

## Market insights summary

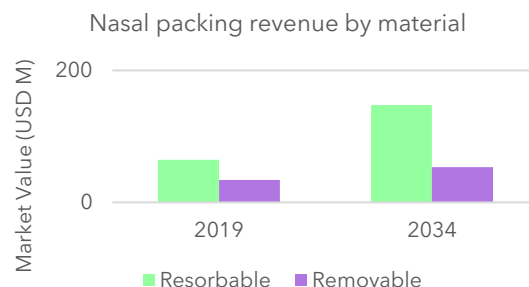
# United States ENT device market

## What's trending and new

### 01. Resorbable nasal packing is widening its lead over removable packing

Resorbable nasal packing continues to be adopted for its advantages:

1. Improved patient comfort due to lack of need for removal.
2. Preferable for patients who are prone to frequent bleeding.



### 02. The use of biologics will limit sinus surgery volumes through 2034

According to interviewed physicians, the increasing use of biologics like DUPIXENT for nasal polyp treatment will limit sinus surgery volumes. Consequently, functional endoscopic sinus surgery (FESS) volumes will only grow at a CAGR of 1.5% from 2019 to 2034.

### 03. There continues to be a push for office-based treatments

Interviewed physicians note that there is an ongoing push for office-based treatments because they are more cost-effective and lead to greater patient satisfaction

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## 2024 U.S. ENT device market snapshot

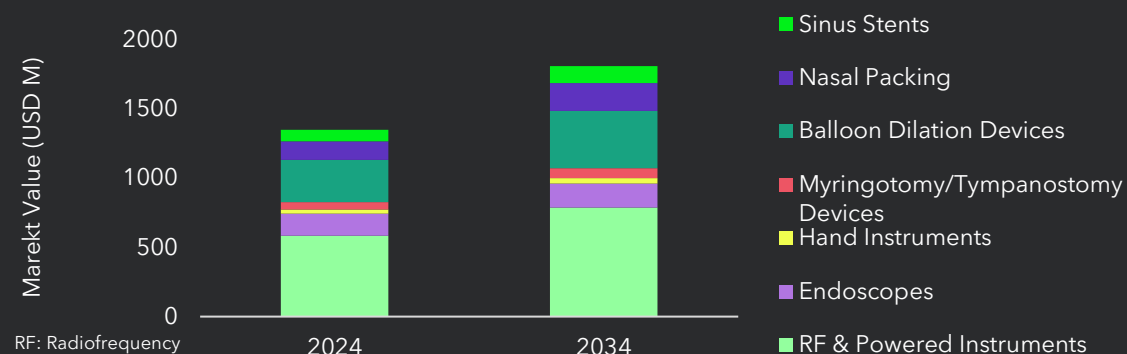
**\$1.3B**

Market revenue

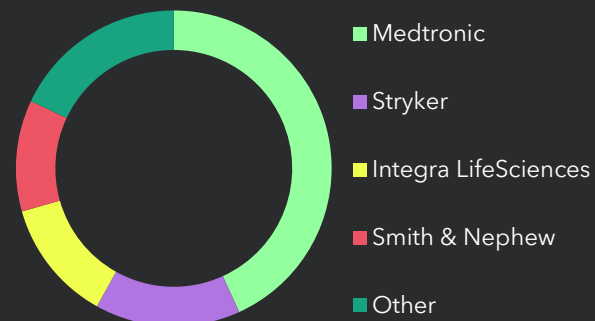
**2.6%**

CAGR ('19-'34)

## U.S. ENT device market, by product type



## 2024 U.S. ENT competitive landscape



## Market leader changes in 2024

- Olympus surpassed Medtronic as the leader in the myringotomy/tympanostomy device segment in 2024, owing to a drop in sales of Medtronic's Armstrong Beveled Grommets.
- Teleflex Medical and Medtronic both surpassed Olympus in the hand instruments segment where it was previously holding the third-highest share.
- Integra LifeSciences is now the market leader in the balloon dilation device market, having acquired Acclarent's portfolio.