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2 Introduction

GlobalData’s Medical Equipment Market Reports are the ideal guide for anyone wishing to understand their market better in terms of revenues, distribution share and company share.

2.1 What is This Report About?

The North America endoscopy devices report provides an overview of the following information:

1. Comprehensive data related to the market revenue, company share and distribution share.
2. Global corporate-level profiles of key companies operating in the endoscopy devices market in North America, which includes a brief overview of the company. The selection of the companies is based on their operational presence in North America; it includes key multinationals as well as key local players.
3. A list of key products under development by different companies. The selection of this list is based on the territory in which these products are being clinically investigated.

Note: “North America;” includes the following countries – United States and Canada.
3 Endoscopy Devices in North America

3.1 Endoscopy Devices Cross Country Comparison, Revenue ($m), USD Constant, 2005-2019

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<tr>
<th>Country Name</th>
<th>2005</th>
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Source: GlobalData

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Source: GlobalData
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<th>2019</th>
<th>CAGR 05-12</th>
<th>CAGR 12-19</th>
<th>CAGR 05-19</th>
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Source: GlobalData
10 Appendix

The data and analysis within this report is driven by Medical eTrack

Medical eTrack gives you the key information to drive sales, investment and deal making activity in your business. It includes the following information:

- 15,000+ Market size data tables across more than 780 medical equipment segments and 39 countries with historic data from 2005 forecast to 2019
- 6,000+ Primary expert interviews conducted per annum for ensuring data and report quality
- 1,100+ Conferences on medical equipment covered
- 1,000+ Industry leading reports per annum covering growing sectors, market trends, investment opportunities and competitive landscape
- 600+ Analysis reports covering market and pipeline product analysis reports by indication, medical equipment trends and issue reports and investment and M&A trend reports worth over $3 Million
- 50,000+ Medical equipment companies profiled
- 2,000+ Private, emerging and technology start-up company profiles
- 4,000+ Medical equipment manufacturers in China and India
- 2,000+ Medical equipment companies in Japan
- 825+ Companies with revenue splits and market shares by category
- 1,100+ Quarterly and annual medical equipment company financials
- 700+ Medical equipment company SWOT’s
- 11,700+ Pipeline product profiles
- 14,000+ Marketed product profiles
- 16,900+ Clinical trials
- 17,000+ Trial investigators
- 18,000+ New product patents
- 3,700+ Companies with products in development
- 21,500+ Deals in the medical equipment industry
- 1,300+ Surgical and diagnostic procedures by therapy area
- 50+ Key healthcare indicators by country
  - For more information or to receive a free demo of the service, please visit
  
10.1 Definitions of Markets Covered in the Report

10.1.1 Endoscopy Devices

Endoscopy devices are minimally invasive diagnostic medical devices used to examine the interior surfaces of the body. Flexible endoscopes, rigid endoscopes, capsule endoscopes, endoscopic reprocessors, endoscopy fluid management systems, endoscopy visualization systems and other endoscopy aids have been tracked under this market.

10.1.1.1 Capsule Endoscope System

Capsule endoscopy is used exclusively for diagnosis of ailments of the gastrointestinal tract as it enables visualization of complete gastrointestinal tract. Capsule endoscopy workstation and capsule endoscopes are tracked under this category.

10.1.1.2 Endoscopic Instruments

Endoscopic instruments are the devices used in endoscopic procedures to provide surgeons precise access into the surgical site enabling them to collect tissue samples from the body and perform endoscopic procedures such as suture management. Endoscopic instruments include biopsy forceps, polypectomy snares and fine aspiration needles.

10.1.1.3 Endoscopic Reprocessors

Endoscopic reprocessors are reprocessing systems designed to wash and disinfect a variety of endoscopes following manual precleaning. They rely upon high pressure, flow rates of liquid chemical germicides (LCG) through the endoscope channels and continuous bathing of the exterior of the instrument. Some consume and dispose of limited amounts of LCG per endoscope cycle, whereas others use a reservoir of LCG that is reused over many cycles. Both types are tracked under this category. Consumable items used together with endoscopic reprocessors are not tracked here. One single endoscopic reprocessor is considered as one unit.

10.1.1.4 Endoscopy Fluid Management Systems

Endoscopy fluid management systems are used for the irrigation and/or aspiration of fluids into or from a surgical work site during an endoscopic procedure. The systems are used during minimally invasive surgery to perform a variety of irrigation/aspiration functions such as tissue lavage, joint distension or uterine distension. These systems include electrically driven pump systems and vacuum systems. The endoscopy fluid management system market does not include fluid management systems used in arthroscopy procedures. One single endoscopy fluid management system is considered as one unit.

10.1.1.5 Endoscopy Visualization Systems

Endoscopy visualization systems are devices that aid in visualization and interpretation of the endoscopic images. Typically a visualization system includes endoscopic cameras, video endoscopes, light sources, monitor and display systems, printers, suction pump and other accessories. Various video endoscopes which come together with a visualization system are not included in this category. One unit consists of one visualization system.
10.1.1.6 **Flexible Endoscopes**

Flexible endoscopes are optical fibre based flexible tubes used for visualization of the internal cavities of the human body. These optical fibres exploit the phenomenon of total internal reflection to transmit the image from the body cavities either directly to an operator's eye or to the monitor/display system. Fibroscopes and flexible videoscopes have been tracked under this category.

10.1.1.7 **Rigid Endoscopes**

Rigid endoscopes are solid metal tubes with a series of lenses mounted around one end of the tube. Fibre optics arranged on the outside of the lens housing is used to deliver light along the length of the endoscope. These endoscopes are not flexible, but generate high resolution images. Traditional rigid endoscopes and rigid video endoscopes are tracked under this category.

Note: 1). Value, distribution and company shares figures reflect annual gross sales of endoscopy devices in local currency converted to $ at constant rate. The annual growth (year on year growth) and compounded annual growth rate (CAGR) in tables is rounded off to one decimal place.

2). Company share data represents market share (in revenues and as percentage to total market) of companies in market categories and geographies tracked. The data is rounded off to the nearest decimal places.
10.2 Research Methodology

GlobalData’s dedicated research and analysis teams consists of qualified professionals with experience in marketing, market research, consulting background in the medical devices industry and advanced statistical expertise.

GlobalData adheres to the codes of practice of the Market Research Society (www.mrs.org.uk) and the Strategic and Competitive Intelligence Professionals (www.scip.org).

All GlobalData databases are continuously updated and revised. The following research methodology is followed for all databases and reports.

10.3 Secondary Research

The research process begins with exhaustive secondary research on internal and external sources being carried out to source qualitative and quantitative information relating to each market.

The secondary research sources that are typically referred to include, but are not limited to:

- Company websites, annual reports, financial reports, broker reports, investor presentations and SEC filings;
- Industry trade journals, scientific journals and other technical literature;
- Internal and external proprietary databases;
- Relevant patent and regulatory databases;
- National government documents, statistical databases and market reports;
- Procedure registries; and
- News articles, press releases and web-casts specific to the companies operating in the market.

10.4 Primary Research

GlobalData conducts thousands of interviews a year with industry participants and commentators in order to validate its data and analysis. A typical research interview fulfills the following functions:

- It provides first-hand information on market size, market trends, growth trends, competitive landscape and future outlook;
- Helps in validating and strengthening the secondary research findings; and
- Further develops the analysis team’s expertise and market understanding.

Primary research involves e-mail interactions and telephonic interviews for each market, category, segment and sub-segment across geographies.

The participants who typically take part in such a process include, but are not limited to:

- Industry participants: CEOs, VPs, marketing/product managers, market intelligence managers and national sales managers;
Appendix

- Hospital stores, laboratories, pharmacies, distributors and paramedics;
- Outside experts: investment bankers, valuation experts, research analysts specializing in specific medical equipment markets; and
- Key opinion leaders: physicians and surgeons specializing in different therapeutic areas corresponding to different kinds of medical equipment.

10.5 Models

Where no hard data is available, GlobalData uses modeling and estimates in order to produce comprehensive data sets. The following rigorous methodology is adopted:

Available hard data is cross-referenced with the following data types to produce estimates:
- Demographic data on population segments;
- Macro-economic indicators such as GDP, inflation rate;
- Healthcare indicators such as health expenditure, physician base, healthcare infrastructure and facilities; and
- Selected epidemiological and procedure statistics.
- Data is then cross-checked by the expert panel. All data and assumptions related to modeling are stored and are made available to clients on request.

10.6 Forecasts

GlobalData uses proprietary forecast models. The following four factors are utilized in the forecast models:
- Historic growth rates;
- Macro-indicators such as population trends and healthcare spending;
- Forecast epidemiological data; and
- Qualitative trend information and assumptions.
The data is then cross-checked by the expert panel.

10.7 Expert Panels

GlobalData uses a panel of experts to cross-verify its databases and forecasts.

GlobalData’s expert panel comprises marketing managers, product specialists, international sales managers from medical device companies; academics from research universities, KOLs from hospitals, consultants from venture capital funds and distributors/suppliers of medical equipment and supplies etc.

Historic data and forecasts are relayed to GlobalData’s expert panel for feedback and adjusted in accordance with their feedback.
10.8 GlobalData Consulting

We hope that the data and analysis in this brief will help you make informed and imaginative business decisions. If you have further requirements, GlobalData’s consulting team may be able to help you. GlobalData offers tailor-made analytical and advisory services to drive your key strategic decisions.

10.9 Currency Conversion

The Currency Conversion rate is based on 2012 average rate 1 USD =

- Canada 1.000 CAD.

10.10 Disclaimer

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