
Description: Radiofrequency electrical signals are electromagnetic waves lying in the range of 3 KHz to 300 GHz and are used for creating thermal energy at the point of tissue contact. Radiofrequency has been in use for medical treatment since half a century with progressive technologies being introduced on a regular basis. Today RF ablation is used in general surgery for electrocauterization, vessel sealing, fulguration and vaporization of tissue. It provides significant advantages over conventional surgical blades such as faster healing, lesser pain and lower rate of infection. RF based devices are routinely used in cosmetic and pain management applications such as varicose veins and chronic back pain which is also known as facet joint pain. Radiofrequency ablation in recent years has been approved to treat rare diseases and conditions such as Barrett's Esophagus.

The technology continues to be an upcoming modality for treatment of esophageal squamous intra-epithelial neoplasia, gastric, rectal, and biliary diseases. The designs in RF ablation catheters also continue to develop further with the advent of helical coil electrode designed for future treatment of osteolytic vertebral tumors. Radiofrequency ablation is also used in combination with other forms of treatment thus has a strong potential future in coming years.

RFA has become the image-guided minimally invasive technique of choice today due to its efficacy, safety, and ease of use. This procedure is also often reserved for patients with comorbidities and those who are inoperable for other reasons and one of the major driving factors for this technology is the fact that a large number of cases are treated as out-patient procedures reducing hospital stay and expenditure. Tumor management and cardiac rhythm management were the largest applications accounting for 60.3% of the market for RF devices across the world. In 2014, revenue generated from devices sold for tumor management across the world accounted for a share of 36.1%. Overall clinical applications of RF energy involve 3 major actions on the body; ablation of cancerous tissue, ablation of obstructive and excessive tissue, denervation or deadening of nerves.

Approximately 750,000 new cases of liver cancer are diagnosed each year annually with more than 20,000 being in United States and around 5,000 in the United Kingdom. RF ablation presents one of the best treatment options for solid tumor in liver due to a lack of other alternatives. Lung cancer occurs in over 2.5 million people across the globe and is the leading cause of cancer death with an estimated 1.6 million deaths annually. Although a large percentage of patients are not eligible for surgery, a growing fraction of population is suitable for minimally invasive RF ablation procedure.

The global RF ablation devices market is greatly influenced by the segment or application of devices. There are several players operating in multiple segments such as renal denervation, arthroscopy and pain management together. Acquisitions and mergers have further increased competition of companies and the market shows a trend of consolidation of core competencies in radiofrequency ablation technologies.

Stryker offers RF ablation portfolio for both pain management and arthroscopy, similarly Medtronic Inc (and Covidien) together offer a large RF device portfolio targeting general surgery, renal denervation and tumor management. Major players in this market are Medtronic Inc, Johnson & Johnson, Boston Scientific, St. Jude Medical, Stryker, Arthrex, Haylard Health, Angiodynamics, AtriCure, Sutter and Smith & Nephew. Overall the market is quite fragmented and the industry continues to see consolidation in major therapeutic areas such as cardiac ablation and general surgery.

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