

# **North America Surgical Navigation Systems Market Forecast to 2030 - Regional Analysis - by Type (Optical Navigation System, Electromagnetic Navigation System, Hybrid Navigation System, Fluroscopy Navigation System, CT-Based Navigation System, and Others), Application (Orthopedic, ENT, Neurology, Dental, and Others), and End User [Hospitals and Ambulatory Surgical Centers (ASCs)]**

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## **Abstracts**

The North America surgical navigation systems market was valued at US\$ 491.88 million in 2022 and is expected to reach US\$ 1,092.95 million by 2030; it is estimated to grow at a CAGR of 10.5% from 2022 to 2030.

Rising Cases of Musculoskeletal and Neurological Disorders Fuel North America Surgical Navigation Systems Market

According to the National Safety Council 2023 report, musculoskeletal disorders (MSDs) are pervasive, affecting nearly one-quarter of the global population, causing tendonitis, carpal tunnel syndrome, ruptured or herniated discs, and sprains. Moreover, the Global Burden of Disease (GBD) report revealed that nearly 1.71 billion people lived with musculoskeletal conditions involving low back pain, neck pain, fractures, osteoarthritis, amputations, and rheumatoid arthritis (RA) in 2019. The rising prevalence of musculoskeletal conditions varies by age and diagnosis, affecting people of all ages worldwide. Therefore, there is a high demand for surgical navigation systems intended for orthopedic surgery. These systems are among the most powerful and enabling tools for surgeons. Surgical navigation systems analyze pre- and post-operative data in multiple versions using augmented reality (AR) to improve clinical outcomes of orthopedic surgeries. For example, visualization systems allow surgeons to take

suitable positions during surgeries without excessive exposure to X-ray radiation. For instance, in March 2023, Stryker launched the "Ortho Q Guidance System" that enables advanced surgical planning and guidance intended for hip and knee procedures for the benefit of surgeons. Ortho Q was explicitly designed for orthopedic customers to enhance orthopedic surgeons' capability for proper precision while performing surgeries. The product includes features such as Implant Agnostic Software, Triathlon Implant Dedicated Software, and Small Footprint. Further, the WHO report in 2023 states that at least 1 in 3 people of all ages will suffer from neurological disorders once in their lifetime, making it the highest among all noncommunicable diseases. Navigation systems for neurological procedures assist in a range of procedures, from intracranial tumor resections to frameless biopsies and from pedicle screw placement to spinal stabilization. For example, in skull openings (small craniotomies), neuronavigation systems display anatomical structures and track the virtual axis of surgical instruments.

Medtronic provides innovative surgical navigation systems and related products for neurosurgery, spinal surgery, and cranial surgery. Its StealthStation S8 Surgical Navigation System comprises an intuitive interface that aids advanced visualization to navigate neurosurgery procedures. The system provides optical and electromagnetic (EM) tracking capabilities with the help of external devices such as microscopes and ultrasound, thus acting as a powerful tool for neurosurgical procedures. Therefore, the need for effective surgical treatments for orthopedic and neurosurgery with the rising cases of musculoskeletal and neurological disorders, coupled with innovative product launches by top companies, propels the adoption of surgical navigation systems globally.

#### North America Surgical Navigation Systems Market Overview

The North America surgical navigation systems market has been segmented into the US, Canada, and Mexico. The market growth in this region is attributed to the rising surgeries, acting as a standalone factor positively influencing the growth of the market. Additionally, technological advancements in surgical monitoring devices further enhances the overall market growth during the forecast period.

North America held the largest market share for surgical navigation systems market in 2022. The rising cases of musculoskeletal and neurological disorders and integration of advanced type with surgical navigation systems are among the prominent factors propelling the market growth are the key factors driving the growth of surgical navigation systems in North America region. Market players are launching new products to the market. For instance, in July 2023, Stryker, announced launching of "Ortho Q Guidance System" that enables advanced surgical planning and guidance for hip and knee procedures, easily controlled by the surgeon from the sterile field. The system combines new optical tracking options through a designed, state-of-art camera with sophisticated

algorithms of the newly launched Ortho Guidance software that delivers surgical planning and guidance capabilities.

North America Surgical Navigation Systems Market Revenue and Forecast to 2030 (US\$ Million)

North America Surgical Navigation Systems Market Segmentation

The North America Surgical Navigation Systems Market is segmented based on type, application, end user, and country.

Based on type, the North America surgical navigation systems market is segmented into optical navigation system, electromagnetic navigation system, hybrid navigation system, fluoroscopy navigation system, CT-based navigation system, and other navigation system. The electromagnetic navigation system segment held the largest North America surgical navigation systems market share in 2022.

In terms of application, the North America surgical navigation systems market is categorized into orthopedic, ENT, neurology, dental, and others. The orthopedic segment held the largest North America surgical navigation systems market share in 2022.

By end user, the North America surgical navigation systems market is bifurcated into hospitals and ASCs. The hospitals segment held a larger North America surgical navigation systems market share in 2022.

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

B Braun SE, Corin Group, DePuy Synthes Inc, GE HealthCare Technologies Inc, Medtronic Plc, Siemens Healthineers AG, Stryker Corp, and Zimmer Biomet Holdings Inc are some of the leading companies operating in the North America surgical navigation systems market.

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