

Medical Robotics Market by Product and Services (Instrument and Accessories, Robotic Systems, Services, and Consumables), by Application (General Surgery, Orthopedic Surgery, Neurosurgery, Gynecological Surgery, Urological Surgery, Oncological Surgery, Transoral Surgery, Physical Rehabilitation, External Beam Radiation Therapy, and Other Applications), by End Users (Hospitals, Home Care Settings, Ambulatory Surgery Centers, Rehabilitation Center, and Other End-Users) - Global Opportunity Analysis and Industry Forecast, 2024–2030

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Abstracts

The Medical robotics Market size was valued at USD 14.92 billion in 2023 and is predicted to reach USD 45.04 billion by 2030, with a CAGR of 17.1% from 2024 to 2030.

The integration of medical robots, particularly exoskeleton devices, plays a crucial role in addressing the challenges posed by conditions such as spinal cord injury, rehabilitation, multiple sclerosis, and stroke. The surge in cases of these health issues has led to a growing demand for innovative solutions, and medical robots that include exoskeletons have proven to be transformative in the healthcare landscape.

For instance, Ekso Bionics Holdings, Inc. introduced EksoNR, a next-generation robotic

exoskeleton designed to aid patients in their recovery from conditions including stroke. This intuitive exoskeleton device empowers individuals to relearn walking with a more natural gait, enhancing the rehabilitation process. The development of such advanced robotic technologies is instrumental in providing patients with a higher quality of care and improving their chances of regaining mobility.

Moreover, the medical robotics market is witnessing significant growth due to the proactive efforts of organizations aiming to extend the benefits of exoskeleton technology to a broader patient population. As an example, The International Spinal Cord Society conducted a clinical trial called WISE in 2022. This trial focused on a 12-week regimen of exoskeleton-based robotic gait training to monitor significant enhancements in independent gait speed among individuals with chronic incomplete spinal cord injury (iSCI).

In addition, governments around the world are actively contributing to the growth of the medical robotics market by implementing comprehensive strategies within the healthcare industry. Through substantial investments in research and development, governments are promoting the exploration of innovative solutions in medical robotics, leading to technological advancements that address the ever-changing healthcare landscape. For instance, in October 2021, the European Investment Bank (EIB) invested USD 17.4 million in Quantum Surgical for the commercial launch of its Epione medical robot that was used for the minimally invasive liver treatment of cancer.

However, the high initial cost of acquiring and implementing medical robotics systems constitutes a significant restraint on the market's growth. On the contrary, the integration of AI in medical robotics has the potential to streamline healthcare processes and enhance patient outcomes. AI-powered robotic systems can assist healthcare professionals by automating routine tasks, allowing them to focus on more complex aspects of patient care. This ongoing convergence of AI and medical robotics presents a pathway toward future advancements, promising innovative solutions, and further optimization of healthcare practices.

For instance, in September 2023, US Medical Innovations (USMI) and the Jerome Canady Research Institute for Advanced and Biological Technological Sciences (JCRI-ABTS) launched the new Canady Robotic AI Surgical System. It is claimed to be the world's first artificial intelligence (AI) robotic system that generates cold atmospheric plasma (CAP), and a three-dimensional non-contact bioelectric pulse electromagnetic field.

Segment Overview

The global medical robotics market is segmented on the basis of product and services, application, end user, and region.

By product & services, the market is classified into instrument and accessories, robotic systems, services, and consumables.

By application, the market is segmented into general surgery, orthopedic surgery, neurosurgery, gynecological surgery, urological surgery, oncological surgery, transoral surgery, physical rehabilitation, external beam radiation therapy, and other application.

By end user, the market is categorized into hospitals, home care settings, ambulatory surgery centers, rehabilitation center, and other end-users.

Region-wise, the market is segmented into North America, Europe, Asia-Pacific, and the rest of the world (RoW).

Regional Analysis

North America holds the dominant share of the market

The expansion of the medical robotics market is propelled by the active involvement of major industry leaders, such as Johnson & Johnson, Intuitive Surgical, iRobot Corporation, Zimmer Biomet Holdings, Inc., and others. These global giants are implementing strategic measures to enlarge their market presence and are heavily investing in research and development initiatives, thereby playing a pivotal role in the substantial growth of the medical robotics sector.

A noteworthy example of this trend is evident in August 2021, when Zimmer Biomet Holdings, Inc., a renowned global medical technology leader received FDA 510(k) clearance for the ROSA Hip System, designed for robotically-assisted direct anterior total hip replacement. This marked the introduction of the fourth robotic system by Zimmer Biomet, augmenting the comprehensive ROSA Robotics portfolio. This portfolio encompasses the ROSA Knee System for total knee arthroplasty, ROSA Partial Knee System for partial knee arthroplasty, and ROSA ONE for neurosurgical and spine procedures.

Additionally, the market growth is further propelled by the proactive initiatives taken by key players in the robotic-assisted surgery domain, particularly in Canada. An illustrative instance is the product launch by Medtronic Canada ULC in October 2021, wherein the Mazor X System for robotic-guided spine surgery was introduced. This innovative system employs advanced 3D planning software to assist surgeons in precise placement of screws and other implants. The Mazor platform, with its three-dimensional capabilities, enables surgeons to rapidly visualize anatomical structures and spinal features, contributing significantly to the overall expansion of the medical robotics market.

Key Market Players

The key players in the Medical Robotics Market include companies such as:

Medtronic Plc

Smith and Nephew

Omniceil Inc.

Accuray incorporated

iRobot Corporation

ARxIUM

Renishaw Plc

CMR Surgical

BD Rowa

Siemens Healthineers AG

Zimmer Biomet holdings, Inc.

Intuitive Surgical

Stryker Corporation

Johnson & Johnson

Teladoc Health

Recent Developments

September 2023

Accuray Incorporated received approval from the Japanese Ministry of Health, Labor, and Welfare (Shonin) to market the CyberKnife Robotic Radiosurgery System for treating trigeminal neuralgia (TN) in Japan. The CyberKnife system offers a high-precision radiosurgery treatment, administered in a single outpatient procedure

October 2022

Medtronic plc achieved major milestones in the medical robotics market with significant regulatory approvals for its Hugo robotic-assisted surgery system. These include CE Mark clearance for general surgery, a Health Canada license for general laparoscopic surgery, and approval from Japan's Ministry of Health, Labor, and Welfare for urological and gynecological indications. This highlights Medtronic's commitment to advancing medical robotics and enhancing healthcare solutions worldwide.

November 2021

Smith+Nephew, the global medical technology company, introduced the CORI handheld robotics system, a cutting-edge solution designed for both total and partial knee arthroplasties. The CORI system stands out as a compact and fully mobile solution, integrating a 3-D intra-operative imaging system alongside an advanced robotic sculpting tool.

February 2021

CMR Surgical introduced Versius Surgical Robotic System in Germany which is specifically designed for minimally invasive surgery. It aims to be both affordable and flexible, intending to enhance accessibility to robotic surgery for hospitals and surgeons.

October 2021

Medtronic Canada ULC launched the Mazor X System for robotic-guided spine surgery. This innovative system employs advanced 3D planning software to assist surgeons in precise placement of screws and other implants. The Mazor platform, with its three-dimensional capabilities, enables surgeons to rapidly visualize anatomical structures and spinal features, contributing significantly to the overall expansion of the medical robotics market.

KEY BENEFITS

The medical robotics market report provides a quantitative analysis of the current market and estimations from 2024 to 2030. This analysis assists in identifying the prevailing market opportunities.

The study comprises a detailed analysis of the medical robotics market trends, including current and future trends to depict prevalent investment pockets in the market.

The information related to key drivers, restraints, and opportunities and their impact on the medical robotics market is provided in the report.

The competitive analysis of the market players along with their market share in the medical robotics market is provided in the report.

The SWOT analysis and Porter's Five Forces model are elaborated in the report.

The value chain analysis in the market study provides a clear picture of the role of stakeholders.

Contents

1.... INTRODUCTION

- 1.1. REPORT DESCRIPTION
- 1.2. WHO SHOULD READ THIS REPORT
- 1.3. KEY MARKET SEGMENTS
- 1.4. RESEARCH METHODOLOGY
 - 1.4.1 SECONDARY RESEARCH
 - 1.4.2 DATA ANALYSIS FRAMEWORK
 - 1.4.3 MARKET SIZE ESTIMATION
 - 1.4.4 FORECASTING
 - 1.4.5 PRIMARY RESEARCH AND DATA VALIDATION

2.... MEDICAL ROBOTICS MARKET – EXECUTIVE SUMMARY

- 2.1. MARKET SNAPSHOT, 2023 - 2030, MILLION USD

3.... MARKET OVERVIEW

- 3.1. MARKET DEFINITION AND SCOPE
- 3.2. MARKET DYNAMICS
 - 3.2.1 DRIVERS
 - 3.2.1.1. ADVANTAGES OF ROBOT-ASSISTED SURGERIES
 - 3.2.1.2. INCREASING ADOPTION OF MEDICAL ROBOTS
 - 3.2.1.3. INCREASING USE OF ROBOTS IN MINIMALLY INVASIVE SURGERIES AND DISEASES
 - 3.2.2 RESTRAINTS
 - 3.2.2.1. HIGH COST OF ROBOTIC SYSTEMS
 - 3.2.3 OPPORTUNITIES
 - 3.2.3.1. RISING APPLICABILITY AND TECHNOLOGICAL ADVANCEMENTS OF ROBOT-ASSISTED TRAINING

4.... MARKET SHARE ANALYSIS

- 4.1. MARKET SHARE ANALYSIS OF TOP 10 MEDICAL ROBOTS' PROVIDERS, 2021
- 4.2. ROBOTIC SOLUTIONS INSTALLED BASE

5.... GLOBAL MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

5.1. OVERVIEW

5.2. INSTRUMENT AND ACCESSORIES

5.2.1 INSTRUMENT AND ACCESSORIES MARKET, BY REGION

5.2.1.1. NORTH AMERICA INSTRUMENT AND ACCESSORIES MARKET, BY COUNTRY

5.2.1.2. EUROPE INSTRUMENT AND ACCESSORIES MARKET, BY COUNTRY

5.2.1.3. ASIA-PACIFIC INSTRUMENT AND ACCESSORIES MARKET, BY COUNTRY

5.2.1.4. REST OF WORLD INSTRUMENT AND ACCESSORIES MARKET, BY COUNTRY

5.3. ROBOTIC SYSTEMS

5.3.1 GLOBAL ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

5.3.1.1. SURGICAL ROBOTIC SYSTEMS

5.3.1.1.1. GLOBAL SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

5.3.1.1.1.1. SOFT TISSUE SURGERIES MARKET, BY REGION

5.3.1.1.1.1.1. NORTH AMERICA SOFT TISSUE SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.1.2. EUROPE SOFT TISSUE SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.1.3. ASIA-PACIFIC SOFT TISSUE SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.1.4. REST OF WORLD SOFT TISSUE SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.2. HARD TISSUE SURGERIES MARKET, BY REGION

5.3.1.1.1.2.1. NORTH AMERICA HARD TISSUE SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.2.2. EUROPE HARD TISSUE SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.2.3. ASIA-PACIFIC HARD TISSUE SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.2.4. REST OF WORLD HARD TISSUE SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.3. MICRO SURGERIES MARKET, BY REGION

5.3.1.1.1.3.1. NORTH AMERICA MICRO SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.3.2. EUROPE MICRO SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.3.3. ASIA-PACIFIC MICRO SURGERIES MARKET, BY COUNTRY

5.3.1.1.1.3.4. REST OF WORLD MICRO SURGERIES MARKET, BY COUNTRY

5.3.1.2. SURGICAL ROBOTIC SYSTEMS MARKET, BY REGION

5.3.1.2.1. NORTH AMERICA SURGICAL ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.2.2. EUROPE SURGICAL ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.2.3. ASIA-PACIFIC SURGICAL ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.2.4. REST OF WORLD SURGICAL ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.3. LOGISTICS/HANDLING ROBOTIC SYSTEMS MARKET, BY REGION

5.3.1.3.1. NORTH AMERICA LOGISTICS/HANDLING ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.3.2. EUROPE LOGISTICS/HANDLING ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.3.3. ASIA-PACIFIC LOGISTICS/HANDLING ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.3.4. REST OF WORLD LOGISTICS/HANDLING ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.4. REHABILITATION ROBOTIC SYSTEMS

5.3.1.4.1. GLOBAL REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

5.3.1.4.1.1. THERAPEUTIC ROBOTIC SYSTEMS MARKET, BY REGION

5.3.1.4.1.1.1. NORTH AMERICA THERAPEUTIC ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.4.1.1.2. EUROPE THERAPEUTIC ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.4.1.1.3. ASIA-PACIFIC THERAPEUTIC ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.4.1.1.4. REST OF WORLD THERAPEUTIC ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.4.1.2. ASSISTIVE ROBOTIC SYSTEMS MARKET, BY REGION

5.3.1.4.1.2.1. NORTH AMERICA ASSISTIVE ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.4.1.2.2. EUROPE ASSISTIVE ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.4.1.2.3. ASIA-PACIFIC ASSISTIVE ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.4.1.3. EXOSKELETON ROBOTIC SYSTEMS MARKET, BY REGION

5.3.1.4.1.3.1. NORTH AMERICA EXOSKELETON ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.4.1.3.2. EUROPE EXOSKELETON ROBOTIC SYSTEMS MARKET, BY

COUNTRY

5.3.1.4.1.3.3. ASIA-PACIFIC EXOSKELETON ROBOTIC SYSTEMS MARKET,
BY COUNTRY

5.3.1.4.1.3.4. REST OF WORLD EXOSKELETON ROBOTIC SYSTEMS
MARKET, BY COUNTRY

5.3.1.4.1.4. OTHER REHABILITATION ROBOTIC SYSTEMS MARKET, BY
REGION

5.3.1.4.1.4.1. NORTH AMERICA OTHER REHABILITATION ROBOTIC
SYSTEMS MARKET, BY COUNTRY

5.3.1.4.1.4.2. EUROPE OTHER REHABILITATION ROBOTIC SYSTEMS
MARKET, BY COUNTRY

5.3.1.4.1.4.3. ASIA-PACIFIC OTHER REHABILITATION ROBOTIC SYSTEMS
MARKET, BY COUNTRY

5.3.1.4.1.4.4. REST OF WORLD OTHER REHABILITATION ROBOTIC
SYSTEMS MARKET, BY COUNTRY

5.3.1.5. REHABILITATION ROBOTIC SYSTEMS MARKET, BY REGION

5.3.1.5.1. NORTH AMERICA REHABILITATION ROBOTIC SYSTEMS MARKET,
BY COUNTRY

5.3.1.5.2. EUROPE REHABILITATION ROBOTIC SYSTEMS MARKET, BY
COUNTRY

5.3.1.5.3. ASIA-PACIFIC REHABILITATION ROBOTIC SYSTEMS MARKET, BY
COUNTRY

5.3.1.5.4. REST OF WORLD REHABILITATION ROBOTIC SYSTEMS MARKET,
BY COUNTRY

5.3.1.6. NONINVASIVE RADIOSURGERY ROBOTIC SYSTEMS MARKET, BY
REGION

5.3.1.6.1. NORTH AMERICA NONINVASIVE RADIOSURGERY ROBOTIC
SYSTEMS MARKET, BY COUNTRY

5.3.1.6.2. EUROPE NONINVASIVE RADIOSURGERY ROBOTIC SYSTEMS
MARKET, BY COUNTRY

5.3.1.6.3. ASIA-PACIFIC NONINVASIVE RADIOSURGERY ROBOTIC SYSTEMS
MARKET, BY COUNTRY

5.3.1.6.4. REST OF WORLD NONINVASIVE RADIOSURGERY ROBOTIC
SYSTEMS MARKET, BY COUNTRY

5.3.1.7. DIAGNOSTIC AND IMAGING ROBOTIC SYSTEMS MARKET, BY REGION

5.3.1.7.1. NORTH AMERICA DIAGNOSTIC AND IMAGING ROBOTIC SYSTEMS
MARKET, BY COUNTRY

5.3.1.7.2. EUROPE DIAGNOSTIC AND IMAGING ROBOTIC SYSTEMS MARKET,
BY COUNTRY

5.3.1.7.3. ASIA-PACIFIC DIAGNOSTIC AND IMAGING ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.7.4. REST OF WORLD DIAGNOSTIC AND IMAGING ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.8. TELEMEDICINE ROBOTIC SYSTEMS MARKET, BY REGION

5.3.1.8.1. NORTH AMERICA TELEMEDICINE ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.8.2. EUROPE TELEMEDICINE ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.8.3. ASIA-PACIFIC TELEMEDICINE ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.8.4. REST OF WORLD TELEMEDICINE ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.9. OTHER ROBOTIC SYSTEMS MARKET, BY REGION

5.3.1.9.1. NORTH AMERICA OTHER ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.9.2. EUROPE OTHER ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.9.3. ASIA-PACIFIC OTHER ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.1.9.4. REST OF WORLD OTHER ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.2 ROBOTIC SYSTEMS MARKET, BY REGION

5.3.2.1. NORTH AMERICA ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.2.2. EUROPE ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.2.3. ASIA-PACIFIC ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.3.2.4. REST OF WORLD ROBOTIC SYSTEMS MARKET, BY COUNTRY

5.4. SERVICES

5.4.1 SERVICES MARKET, BY REGION

5.4.1.1. NORTH AMERICA SERVICES MARKET, BY COUNTRY

5.4.1.2. EUROPE SERVICES MARKET, BY COUNTRY

5.4.1.3. ASIA-PACIFIC SERVICES MARKET, BY COUNTRY

5.4.1.4. REST OF WORLD SERVICES MARKET, BY COUNTRY

5.5. CONSUMABLES

5.5.1 CONSUMABLES MARKET, BY REGION

5.5.1.1. NORTH AMERICA CONSUMABLES MARKET, BY COUNTRY

5.5.1.2. EUROPE CONSUMABLES MARKET, BY COUNTRY

5.5.1.3. ASIA-PACIFIC CONSUMABLES MARKET, BY COUNTRY

5.5.1.4. REST OF WORLD CONSUMABLES MARKET, BY COUNTRY

6.... GLOBAL MEDICAL ROBOTICS MARKET, BY APPLICATION

6.1. OVERVIEW

6.2. GENERAL SURGERY

6.2.1 GENERAL SURGERY MARKET, BY REGION

6.2.1.1. NORTH AMERICA GENERAL SURGERY MARKET, BY COUNTRY

6.2.1.2. EUROPE GENERAL SURGERY MARKET, BY COUNTRY

6.2.1.3. ASIA-PACIFIC GENERAL SURGERY MARKET, BY COUNTRY

6.2.1.4. REST OF WORLD GENERAL SURGERY MARKET, BY COUNTRY

6.3. ORTHOPEDIC SURGERY

6.3.1 ORTHOPEDIC SURGERY MARKET, BY REGION

6.3.1.1. NORTH AMERICA ORTHOPEDIC SURGERY MARKET, BY COUNTRY

6.3.1.2. EUROPE ORTHOPEDIC SURGERY MARKET, BY COUNTRY

6.3.1.3. ASIA-PACIFIC ORTHOPEDIC SURGERY MARKET, BY COUNTRY

6.3.1.4. REST OF WORLD ORTHOPEDIC SURGERY MARKET, BY COUNTRY

6.4. NEUROSURGERY

6.4.1 NEUROSURGERY MARKET, BY REGION

6.4.1.1. NORTH AMERICA NEUROSURGERY MARKET, BY COUNTRY

6.4.1.2. EUROPE NEUROSURGERY MARKET, BY COUNTRY

6.4.1.3. ASIA-PACIFIC NEUROSURGERY MARKET, BY COUNTRY

6.4.1.4. REST OF WORLD NEUROSURGERY MARKET, BY COUNTRY

6.5. GYNECOLOGICAL SURGERY

6.5.1 GYNECOLOGICAL SURGERY MARKET, BY REGION

6.5.1.1. NORTH AMERICA GYNECOLOGICAL SURGERY MARKET, BY COUNTRY

6.5.1.2. EUROPE GYNECOLOGICAL SURGERY MARKET, BY COUNTRY

6.5.1.3. ASIA-PACIFIC GYNECOLOGICAL SURGERY MARKET, BY COUNTRY

6.5.1.4. REST OF WORLD GYNECOLOGICAL SURGERY MARKET, BY COUNTRY

6.6. UROLOGICAL SURGERY

6.6.1 UROLOGICAL SURGERY MARKET, BY REGION

6.6.1.1. NORTH AMERICA UROLOGICAL SURGERY MARKET, BY COUNTRY

6.6.1.2. EUROPE UROLOGICAL SURGERY MARKET, BY COUNTRY

6.6.1.3. ASIA-PACIFIC UROLOGICAL SURGERY MARKET, BY COUNTRY

6.6.1.4. REST OF WORLD UROLOGICAL SURGERY MARKET, BY COUNTRY

6.7. ONCOLOGICAL SURGERY

6.7.1 ONCOLOGICAL SURGERY MARKET, BY REGION

6.7.1.1. NORTH AMERICA ONCOLOGICAL SURGERY MARKET, BY COUNTRY

6.7.1.2. EUROPE ONCOLOGICAL SURGERY MARKET, BY COUNTRY

6.7.1.3. ASIA-PACIFIC ONCOLOGICAL SURGERY MARKET, BY COUNTRY

6.7.1.4. REST OF WORLD ONCOLOGICAL SURGERY MARKET, BY COUNTRY

6.8. TRANSORAL SURGERY

6.8.1 TRANSORAL SURGERY MARKET, BY REGION

6.8.1.1. NORTH AMERICA TRANSORAL SURGERY MARKET, BY COUNTRY

6.8.1.2. EUROPE TRANSORAL SURGERY MARKET, BY COUNTRY

6.8.1.3. ASIA-PACIFIC TRANSORAL SURGERY MARKET, BY COUNTRY

6.8.1.4. REST OF WORLD TRANSORAL SURGERY MARKET, BY COUNTRY

6.9. LAPAROSCOPY

6.9.1 LAPAROSCOPY MARKET, BY REGION

6.9.1.1. NORTH AMERICA LAPAROSCOPY MARKET, BY COUNTRY

6.9.1.2. EUROPE LAPAROSCOPY MARKET, BY COUNTRY

6.9.1.3. ASIA-PACIFIC LAPAROSCOPY MARKET, BY COUNTRY

6.9.1.4. REST OF WORLD LAPAROSCOPY MARKET, BY COUNTRY

6.10. PHARMACY APPLICATIONS

6.10.1 PHARMACY APPLICATIONS MARKET, BY REGION

6.10.1.1. NORTH AMERICA PHARMACY APPLICATIONS MARKET, BY COUNTRY

6.10.1.2. EUROPE PHARMACY APPLICATIONS MARKET, BY COUNTRY

6.10.1.3. ASIA-PACIFIC PHARMACY APPLICATIONS MARKET, BY COUNTRY

6.10.1.4. REST OF WORLD PHARMACY APPLICATIONS MARKET, BY COUNTRY

6.11. PHYSICAL REHABILITATION

6.11.1 PHYSICAL REHABILITATION MARKET, BY REGION

6.11.1.1. NORTH AMERICA PHYSICAL REHABILITATION MARKET, BY COUNTRY

6.11.1.2. EUROPE PHYSICAL REHABILITATION MARKET, BY COUNTRY

6.11.1.3. ASIA-PACIFIC PHYSICAL REHABILITATION MARKET, BY COUNTRY

6.11.1.4. REST OF WORLD PHYSICAL REHABILITATION MARKET, BY COUNTRY

6.12. OTHER APPLICATIONS

6.12.1 OTHER APPLICATIONS MARKET, BY REGION

6.12.1.1. NORTH AMERICA OTHER APPLICATIONS MARKET, BY COUNTRY

6.12.1.2. EUROPE OTHER APPLICATIONS MARKET, BY COUNTRY

6.12.1.3. ASIA-PACIFIC OTHER APPLICATIONS MARKET, BY COUNTRY

6.12.1.4. REST OF WORLD OTHER APPLICATIONS MARKET, BY COUNTRY

7.... GLOBAL MEDICAL ROBOTICS MARKET, BY ENDUSER

7.1. OVERVIEW

7.2. HOSPITALS

7.2.1 GLOBAL HOSPITALS MARKET, BY ENDUSER

7.2.1.1. INPATIENT MARKET, BY REGION

7.2.1.1.1. NORTH AMERICA INPATIENT MARKET, BY COUNTRY

7.2.1.1.2. EUROPE INPATIENT MARKET, BY COUNTRY

7.2.1.1.3. ASIA-PACIFIC INPATIENT MARKET, BY COUNTRY

- 7.2.1.1.4. REST OF WORLD INPATIENT MARKET, BY COUNTRY
- 7.2.1.2. OUTPATIENT MARKET, BY REGION
 - 7.2.1.2.1. NORTH AMERICA OUTPATIENT MARKET, BY COUNTRY
 - 7.2.1.2.2. EUROPE OUTPATIENT MARKET, BY COUNTRY
 - 7.2.1.2.3. ASIA-PACIFIC OUTPATIENT MARKET, BY COUNTRY
 - 7.2.1.2.4. REST OF WORLD OUTPATIENT MARKET, BY COUNTRY
- 7.2.2 HOSPITALS MARKET, BY REGION
 - 7.2.2.1. NORTH AMERICA HOSPITALS MARKET, BY COUNTRY
 - 7.2.2.2. EUROPE HOSPITALS MARKET, BY COUNTRY
 - 7.2.2.3. ASIA-PACIFIC HOSPITALS MARKET, BY COUNTRY
 - 7.2.2.4. REST OF WORLD HOSPITALS MARKET, BY COUNTRY
- 7.3. HOME CARE SETTINGS
 - 7.3.1 HOME CARE SETTINGS MARKET, BY REGION
 - 7.3.1.1. NORTH AMERICA HOME CARE SETTINGS MARKET, BY COUNTRY
 - 7.3.1.2. EUROPE HOME CARE SETTINGS MARKET, BY COUNTRY
 - 7.3.1.3. ASIA-PACIFIC HOME CARE SETTINGS MARKET, BY COUNTRY
 - 7.3.1.4. REST OF WORLD HOME CARE SETTINGS MARKET, BY COUNTRY
- 7.4. AMBULATORY SURGERY CENTERS
 - 7.4.1 AMBULATORY SURGERY CENTERS MARKET, BY REGION
 - 7.4.1.1. NORTH AMERICA AMBULATORY SURGERY CENTERS MARKET, BY COUNTRY
 - 7.4.1.2. EUROPE AMBULATORY SURGERY CENTERS MARKET, BY COUNTRY
 - 7.4.1.3. ASIA-PACIFIC AMBULATORY SURGERY CENTERS MARKET, BY COUNTRY
 - 7.4.1.4. REST OF WORLD AMBULATORY SURGERY CENTERS MARKET, BY COUNTRY
- 7.5. REHABILITATION CENTERS
 - 7.5.1 REHABILITATION CENTERS MARKET, BY REGION
 - 7.5.1.1. NORTH AMERICA REHABILITATION CENTERS MARKET, BY COUNTRY
 - 7.5.1.2. EUROPE REHABILITATION CENTERS MARKET, BY COUNTRY
 - 7.5.1.3. ASIA-PACIFIC REHABILITATION CENTERS MARKET, BY COUNTRY
 - 7.5.1.4. REST OF WORLD REHABILITATION CENTERS MARKET, BY COUNTRY
- 7.6. OTHER END USERS
 - 7.6.1 OTHER END USERS MARKET, BY REGION
 - 7.6.1.1. NORTH AMERICA OTHER END USERS MARKET, BY COUNTRY
 - 7.6.1.2. EUROPE OTHER END USERS MARKET, BY COUNTRY
 - 7.6.1.3. ASIA-PACIFIC OTHER END USERS MARKET, BY COUNTRY
 - 7.6.1.4. REST OF WORLD OTHER END USERS MARKET, BY COUNTRY

8.... GLOBAL MEDICAL ROBOTICS MARKET, BY REGION

8.1. OVERVIEW

8.2. NORTH AMERICA

8.2.1 NORTH AMERICA MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.2.1.1. NORTH AMERICA ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.2.1.1.1. NORTH AMERICA SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.2.1.1.2. NORTH AMERICA REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.2.2 NORTH AMERICA MEDICAL ROBOTICS MARKET, BY APPLICATION

8.2.3 NORTH AMERICA MEDICAL ROBOTICS MARKET, BY ENDUSER

8.2.3.1. NORTH AMERICA HOSPITALS MARKET, BY ENDUSER

8.2.4 NORTH AMERICA MEDICAL ROBOTICS, BY COUNTRY

8.2.4.1. USA

8.2.4.1.1. USA MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.2.4.1.1.1. USA ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.2.4.1.1.1.1. USA SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.2.4.1.1.1.2. USA REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.2.4.1.2. USA MEDICAL ROBOTICS MARKET, BY APPLICATION

8.2.4.1.3. USA MEDICAL ROBOTICS MARKET, BY ENDUSER

8.2.4.1.3.1. USA HOSPITALS MARKET, BY ENDUSER

8.2.4.2. CANADA

8.2.4.2.1. CANADA MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.2.4.2.1.1. CANADA ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.2.4.2.1.1.1. CANADA SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.2.4.2.1.1.2. CANADA REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.2.4.2.2. CANADA MEDICAL ROBOTICS MARKET, BY APPLICATION

8.2.4.2.3. CANADA MEDICAL ROBOTICS MARKET, BY ENDUSER

8.2.4.2.3.1. CANADA HOSPITALS MARKET, BY ENDUSER

8.2.4.3. MEXICO

8.2.4.3.1. MEXICO MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.2.4.3.1.1. MEXICO ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.2.4.3.1.1.1. MEXICO SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.2.4.3.1.1.2. MEXICO REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.2.4.3.2. MEXICO MEDICAL ROBOTICS MARKET, BY APPLICATION

8.2.4.3.3. MEXICO MEDICAL ROBOTICS MARKET, BY ENDUSER

8.2.4.3.3.1. MEXICO HOSPITALS MARKET, BY ENDUSER

8.3. EUROPE

8.3.1 EUROPE MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.3.1.1. EUROPE ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.1.1.1. EUROPE SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.1.1.2. EUROPE REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.2 EUROPE MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.3 EUROPE MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.3.1. EUROPE HOSPITALS MARKET, BY ENDUSER

8.3.4 EUROPE MEDICAL ROBOTICS, BY COUNTRY

8.3.4.1. UK

8.3.4.1.1. UK MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.3.4.1.1.1. UK ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.4.1.1.1.1. UK SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.1.1.1.2. UK REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.1.2. UK MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.4.1.3. UK MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.4.1.3.1. UK HOSPITALS MARKET, BY ENDUSER

8.3.4.2. GERMANY

8.3.4.2.1. GERMANY MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.3.4.2.1.1. GERMANY ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.4.2.1.1.1. GERMANY SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.2.1.1.2. GERMANY REHABILITATION ROBOTIC SYSTEMS MARKET, BY

ROBOTIC SYSTEMS

8.3.4.2.2. GERMANY MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.4.2.3. GERMANY MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.4.2.3.1. GERMANY HOSPITALS MARKET, BY ENDUSER

8.3.4.3. FRANCE

8.3.4.3.1. FRANCE MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.3.4.3.1.1. FRANCE ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.4.3.1.1.1. FRANCE SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.3.1.1.2. FRANCE REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.3.2. FRANCE MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.4.3.3. FRANCE MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.4.3.3.1. FRANCE HOSPITALS MARKET, BY ENDUSER

8.3.4.4. SPAIN

8.3.4.4.1. SPAIN MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.3.4.4.1.1. SPAIN ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.4.4.1.1.1. SPAIN SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.4.1.1.2. SPAIN REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.4.2. SPAIN MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.4.4.3. SPAIN MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.4.4.3.1. SPAIN HOSPITALS MARKET, BY ENDUSER

8.3.4.5. ITALY

8.3.4.5.1. ITALY MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.3.4.5.1.1. ITALY ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.4.5.1.1.1. ITALY SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.5.1.1.2. ITALY REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.5.2. ITALY MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.4.5.3. ITALY MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.4.5.3.1. ITALY HOSPITALS MARKET, BY ENDUSER

8.3.4.6. SWEDEN

8.3.4.6.1. SWEDEN MEDICAL ROBOTICS MARKET, BY PRODUCT AND

SERVICE

8.3.4.6.1.1. SWEDEN ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.4.6.1.1.1. SWEDEN SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.6.1.1.2. SWEDEN REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.6.2. SWEDEN MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.4.6.3. SWEDEN MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.4.6.3.1. SWEDEN HOSPITALS MARKET, BY ENDUSER

8.3.4.7. RUSSIA

8.3.4.7.1. RUSSIA MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.3.4.7.1.1. RUSSIA ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.4.7.1.1.1. RUSSIA SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.7.1.1.2. RUSSIA REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.7.2. RUSSIA MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.4.7.3. RUSSIA MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.4.7.3.1. RUSSIA HOSPITALS MARKET, BY ENDUSER

8.3.4.8. NETHERLANDS

8.3.4.8.1. NETHERLANDS MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.3.4.8.1.1. NETHERLANDS ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.4.8.1.1.1. NETHERLANDS SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.8.1.1.2. NETHERLANDS REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.8.2. NETHERLANDS MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.4.8.3. NETHERLANDS MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.4.8.3.1. NETHERLANDS HOSPITALS MARKET, BY ENDUSER

8.3.4.9. BELGIUM

8.3.4.9.1. BELGIUM MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.3.4.9.1.1. BELGIUM ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.4.9.1.1.1. BELGIUM SURGICAL ROBOTIC SYSTEMS MARKET, BY

ROBOTIC SYSTEMS

8.3.4.9.1.1.2. BELGIUM REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.9.2. BELGIUM MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.4.9.3. BELGIUM MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.4.9.3.1. BELGIUM HOSPITALS MARKET, BY ENDUSER

8.3.4.10. REST OF EUROPE

8.3.4.10.1. REST OF EUROPE MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.3.4.10.1.1. REST OF EUROPE ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.3.4.10.1.1.1. REST OF EUROPE SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.10.1.1.2..... REST OF EUROPE REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.3.4.10.2. REST OF EUROPE MEDICAL ROBOTICS MARKET, BY APPLICATION

8.3.4.10.3. REST OF EUROPE MEDICAL ROBOTICS MARKET, BY ENDUSER

8.3.4.10.3.1. REST OF EUROPE HOSPITALS MARKET, BY ENDUSER

8.4. ASIA-PACIFIC

8.4.1 ASIA-PACIFIC MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.4.1.1. ASIA-PACIFIC ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.4.1.1.1. ASIA-PACIFIC SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.4.1.1.2. ASIA-PACIFIC REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.4.2 ASIA-PACIFIC MEDICAL ROBOTICS MARKET, BY APPLICATION

8.4.3 ASIA-PACIFIC MEDICAL ROBOTICS MARKET, BY ENDUSER

8.4.3.1. ASIA-PACIFIC HOSPITALS MARKET, BY ENDUSER

8.4.4 ASIA-PACIFIC MEDICAL ROBOTICS, BY COUNTRY

8.4.4.1. CHINA

8.4.4.1.1. CHINA MEDICAL ROBOTICS MARKET, BY PRODUCT AND SERVICE

8.4.4.1.1.1. CHINA ROBOTIC SYSTEMS MARKET, BY PRODUCT AND SERVICE

8.4.4.1.1.1.1. CHINA SURGICAL ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.4.4.1.1.1.2. CHINA REHABILITATION ROBOTIC SYSTEMS MARKET, BY ROBOTIC SYSTEMS

8.4.4.1.2. CHINA MEDICAL ROBOTICS MARKET, BY APPLICATION

8.4.4.1.3. CHINA MEDICAL ROBOTICS MARKET, BY ENDUSER

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