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North America Orthopedic Navigation Systems Market Forecast to 2030 - Regional Analysis - by Technology (Electromagnetic, Optical, and Others), Application (Knee, Hip, Spine, and Others), and End User (Hospitals, Ambulatory Surgical Centers, and Others)

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Abstracts

The North America orthopedic navigation systems market was valued at US$ 981.11 million in 2022 and is expected to reach US$ 2,937.59 million by 2030; it is estimated to register a CAGR of 14.7% from 2022 to 2030.

Rising Interest in Minimally Invasive Surgery Fuels North America Orthopedic Navigation Systems Market

In minimally invasive spine surgery (MISS), use of computer-assisted navigation technology allows surgeons to better visualize bone and soft tissue anatomy through limited minimally invasive surgery (MIS) incisions. In addition, due to smaller incisions, postoperative wound healing takes longer in conventional surgeries than in MIS. Interest in MISS increases tremendously as its core principle is to minimize insertion-related injuries while achieving similar results to traditional open spine procedures. With technical and technological advances, MISS can expand its utility to simple spinal stenosis and complex spinal pathologies such as metastasis, trauma, or spinal deformity in adults.

In August 2023, Orthofix Medical Inc. announced the full commercial launch and successful completion of the first cases in the US with the 7D FLASH Navigation System Percutaneous Module 2.0. The system enables Orthofix to continue to operate MIS for the spine. Speed, accuracy, and efficiency of image processing technology are expected to provide significant economic added value and reduced radiation exposure

for staff and patients in open procedures. This launch expands the clinical functionality and utility of the navigation system by providing surgeons with a fully integrated procedural solution for MIS, including implant planning and an expanded suite of navigated tools. The growing preference of patients and healthcare professionals for minimally invasive procedures that offer faster recovery times and reduced postoperative pain would support the adoption of orthopedic navigation systems. Thus, the rising adoption of orthopedic navigation systems in practice benefits patients and hospitals, which is expected to boost the North America orthopedic navigation system market growth in the coming years.

North America Orthopedic Navigation Systems Market Overview

The North America orthopedic navigation system market is segmented into the US, Canada, and Mexico. The region holds a significant share of the global market due to growing acceptance of the latest medical device technologies and increasing incidence of spinal disorders. Moreover, the rising prevalence of chronic diseases, upsurging number of sports injury cases, and increasing number of orthopedic procedures and ailments, especially among aging population, propel the market growth. In addition, the Mexican medical tourism sector is likely to offer lucrative opportunities to the orthopedic navigation system market in the region.

According to the United Nations Economic Commission for Europe (UNECE), around 2,740,000 people were injured in traffic accidents in the US in 2019. Additionally, the increasing prevalence of spinal diseases such as degenerative disc disease, spinal stenosis, and herniated discs in the US propels the demand for orthopedic spinal navigation systems. According to the 2021 National Spinal Cord Injury Statistical Center (NSCSC) estimates, 30% of individuals affected by spinal cord injuries are readmitted to hospitals within a year of their injury, with the average hospital stay for those requiring readmission being 22 days. Additionally, according to an article published by the University of Washington in January 2021, traumatic spinal cord injuries affect over 18,000 Americans annually. According to McLeod Health, the number of orthopedic procedures performed in the US was 18.6 million in 2022.

Thus, a rise in number of spinal cord injury cases and orthopedic surgeries and increase in aging population consequently boost the need for orthopedic navigation systems, thereby driving the market in the US.

North America Orthopedic Navigation Systems Market Segmentation

The North America orthopedic navigation systems market is segmented based on technology, application, end user, and country.

Based on technology, the North America orthopedic navigation systems market is segmented into electromagnetic, optical, and others. The electromagnetic segment held the largest share in 2022.

Based on application, the North America orthopedic navigation systems market is segmented into knee, hip, spine, and others. The knee segment held the largest share in 2022.

Based on end user, the North America orthopedic navigation systems market is segmented into membrane hospitals, ambulatory surgical centers, and others. The hospitals segment held the largest share in 2022.

Based on country, the North America orthopedic navigation systems market is categorized into the US, Canada, and Mexico. The US dominated the North America orthopedic navigation systems market in 2022.

DePuy Synthes Inc, Smith & Nephew Plc, Siemens Healthineers AG, B Braun SE, Stryker Corp, Medtronic Plc, Zimmer Biomet Holdings Inc, Metronor AS, and Naviswiss AG are some of the leading companies operating in the North America orthopedic navigation systems market.

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