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Global 3D Protein Structure Analysis Market 2023

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Abstracts

The global market for ambulatory surgical center operating room integration systems is projected to reach $3.72 billion by 2029, growing at a CAGR of 7.2% from 2023 to 2029. This growth is driven by increasing demand for outpatient care, cost savings in ASCs, and government support for ASCs. The market includes various products used in ASC operating rooms, such as visualization, lighting, imaging, OR integration software, and other products like insufflators, medical printing devices, and OR communication and control systems. Integrated ORs with centralized consoles are popular due to the rising preference for minimally invasive procedures and streamlined surgical workflows. Opportunities exist in emerging countries for OR software integration, advancements in CT imaging, and adoption of intraoperative imaging systems. Key trends include demand for 4K visualization, ASC-hospital partnerships, preference for large surgical monitors, new product offerings, and global expansion by companies. COVID-19 has shifted non-essential surgeries to ASCs and HOPDs, increasing demand for ASC services. ASCs are upgrading and integrating ORs to align with hospital technology and services. The market is driven by OR integration benefits, cost savings in ASCs, outpatient care demand, government support, and patient safety concerns. Limitations include high initial investment and low reimbursement rates affecting ASC profitability.

Market Segmentation
The market is segmented based on various factors, including component, center type, and region.

Segmentation by Component
OR Visualization
OR Lighting
OR Imaging
OR Integration Software
Other OR Integration Products

Segmentation by Center Type
Single-Specialty ASCs
Multi-Specialty ASCs

Segmentation by Region
North America - U.S., Canada
Europe - Germany, France, U.K., Italy, Spain, Czech Republic, Russia, Rest-of-Europe
Asia-Pacific - Japan, China, India, Australia and New Zealand, Rest-of-Asia-Pacific
Latin America - Brazil, Mexico, Rest-of-Latin America
Rest-of-the-World - U.A.E., K.S.A., South Africa, Turkey, Rest-of-Rest-of-the-World

The OR visualization segment is expected to dominate the global market for ambulatory surgical center operating room integration systems. This segment offers the highest incremental opportunity, followed by the OR imaging and OR software segments. Ambulatory surgical centers (ASCs) typically have a lower level of integration compared to hospitals, with basic visualization solutions such as endoscopic cameras and wall monitors. OR visualization includes various products such as OR displays, camera systems, video solutions, and surgical light sources.

The growth of the OR visualization segment is driven by factors like the increasing number of minimally invasive surgical procedures, advancements in healthcare, and rising healthcare expenditure. Diseases like cancer and gastrointestinal disorders have also led to the development of innovative visualization tools. Technological advancements and research efforts will further contribute to market growth.

Single-specialty ASCs are expected to create the largest incremental opportunity within the ASC segment. These centers focus on specific specialties and maximize the benefits of ambulatory surgery facilities. In single-specialty ASCs, physicians specialize in the same medical practice area.

North America and Europe, with advanced healthcare systems and substantial budgets, hold the largest shares in the global market. North America accounted for the highest market share in 2022, followed by Europe. The Asia Pacific region is expected to witness significant growth during the forecast period.

Competitive Landscape
The profiled companies in this report, including Arthrex, Inc., Avante Health Solutions, Barco NV, Canon Inc., EIZO Corporation, FUJIFILM Holdings Corporation, General

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Electric Company, Getinge AB, KARL STORZ SE & Co. KG, Koninklijke Philips N.V., Olympus Corporation, Richard Wolf GmbH, Siemens Healthineers AG, STERIS plc, and Stryker Corporation, were carefully selected through a rigorous process that involved input from primary experts, analysis of company coverage, assessment of product portfolios, and evaluation of market penetration.

Recent Industry Developments

Arthrex Inc. and Skytron partnered in July 2022 to enhance operating room technology and infrastructure solutions in the United States.

General Electric Company collaborated with Medtronic in April 2022 to meet the needs of ambulatory surgery centers and office-based labs. This partnership provides customers with comprehensive product portfolios, financial solutions, and exceptional service.

Philips Healthcare introduced advanced 3D image guidance capabilities in January 2022 through its Image-Guided Therapy Mobile C-arm System Zenition, offering physicians enhanced tools.

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