

Global Minimally Invasive Surgical Systems Market: Focus on Product Type, Application, End Users, 25 Countries' Data, Patent Scenario, and Competitive Landscape - Analysis and Forecast, 2021-2031

<https://marketpublishers.com/r/G05E06BDAB01EN.html>

Date: February 2022

Pages: 450

Price: US\$ 5,250.00 (Single User License)

ID: G05E06BDAB01EN

Abstracts

Market Report Coverage - Minimally Invasive Surgical Systems

Market Segmentation

Product - Conventional Technologies (Endoscopes and Endoscopic Systems, Video and Visualization Systems, Capsule Endoscopy, Instruments and Accessories, Others), Surgical Robotics (Robotic Systems, Instruments and Accessories, Services)

Application - General Surgery, Urology Surgery, Gynecology Surgery, Orthopedic Surgery, Cardiovascular Surgery, Neurosurgery, Others

End User - Hospitals, Ambulatory Surgical Centers (ASCs), Specialty Clinics

Region - North America, Europe, Asia-Pacific, Latin America, Middle East and Africa

Regional Segmentation

North America - U.S., Canada

Europe - Germany, France, Spain, U.K., Italy, Netherlands, Belgium,

Switzerland, Sweden, Denmark, Rest-of-Europe

Asia-Pacific - Japan, South Korea, India, China, Australia and New Zealand,
Malaysia, Singapore, Rest-of-Asia-Pacific

Latin America - Brazil, Mexico, Argentina, Rest-of-Latin America

Middle East and Africa - Kingdom of Saudi Arabia (K.S.A.), United Arab
Emirates (U.A.E.), Israel, Rest-of-Middle East and Africa

Market Growth Drivers

Rising Incidence of Chronic Diseases

Advantages Over Open Surgeries

Increase in Global Geriatric Population

Increasing Healthcare Costs

Technological Advancement in Minimally Invasive Surgical Procedures and
Technologies

Market Challenges

High Cost of Minimally Invasive Surgical Robotic Systems

Shortage of Skilled Professionals

Restrictive Reimbursement Landscape

Market Opportunities

Engage in Mergers and Acquisitions to Diversify Endoscopic Portfolio

Development of Surgical Simulators for Training Professionals

Development of Low-Cost Surgical Robotic Systems

Key Companies Profiled

Arthrex Inc., Asensus Surgical, Inc., Boston Scientific Corporation, Conmed Corporation, Fujifilm Holdings Corporation, Intuitive Surgical, Inc., Karl Storz SE & Co. KG, Medtronic plc, Olympus Corporation, Hoya Corporation (Pentax Medical), Siemens Healthineers AG, Smith & Nephew plc, Sony Corporation, Stryker Corporation, Zimmer Biomet Holdings, Inc.

How This Report Can Add Value

Who should buy this report?

Surgical Instruments and Accessories (both Conventional MISS and Surgical Robotics) OEMs to gain a holistic view about the market potential of various systems and the developing economies for business expansions.

Surgical Robotics Manufacturers

Established healthcare companies that are integrating software, machine learning, and AI into the surgical robotic platform

Endoscopes, Endoscopic Systems, Capsule Endoscopy Manufacturers

Established medical technology companies to gain insights about the market potential, market entry strategies, new technologies in the market, and key competitors.

Medical Research Institutions

Healthcare Facilities

Specialty Clinics

Key questions answered in the Report

What are the key regulations governing the minimally invasive surgical systems market, across the globe?

What are the key technological developments on which the current industry leaders are spending their major share of research and development (R&D) investment?

How is the role of minimally invasive surgery technologies expected to evolve in the future?

Who are the leading players who hold significant dominance on the global minimally invasive surgical systems market, currently?

How likely are current business models to persist in the future?

What are the key market drivers, challenges, growth opportunities, and trends?

How do minimally invasive procedures function as compared to each other?

How is the expiration of patents likely to disrupt the market dynamics?

What are the key strategies incorporated by the leading players in the minimally invasive surgical systems landscape?

What is the likelihood of new players entering the market in near term?

What is the current revenue contribution for different endoscopes and endoscopy systems, and what are the expected modifications in the forecast period?

What is the current revenue contribution for the different types of conventional minimally invasive surgical systems, and what are expected modifications in the same forecast period?

What is the current revenue contribution for the different types of surgical robotic systems, and what are the expected modifications in the same forecast period?

Which countries contribute to the major share of current demand and which countries hold significant scope for business expansion activities, by the key

players?

Minimally Invasive Surgical Systems Market Overview

As per the National Cancer Institute, minimally invasive surgery is defined as, “surgery that is done using small incisions (cuts) and few stitches. During minimally invasive surgery, one or more small incisions may be made in the body. A laparoscope (thin, tube-like instrument with a light and a lens for viewing) is inserted through one opening to guide the surgery. Tiny surgical instruments are inserted through other openings to do the surgery. Minimally invasive surgery may cause less pain, scarring, and damage to healthy tissue, and the patient may have a faster recovery than with traditional surgery.”

As per the U.S. Food and Drug Administration (FDA), “Different types of computer-assisted surgical systems can be used for pre-operative planning, surgical navigation, and to assist in performing surgical procedures. Robotically assisted surgical (RAS) devices are one type of computer-assisted surgical system. Sometimes referred to as robotic surgery, RAS devices enable the surgeon to use computer and software technology to control and move surgical instruments through one or more tiny incisions in the patient’s body (minimally invasive) for a variety of surgical procedures.”

The global minimally invasive surgical systems market is estimated to be valued at \$27,882.8 million in 2020 and is anticipated to reach \$55,716.7 million by the end of 2031, growing at a CAGR of 6.3% during 2021-2031.

Market Drivers

Presently, the factors driving the growth of the market as per the minimally invasive surgical systems report include rising incidence of chronic diseases, increase in global geriatric population, advantages of MIS over open surgeries, increasing healthcare costs, technological advancements in surgical procedures and technologies.

Market Challenges

The challenges that are restricting the growth of the market include high cost of surgical robotics systems, shortage of skilled professionals, and restrictive reimbursement landscape.

High cost of the surgical robotic system is among the most challenging factors for the end-user to buy and treatment for patients. It has been observed that many patients prefer international travel for their surgeries to take the advantage of currency rate. Also, due to the shortage of skilled professionals have led a slight increasing the expense of the robotic surgery. Restrictive reimbursement landscape is another factor affecting the growth of the global minimally invasive surgical systems market.

Market Opportunities

Potential opportunities that is likely to boost the growth of the market include development of low-cost surgical robotic systems, development of surgical simulators for the training of professionals, and engagement in mergers and acquisitions to diversify the endoscopic portfolio.

The current radiation therapy systems have a price of around \$2 million, therefore many companies are working in developing cost-effective system and even working towards the development of a low-cost surgical robotic platform. And with time, technologically advanced products are being working, researched to get an upgraded product.

Impact of COVID-19

The COVID-19 pandemic had a huge impact on elective surgical procedures in the first half of 2020. The COVID-19 pandemic has drastically impacted the daily hospital routine services on the global level. During the initial phase of the pandemic, hospitals greatly reduced or cancelled conducting elective surgical procedures for patient safety and to prioritize the care treatments for patients with COVID-19.

The reduction in the volume of elective surgical procedures on a large scale had a substantial impact on patients as well as a financial impact on the medical device manufacturers. This resulted in the decreased sales of the minimally invasive surgical systems.

Market Segmentation

Minimally Invasive Surgical Systems Market (by Product Type)

Under this segmentation, the market in divided into conventional technologies and surgical robotics.

The conventional technologies segment dominates the market with a share of 80.4% of global minimally invasive surgical systems market mainly due to the increase in the number of minimally invasive surgical procedures.

Minimally Invasive Surgical Systems Market (by Application)

Under this segmentation, the market is divided into general surgery, urology surgery, orthopedic surgery, cardiovascular surgery, neurosurgery, others (cosmetic and bariatric surgery)

These above-mentioned applications are based on conventional technologies and surgical robotics segment.

Orthopedic surgery under the conventional technology segment is expected to register the highest CAGR of 7.0% during the forecast period.

Minimally Invasive Surgical Systems Market (by End-User)

Under this segmentation, the market is divided into hospitals, ambulatory surgical centers (ASCs), specialty clinics.

The hospitals segment dominates the minimally invasive surgical systems market with a share of 73.3% of global market mainly due to the number of hospitals providing access to the surgical treatments for the patients.

Ambulatory surgical centers (ASCs) segment is expected to register the highest CAGR of 8.0% during the forecast period.

Minimally Invasive Surgical Systems Market (by Region)

The different regions covered under the market report includes North America, Europe, Asia-Pacific, Latin America, and Middle East and Africa.

North America dominates the market in 2020 and is anticipated to uphold its dominance throughout the forecast period. The growth in the market is majorly driven by the increasing research and development activities and many companies being located in the U.S.

Latin America, and Middle East and Africa market is expected to grow with the highest

CAGR of 7.8% during the forecast period.

Key Market Players and Competition Synopsis

Some of the key players operating in the market, include Arthrex Inc., Asensus Surgical Inc. (formerly TransEnterix Inc.), Boston Scientific Corporation, Conmed Corporation, Fujifilm Holdings Corporation, Intuitive Surgical Inc., Karl Storz SE & Co. KG, Medtronic plc, Olympus Corporation, Hoya Corporation (Pentax Medical), Siemens Healthineers AG, Smith & Nephew plc, Sony Corporation, Stryker Corporation, Zimmer Biomed Holdings Inc.

The minimally invasive surgical systems market has witnessed several strategic and technological developments from January 2017- July 2021, undertaken by the different market players to attain their respective market shares in this emerging domain. Some of the strategies covered in this segment are product development and upgradations, partnerships, collaborations, business expansions, funding activities, regulatory approvals, mergers, and acquisitions. The preferred strategy for companies has been partnerships, collaborations, and business expansions.

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