

The World Market for Minimally Invasive Surgical Devices

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Abstracts

Minimally invasive surgery (MIS) currently allows doctors to perform many complicated operations with a short hospital stay. MIS is appealing to patients because it means less trauma to the body, less blood loss, smaller surgical scars, shorter hospital stays and less need for pain medication. It is a safe, feasible, and patient-friendly method of performing an operation. Minimally invasive surgery (MIS) is available for many different types of surgical operations.

This report includes product information, procedure volume data, world demographics, and other general issues affecting the MIS device market. A market summary includes market analysis in six general surgery areas reflecting revenues earned by all manufacturers in all MIS methods in the following areas:

Orthopedic MIS Device Market (Scopes, Surgical Instruments)

Neurosurgery MIS Device Market (Scopes, Surgical Instruments)

ENT/Respiratory MIS Device Market (Scopes, Surgical Instruments)

Cardiovascular MIS Device Market (Scopes, Surgical Instruments)

Gastrointestinal System MIS Device Market (Scopes, Surgical Instruments)

Urological and Gynecological MIS Device Market (Scopes, Surgical Instruments)

All market data pertains to the world market at the manufacturers' level. The base year

for data was 2012. Historical data was provided for the years 2010 and 2011, with forecast data provided for 2013 through 2017. Compound annual growth rates (CAGRs) are provided for the 2010-2012 and 2013-2017 periods for each region and/or segment covered. Competitive analysis is provided for the year 2012. The forecasted market analysis for 2013-2017 was largely based on demographic trends, new developments, and global expansion. The market was further segmented into endoscopes and instruments. The information for this report was gathered using both primary and secondary research including comprehensive research of secondary sources such as company literature, databases, investment reports, and medical and business journals.

The following companies are profiled in this report:

Aesculap Division

Alphatec Holdings Inc.

Applied Medical

Arthrex

ArthroCare Inc

Biomet

Boston Scientific Corporation

ConMed Corporation

Covidien Ltd

Depuy Synthes, Inc.

FujiFilm Holdings Corporation

Given Imaging, Ltd.

Hoya Corporation

Integra LifeSciences

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Omniguide Surgical

Orthofix Holdings Inc.

Pare Surgical, Inc

Pentax Medical Company

REMA Medizintechnik GmbH

Richard Wolf GmbH

Sagentia Inc

Smith & Nephew, Plc

Stryker Corporation U.S.

Surgical Innovations Group Plc

Virtual Ports, Ltd.

Zhejiang Tiansong Medical Instrument Co. Ltd.

Zimmer Holdings

Telephone interviews and email correspondence were the primary methods of gathering information. For the purpose of this study, Kalorama Information conducted interviews with more than 45 key industry officials, consultants, health care providers, and government personnel. These sources were the primary basis in gathering information specifically relating to revenue and market share data presented in this report. Additional interviews were completed with relevant company representatives including marketing directors, division managers, and product representatives.

The purpose of this report is to provide an understanding of the total current market for all MIS methods for each therapeutic area. In the scope of this report they are considered as competitive methods and are not broken down to specific device segments (for instance 'Gastrointestinal System Devices' will contain a number for all competing MIS methods in GI, but will not have a specific sigmoidoscope or GI endoscope number).

As this is a global survey, revenues and a five year forecast are provided for the following regions:

US

Europe

Japan

Rest of World

Procedure volumes are available for the following surgeries for which minimally invasive equipment is utilized:

Hip Replacement, Pinning, etc.

Knee Repair/Fixation, Procedures

Spinal Fusion/Spinal Hardware Removal

Shoulder Repair/Fixation

Lumbar Laminectomy/ Thoracic-lumbar

Laminectomy/Discectomy and Lumbar Decompression and Fusion

Craniotomy (all types)

Ventricular-Peritoneal Shunt Insertion/ Removal/Revision

Detether Cord (adult and pediatric)

Ethmoidectomy

Tonsillectomy

Thyroidectomy

Coronary Revascularization

Aortic Valve Replacement or Repair

Cardiac Catheterization

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The other instruments consist of handheld instruments, guiding devices, and auxiliary devices that are used in the gastrointestinal and other areas of minimally invasive surgery.

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