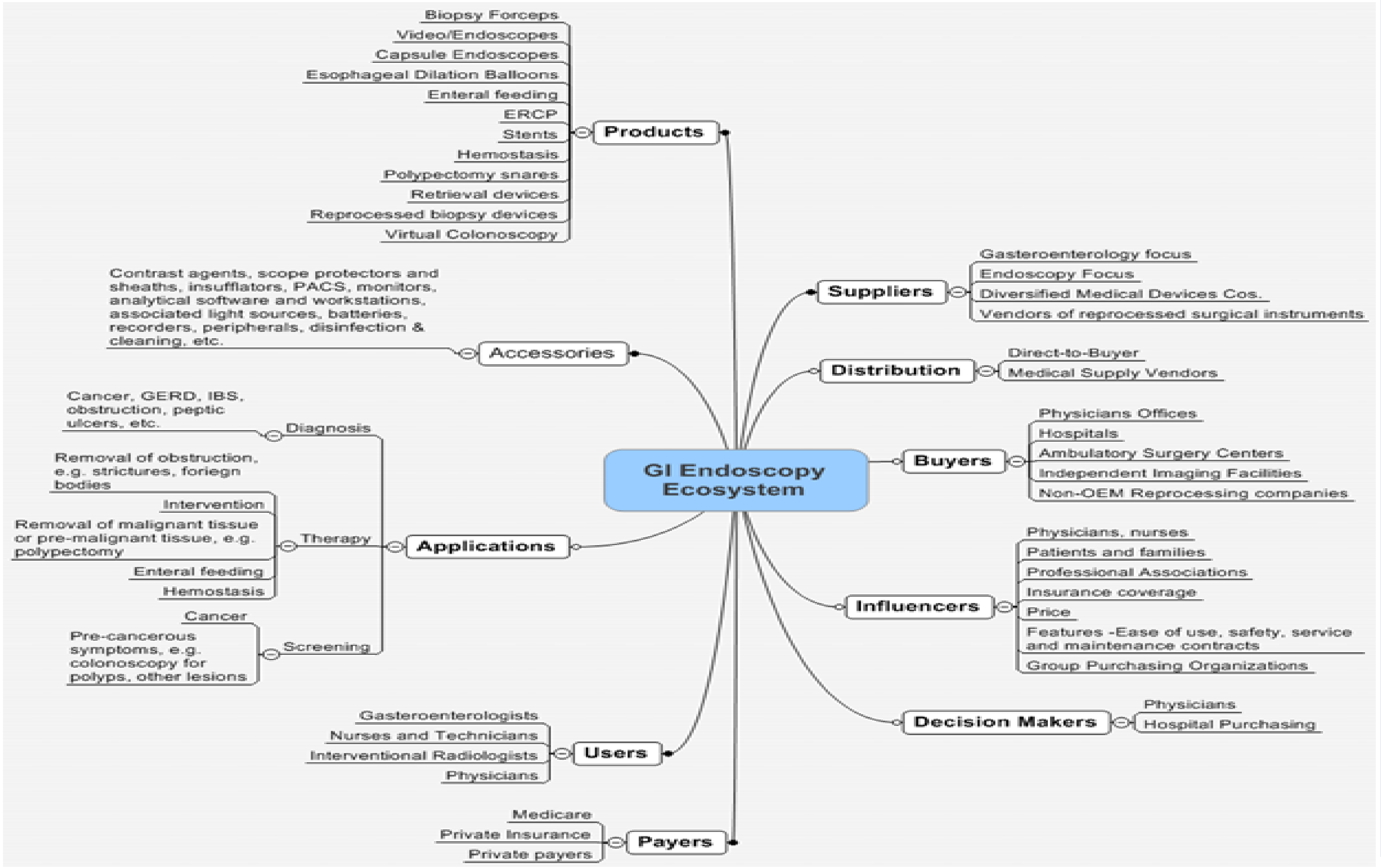
This report can help in:

- Assessing the market for GI Endoscopy Devices worldwide, growth segments, and growth regions.
- Understanding market drivers and restraints, market segmentation, and competitive segmentation.
- Strategic planning and competitive strategy.
- Identifying opportunities for partnerships and alliances.

Key Takeaways

- The world market for GI endoscopy devices is expected to cross $2.9 billion by the end of 2009. A CAGR of over 6 percent is projected for the years 2008-2016.
- The largest market segment is GI Endoscopes/Videoscopes, while the fastest growing segments are Capsule Endoscopy and Reprocessed Biopsy Forceps.
- The growth of Virtual Colonoscopy (CT Colonoscopy) in competition with conventional colonoscopy will be held back due to lack of reimbursement in the US.
- HD endoscopes with narrow band imaging are the latest trend, with the technology being adopted fast by competitors in the GI endoscopy arena.
- Global trend towards reuse of disposable devices will continue against warnings from OEMs, particularly outside the US.
- Market Leaders: Olympus Medical, Boston Scientific, Cook Endoscopy, Fujinon, and Pentax. Given Imaging has become an established key player with its innovative Capsule Endoscopy offerings.

GI Endoscopy Ecosystem



MARKETSTRAT®

Key Market Drivers

- High prevalence of colon cancer in many countries (second largest cause of cancer-related mortality) has led to routine screening, believed to reduce cancer-related deaths by about 60%.
- High worldwide rates of gastrointestinal disorders from GERD and biliary stones to GI tract cancers in people of all ages.
- Rising healthcare costs are also encouraging governments to promote screening programs and preventive surgery.
- Increased demand for minimally-invasive surgical treatment options.
- Demand among GI Endoscopists for latest technology that can provide greater diagnostic sensitivity and specificity as well as providing improved surgical guidance.

MARKETSTRAT®

Sample Market Table

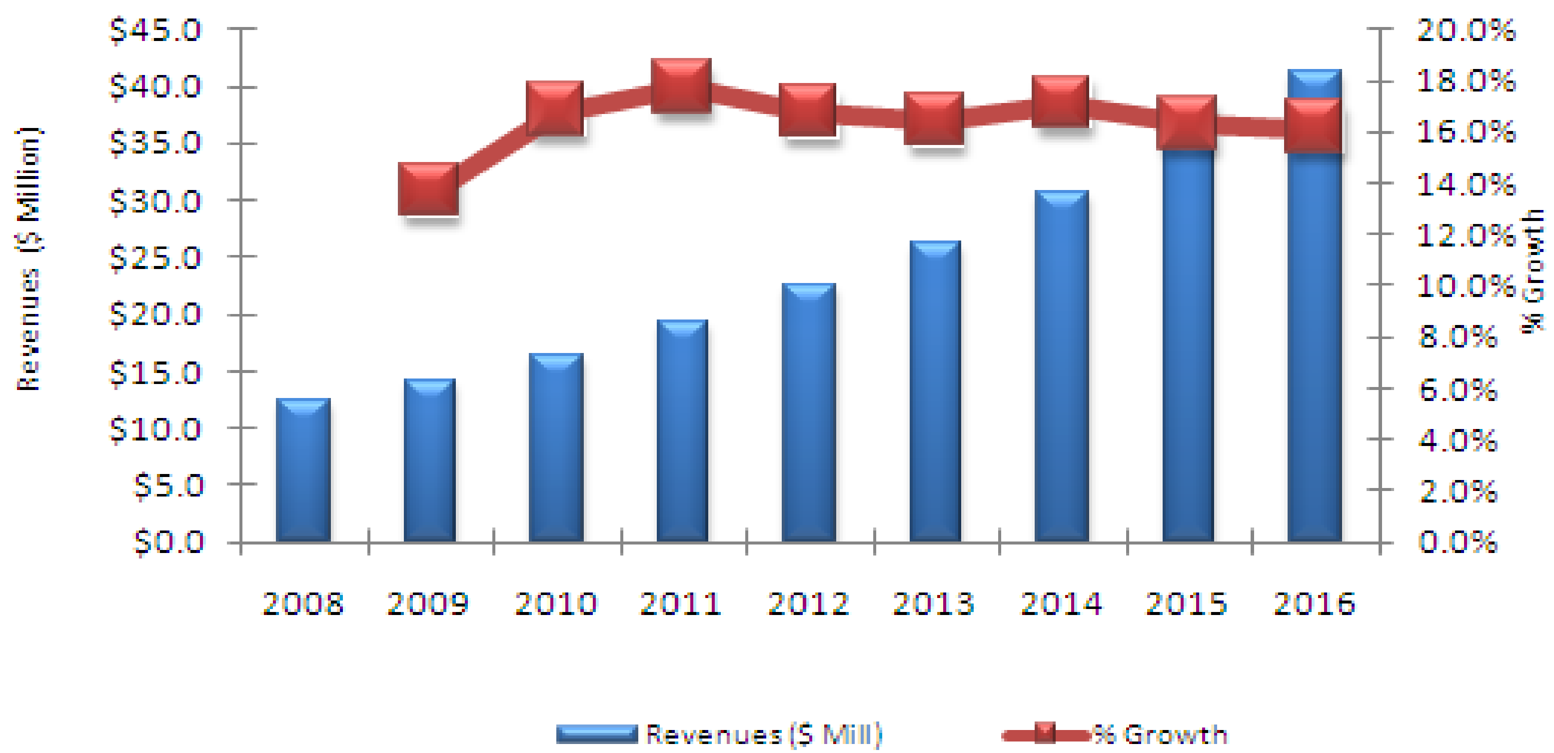
UNITED STATES - HEMOSTASIS DEVICE MARKET BY SEGMENT (2008-2016, $ MILLION)

Segment	2008	2009	2010	2011	2012	2013	2014	2015	2016	CAGR
Argon Plasma Coagulation Probes										
Revenues ($ Mill)										
% Growth										
% of Hemostasis Dev Mkt										
Ligation Bands										
Revenues ($ Mill)										
% Growth										
% of Hemostasis Dev Mkt										
Ligation Clips										
Revenues ($ Mill)										
% Growth										
% of Hemostasis Dev Mkt										
RF Electrosurgery Probes										
Revenues ($ Mill)										
% Growth										
% of Hemostasis Dev Mkt										
Sclerotherapy Needles										
Revenues ($ Mill)										
% Growth										
% of Hemostasis Dev Mkt										
Total ($ Mill)										
Growth Rate										
% of GI Endoscopy Mkt										

Notes:
1. Includes all types of endoscopic GI hemostasis devices
2. Data are at the manufacturer level

Source: Marketstrat™

Sample Chart



MARKETSTRAT®

Report Stats

Regions Covered	US, Europe, Japan, Rest of the World (ROW)
Product/Market Segments	•**GI Endoscopes/ Videoendoscopes** – colonoscopes, duodenoscopes, gastroscopes, enteroscopes, sigmoidoscopes, ultrasound endoscopes •**Biopsy forceps** – disposable, reusable and hot biopsy forceps •**Reprocessed biopsy forceps** •**ERCP devices** – balloon dilators, lithotripters, stone removal devices, cannulae, guidewires, sphincterotomes •**Stents** – metal and plastic, biliary and esophageal •**Enteral Feeding** – pumps and disposables •**Esophageal balloon dilators** – multi-stage and single-stage •**Hemostasis devices** – APC probes, ligator clips, bands, RF probes, sclerotherapy needles •**Polypectomy snares** •**Retrieval devices –** disposable and reusable •**Capsule Endoscopy –** capsules, workstations, data recorders •**Virtual Colonoscopy**
Companies Profiled	~ 100 companies worldwide
Market Estimates/ Forecasts	In US dollars for 2008-2016
Report Code	123-09
Price	$2995 (single-user license); $5990 (corporate license)
No. of Pages	Pages 526; 123 Tables and 120 Graphs
Publication Date	November 2009

About Us

Marketstrat® assists companies with market, technology, and best practice strategies & intelligence, through a unique combination of published reports, solutions, and services.

Our goal is to be your source for consistent, easy to understand, and actionable research.

MARKETSTRAT®

Contact Information

- Phone: 925-263-4455
- Fax: 925-263-4456
- Email: info@marketstrat.com
- Web: http://www.marketstrat.com