EU5 Bariatric Surgery Procedures Outlook to 2020

Reference Code: **GDMECR0089PDB**

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GlobalData»

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2   Introduction

Medical Equipment Procedure Reports are the ideal guide for anyone wishing to understand the market better in terms of number of surgeries performed.

2.1   What Is This Report About?

This report provides Bariatric Surgery Procedures data related to the region

2.2   Bariatric Surgery Procedures Segmentation

- **Bariatric Surgery Procedures includes segments such as**
    1   Gastric Bypass Procedures
    2   Sleeve Gastrectomy Procedures
    3   Gastric Banding Procedures

2.3   Definitions of Procedures Covered in the Report

Bariatric Surgery Procedures

Bariatric surgery is an operation on the stomach and/or intestines that helps patients with obesity to lose weight. It is recommended for patients with Body Mass Index (BMI) ≥ 40 or BMI ≥ 35 with co morbidities such as type 2 diabetes, heart disease, or severe sleep apnea.

Gastric Banding Procedures

In Gastric Banding Procedure, the food intake is reduced by placing a small bracelet-like silicone band around the top of the stomach to restrict the size of the opening from the throat to the stomach.

Gastric Bypass Procedures

In Gastric Bypass Procedure, the stomach is stapled into 2 pieces, one small and one large. The small piece becomes the "new" stomach pouch. The pouch is 5% of the size of the old stomach, therefore holds much less food.

Sleeve Gastrectomy Procedures

In Sleeve Gastrectomy, large part of the stomach is removed to create a more tubular "gastric sleeve". The smaller stomach sleeve remains linked to a very short part of the duodenum, which is then directly linked to a lower part of the small intestine. This surgery leaves a small part of the duodenum available to absorb food and some vitamins and minerals.

3 Bariatric Surgery Procedures, EU5

3.1 *Bariatric Surgery Procedures, EU5, 2005-2020*

Figure 1: Bariatric Surgery Procedures, EU5, 2005-2020
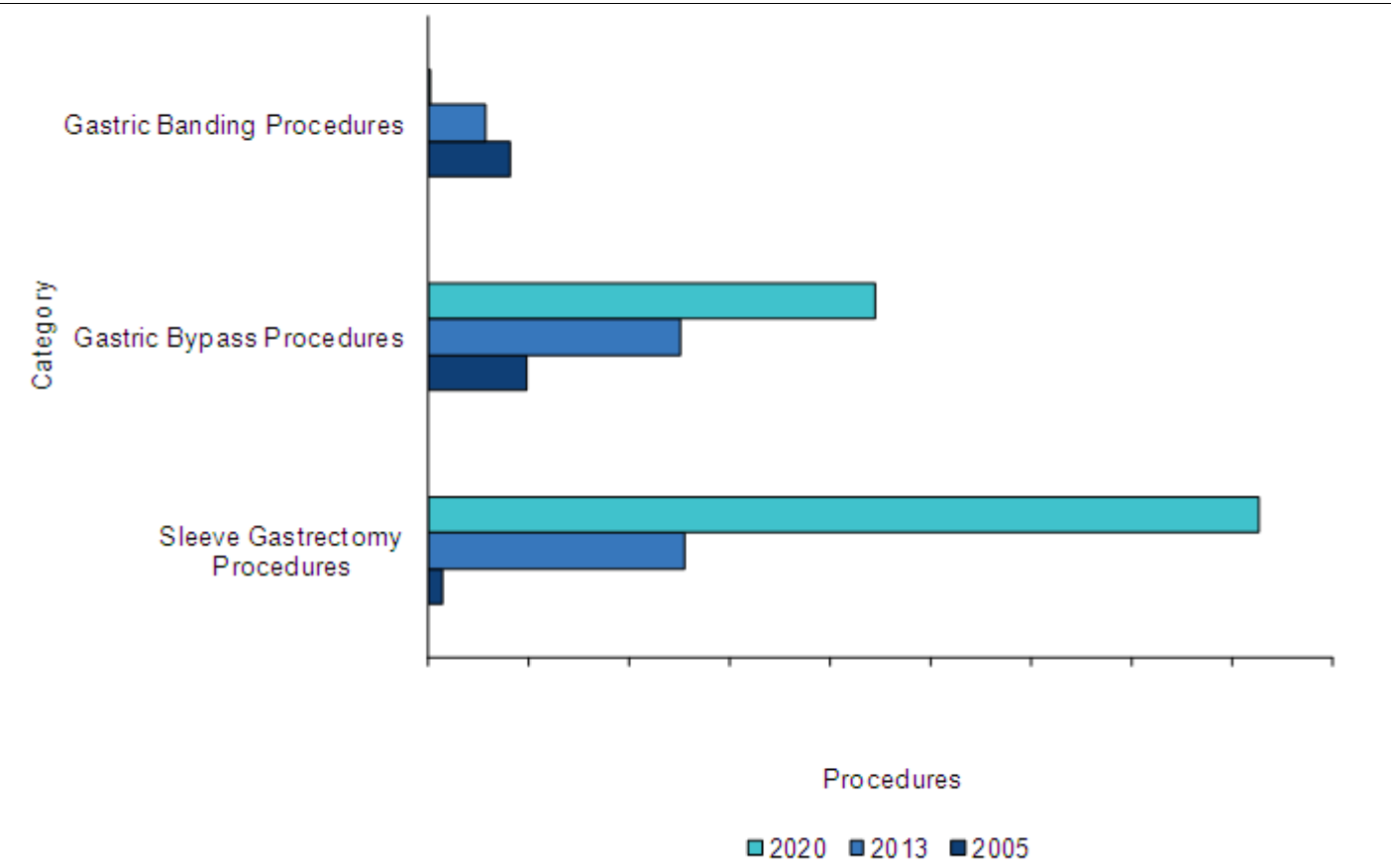
Source: GlobalData

Table 1: Bariatric Surgery Procedures, EU5, 2005-2020						
Category Name	2005	2013	2020	CAGR 05-13	CAGR 13-20	CAGR 05-20
Source: GlobalData						

3.2 Bariatric Surgery Procedures, EU5, 2005-2013

Figure 2: Bariatric Surgery Procedures, EU5, Historic, 2005-2013
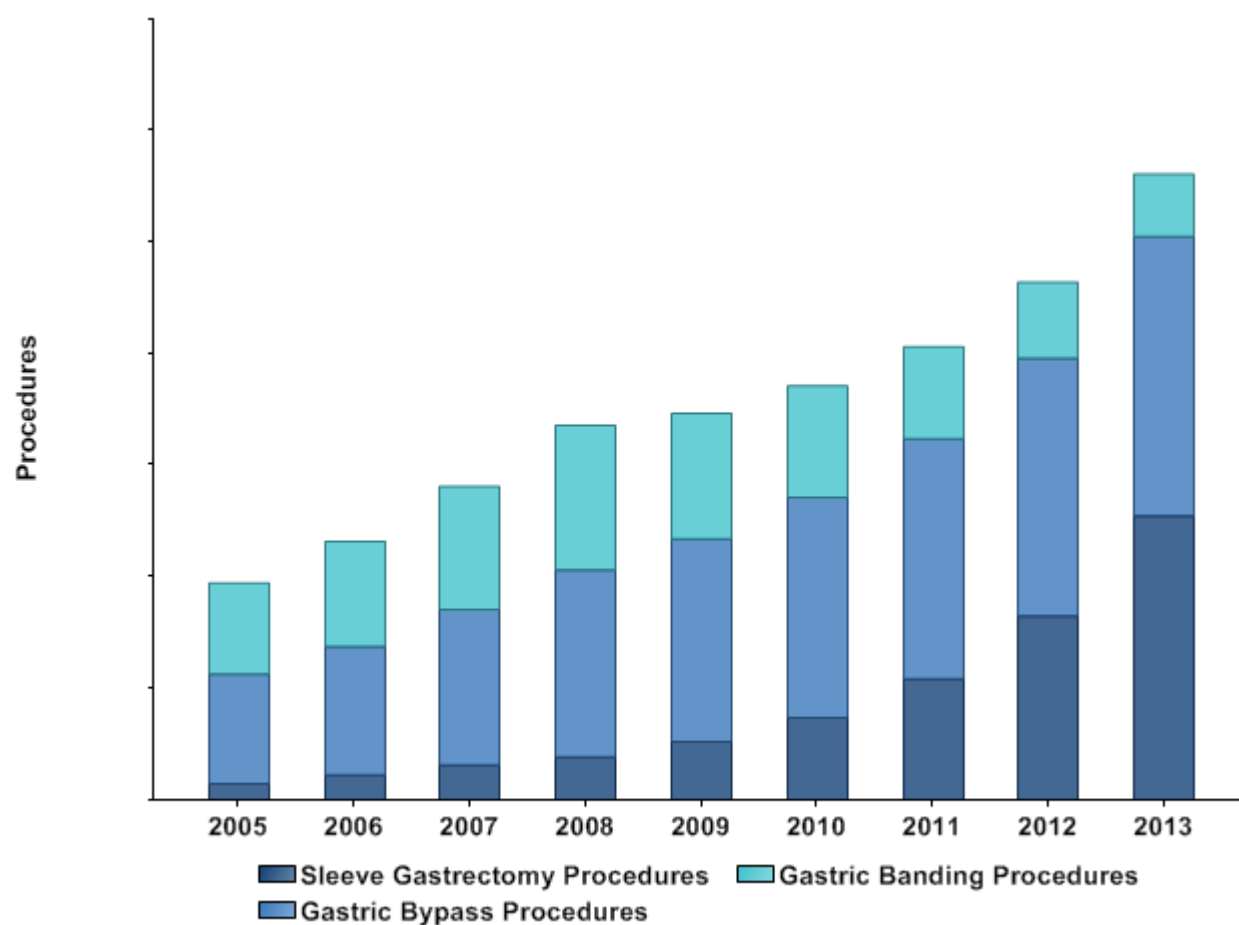
Source: GlobalData

Table 2: Bariatric Surgery Procedures, EU5, Historic, 2005-2013

Category	2005	2006	2007	2008	2009	2010	2011	2012	2013	CAGR 05-13
Source: GlobalData										

9   Appendix

The data and analysis within this report are driven by Medical eTrack. Medical eTrack gives you the key information required to drive sales, investment and deal-making activity in your business. It includes the following:

- 15,000+ data tables showing market size across more than 780 medical equipment segments and 15 countries, from 2005 and forecast to 2020

- 6,000+ primary expert interviews, conducted annually to ensure data and report quality

- 1,100+ medical equipment conference reports

- 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, by indication; medical equipment trends and issues, and investment and M&A trends worth over $3m

- 50,000+ medical equipment company profiles

- 2,000+ private, emerging and technology start-up company profiles

- 4,000+ company profiles of medical equipment manufacturers in China and India

- 2,000+ company profiles of medical equipment manufacturers in Japan

- 825+ companies' revenue splits and market shares

- 1,100+ quarterly and annual medical equipment company financials

- 700+ medical equipment company SWOTs

- 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+ reports on companies with products in development

- 21,500+ reports on 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 demonstration of the service, please visit:

http://www.medicaletrack.com/ContactUs.aspx?Id=RequestDemo

9.1 Research Methodology

GlobalData's dedicated research and analysis teams consist of experienced professionals with advanced statistical expertise and marketing, market research and consulting backgrounds in the medical devices industry.

GlobalData adheres to the codes of practice of the European Pharmaceutical Marketing Research Association (http://www.ephmra.org/).

All GlobalData databases are continuously updated and revised.

9.1.1 Coverage

The objective of updating GlobalData's coverage is to ensure that it represents the most up-to-date vision of the industry possible.

Changes to the industry taxonomy are built on the basis of extensive research of company, association and competitor sources.

Company coverage is based on three key factors: revenue; product and media attention; and innovation and market potential.

The estimated revenue of all major companies, both private and public, are gathered and used to prioritize coverage.

GlobalData aims to cover all major news events and deals in the medical devices industry, updated on a daily basis. The coverage is further streamlined and strengthened with additional input from GlobalData's expert panel.

9.1.2 Secondary Research

The research process begins with extensive secondary research using internal and external sources to gather all relevant data and information pertaining to a particular market model for a particular country. 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

- Association and healthcare organization websites

- PubMed, Medscape and other relevant services which compile extensive reviews of clinical literature

- Internal proprietary databases

- Relevant patent and regulatory databases

- National government documents, statistical databases and market reports

- Procedure registries

- News articles, press releases and web-casts specific to the companies operating in the market

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

- Provides first-hand information on market size, market trends, growth trends, competitive landscape and future outlook

- Helps to validate and strengthen secondary research findings

- Further develops the analysis team's expertise and market understanding

Primary research involves email correspondence, telephone interviews and face-to-face interviews for each market, category, segment and sub-segment across a range of 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

- Distributors, paramedics and representatives from hospital stores, laboratories and pharmacies

- Outside experts: investment bankers, valuation experts and research analysts that specialize in specific medical equipment markets

- Key opinion leaders: physicians and surgeons that specialize in the therapeutic areas in which the medical device is used

The market data was validated based on the inputs from 4,957 primary research participants. The primary research participants included stakeholders from demand side such as General surgeons, Gastroenterologists, Gynecologists and Obstetricians, ENT Surgeons, Bariatric Specialists and Oncologists as well as participants from the supply side such as the Marketing Managers, Sales Managers and Product Managers of companies manufacturing/marketing General Surgery devices.

Table 14: Total Number of Primary Research Participants, General Surgery Market, by Country	
Country	**Total Number of Primary Research Participants**
United States	628
Canada	455
Germany	391
Spain	381
United Kingdom	366
Brazil	340
Italy	337
India	320
Australia	306
France	295
South Korea	249
Russia	247
Mexico	234
Japan	228
China	180
Total	**4,957**
Source: GlobalData	

9.1.4   Market Modeling and Forecasting

GlobalData uses an epidemiology-based treatment flow model and capital equipment-based model to estimate and forecast market size.

Epidemiology-Based Market Model and Forecasting

The epidemiology-based forecasting model uses epidemiology data gathered from research publications and primary interviews with physicians to establish the target patient population and treatment flow pattern for individual diseases and therapies. The data covers prevalence, incidence, diseased population, diagnosed population, and treatment population.

- The market forecast begins with the general population, the size of which varies depending on the indication.

- Prevalence is the percentage of the total population that suffers from a particular disease or condition.

- Incidence is the number of new cases of a condition, symptom, death or injury that develop during a specific time period, such as one year.

- The diseased population is the population suffering from a particular disease or condition.

- The diagnosed population is the population that has been diagnosed with a particular disease or condition, expressed as a percentage of the prevalence population.

- The treatment population is the percentage of the population that has been diagnosed with a particular disease or condition.

- Device uptake is the percentage of the treatment population using a particular device, determined based on the primary responses and the information available in secondary sources.

The epidemiology-based forecasting model for a medical device is used to:

- Determine the patient segment using a particular device or procedure

- Determine the frequency of usage of a particular device depending on the patient type, which further helps to determine the absolute unit sales of a device in a year

The market for any medical device is directly proportional to the volume of units sold and the price per unit.

Market size = volumes of units sold X ASP (Average Selling Price)

The volume of units sold is calculated from the number of patients using or that has been implanted with the device. Data on treatment rate, diagnosis and surgical treatment rate, if unavailable from research publications, is gathered from interviews with physicians and used to estimate the patient volume for the disease under consideration.

The ASP of a device is mostly gathered from primary and secondary sources. ASP is the price at which a device is available in a target country to an end-user. For capital equipment, the end-user is typically considered to be the healthcare setting. For implants and consumables purchased by patients, the end-user is the patient.

Factors such as company share, reimbursement, company type (local/domestic or multinational) are taken into consideration during ASP analysis, which uses the following sources:

- Company websites

- Annual reports/industry reports

- Press releases

Epidemiology-Based Forecasting Model

Figure 14: GlobalData Epidemiology-Based Forecasting Model

Source: GlobalData
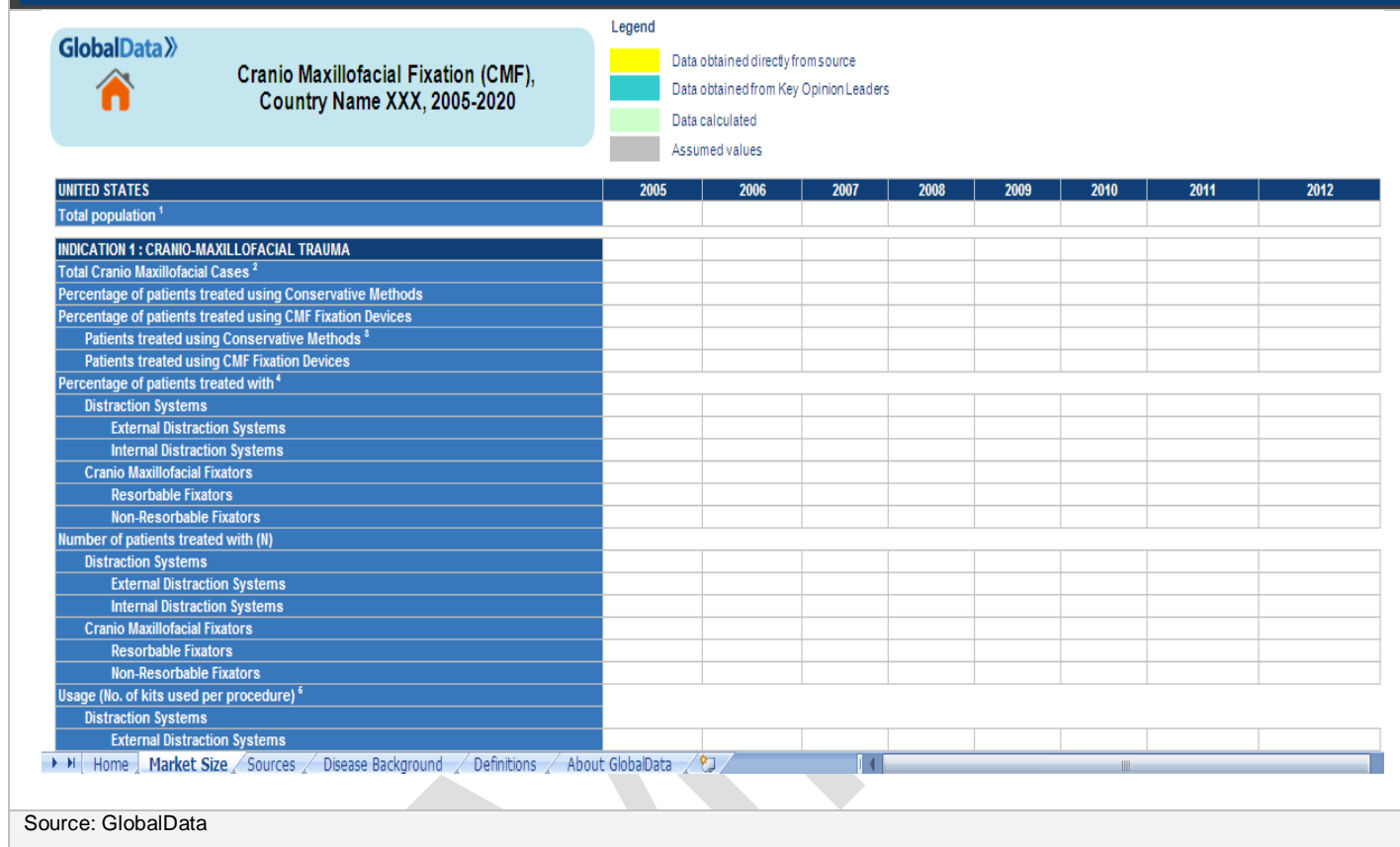
Capital Equipment-Based Market Model and Forecasting

The capital equipment-based forecasting model is based on the installed base, replacements and new sales of a specific type of capital equipment in healthcare facilities such as hospitals, clinics and diagnostic centers. The installed base is calculated from the average number of units per facility. Sales for a particular year are arrived at by calculating the number of replacement units and new units (additional and first-time purchases). Secondary sources and interviews with supply-side participants and key opinion leaders from healthcare facilities are used to arrive at installed base and unit sales for a particular year. The factors typically affecting the forecast growth rates are:

- Growth in the number of healthcare facilities

- Healthcare spending and government programs and initiatives

- Migration from low-end equipment to high-end equipment

- Growth in the diagnosed population and treatment population

Capital Equipment-Based Forecasting Model

Figure 15:   GlobalData Capital Equipment-Based Forecasting Model

Source: GlobalData
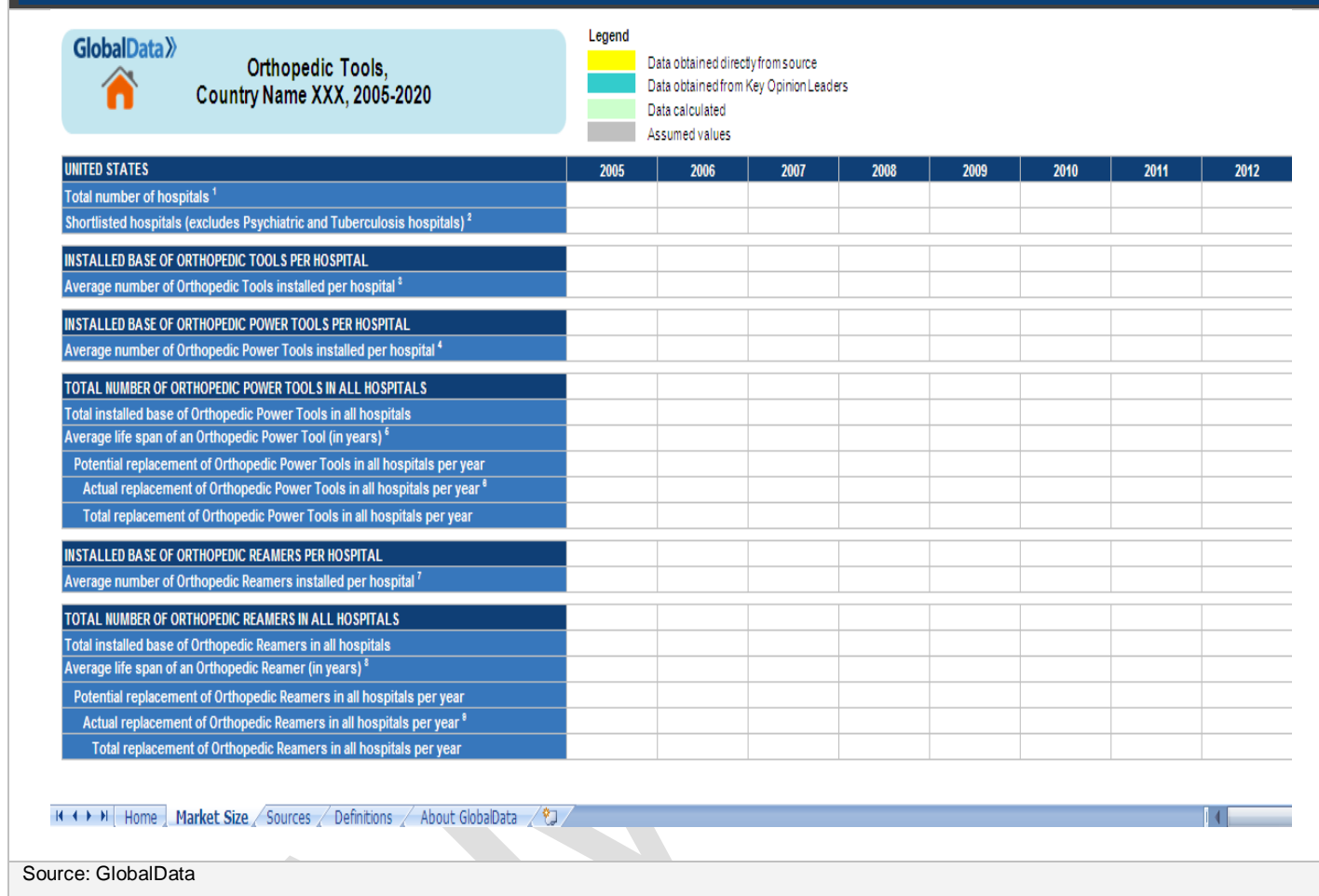
9.1.5   Company Share Analysis

Company shares are calculated by analyzing a company's sales in a particular market. In the case of public companies, annual reports and regulatory filings, investor presentations, earnings call transcripts and broker reports are used to determine a company's revenue in a particular market and in a particular geography.

In the case of the private companies, company share data is gathered mostly from primary interviews and secondary sources. Company share analysis is based on primary interviews with:

- Supply side (manufacturers)

- Procurement side

- Distributors

- Hospital purchasing groups

- Demand side (surgeons/specialists)

The benefits of this approach are:

- High number of respondents to validate and from which to derive accurate company shares

- Broad view from the supply, demand, and procurement side

- Prevents biased opinions being reproduced

- Demand-side interviews with key opinion leaders help to understand their preferences for the devices of specific companies, strengthening company share estimates

Primary Interviews by Participant Type

Figure 16: Primary Interviews by Participant Type (%)
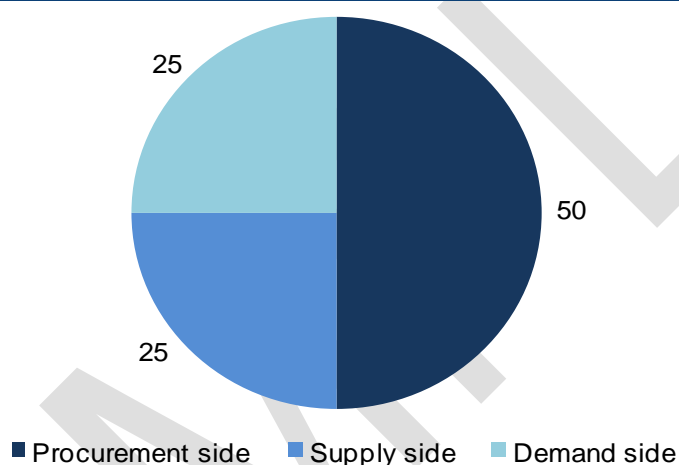
The final company share data is based on input from the supply side, the procurement side and the demand side, as well as secondary sources. Please note that market share for companies that are included under the 'Others' category is not tracked on an individual basis.

9.1.6 Distribution Share Analysis

Distribution share information is gathered using a combination of secondary and primary research. It is supported by primary interviews because the availability of secondary data is limited in most cases.

9.2 Expert Panel

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, key opinion leaders from hospitals, consultants from venture capital funds and distributors/suppliers of medical equipment and supplies.

Historic data and forecasts are relayed to GlobalData's expert panel for feedback and adjusted accordingly.

9.3   GlobalData Consulting

We hope that the data and analysis in this brief will help you to 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

9.4   Disclaimer

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