Nephrectomy Market Research Report - Global Forecast till 2023

Market Scenario

Nephrectomy is a surgical procedure for the removal of a kidney. The procedure is performed to treat various kidney problems such as kidney cancer, and kidney diseases such as symptomatic hydronephrosis, chronic infection, and polycystic kidney disease. It is also done during kidney transplant. There are various types of nephrectomy procedures such as laparoscopic surgery, robot-assisted laparoscopic surgery, open surgery, radical nephrectomy, and partial nephrectomy.

The global market for nephrectomy is driven by increasing prevalence of kidney cancer and chronic kidney diseases and increasing number of laparoscopic procedures. Additionally, advancement in laparoscopic nephrectomy also fuels the market growth. Furthermore, favorable reimbursement policies, increased application and significant investments in the development of new technologies for the treatment of diseases will fuel the market growth during the forecast period. Moreover, increasing geriatric population with chronic diseases such as diabetes and obesity will fuel the market growth.

As per the National Institute of Diabetes and Digestive and Kidney Diseases (NIDDK), kidney disease is often referred to as a “silent disease” as there are no symptoms in its early stages and can go undetected. Chronic kidney disease (CKD) is a global health burden risk factor for cardiovascular disease (CVD). High blood pressure and diabetes are the main causes of CKD. High economic cost to health systems and decreased productivity are major drawbacks of kidney diseases. NIDDK also stated that the overall prevalence of Chronic Kidney Disease (CKD) in the general population is approximately 14%. It also stated that in 2013, Medicare spending for patients with CKD aged 65 and older exceeded USD 50 billion which accounted for 20% of all Medicare spending in this age group. More than 70% of Medicare spending for CKD patients aged 65 and older was incurred by those who also had diabetes, congestive heart failure, or both.

The global nephrectomy market is expected to grow at a CAGR of 5.8% during the forecast period 2017-2023.

Research Methodology
Sources: Annual reports, Press release, White paper, and Company presentation

**Intended Audience**
- Pharmaceutical and Biotechnological Companies
- Research and Development (R&D) Companies
- Ambulatory Care Centers
- Academic Institutes and Universities
- Market Research and Consulting Service Providers
- Potential Investors

**Segmentations**

The global nephrectomy market is segmented on the basis of procedure, products, indication and end user.

On the basis of the procedure, it is segmented into laparoscopic surgery, robot-assisted laparoscopic surgery, open surgery, radical nephrectomy and partial nephrectomy.

On the basis of the products, it is segmented into nephrectomy surgical kits, vascular clamps, suturing needles and others.

On the basis of the indication, it is segmented into kidney cancer and kidney disease.

Kidney cancer is further segmented into renal cell cancer, Wilms' tumour, transitional cell cancer and others. Kidney disease is further segmented into symptomatic hydronephrosis, chronic infection, polycystic kidney disease, hypertension or renal calculus and others.

Based on the end user, it is segmented into hospitals & clinics, nephrology center, research institutes, and others.

**Key Players**

Key players in the market are Karl Storz GmbH & Co.KG (Germany), Olympus Corporation (Japan), Medtronic plc (Ireland), B. Braun Melsungen AG (Germany), Stryker Corporation (U.S.), Richard Wolf GMBH (Germany), Ethicon, Inc. (U.S.), Smith & Nephew PLC (U.K), Cook Medical Incorporated (U.S.), and ConMed Corporation (U.S.), XCELLANCE Medical Technologies (India), and others.

Figure: Global Nephrectomy Market, By Region Market Share, 2016 (%)

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**Figure Description:**
- **Primary Research:** Includes interviews and focus groups with key opinion leaders and key decision makers.
- **Secondary Research:** Includes analysis of primary research, secondary research, and industry reports.
- **Data Analysis:** Involves statistical analysis, financial modeling, and market trend analysis.
- **Market Assessment:** Evaluates market size, growth, and competitive landscape.

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**Diagram Details:**
- **Primary Research:** Focus on qualitative and quantitative research methods.
- **Secondary Research:** Emphasis on market size and growth:
  - **Primary Data:** Surveys, interviews, and focus groups.
  - **Secondary Data:** Industry reports, government publications.
- **Data Analysis:** Techniques include SWOT analysis, PESTLE analysis, and Porter's Five Forces.
- **Market Assessment:** Includes market segmentation and SWOT analysis.

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**Figure:** Global Nephrectomy Market, By Region Market Share, 2016 (%)

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**Graph Details:**
- **x-axis:** Regions (North America, Europe, Asia-Pacific, Rest of the World).
- **y-axis:** Market Share (%)
Regional Analysis

The Americas nephrectomy market is expected to show extensive growth owing to increasing of patient population with kidney cancer, and technological advancement in the healthcare also accelerates the market growth. North America is the largest market whose growth is driven by increasing healthcare spending, and increasing government support for research & development will boost the market growth. Furthermore, extensive use of laparoscopic instruments and concentration of key players influence in the market growth.

Europe holds the second largest share of the global market with Germany, France and U.K exhibiting progressive growth. The increasing demand for technological advanced laparoscopic devices and increasing investment in healthcare industry for development of diagnostic and treatment services in European region will fuel the growth of the market. Additionally, rising awareness about renal failure and kidney cancer will boost the European market.

Asia Pacific is the fastest growing nephrectomy market. Japan holds a major share of the regional market due to the rapid development of medical device industry and huge healthcare spending. The market in the emerging economies such as India and China is driven by rising demand for laparoscopic surgeries and huge patient population with chronic kidney diseases. Rapidly developing economy, increasing healthcare expenditure and government initiatives for research & development will drive the market. Furthermore, increasing investment by biotechnology and pharmaceutical industries in research & development and rising need for the better treatment methods drive the growth of the market.

The Middle East & Africa hold the least share of the global market due to limited availability of medical facilities. The UAE, Saudi Arabia, and Kuwait are expected to drive the Middle East & African market whereas, the African region is expected to witness a moderate growth.
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