

Surgical Navigation Systems Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis Report Coverage: By Type (Optical Navigation System, Electromagnetic Navigation System, Hybrid Navigation System, Fluoroscopy Navigation System, CT-Based Navigation System, and Others), Application (Orthopedic, ENT, Neurology, Dental, and Others), End User [Hospitals, Ambulatory Surgical Centers (ASCs), and Others], and Geography (North America, Europe, Asia Pacific, South & Central America, and Middle East & Africa)

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Abstracts

According to our new research study on “Surgical Navigation System Market Size and Forecast to 2030 – Global and Regional Analysis – by Type, Application, and End User,” the market is expected to grow from US\$ 1.139 billion in 2022 to US\$ 2.458 billion by 2030; it is estimated to record a CAGR of 10.09% during 2022–2030. The rising cases of musculoskeletal and neurological disorders and the integration of advanced technology with surgical navigation systems are the driving factors of surgical navigation system market.

Surgical navigation technology guides the surgeon's movements and shows the position of each instrument and anatomical structure in real time by projecting the tools onto preoperative imaging data. It finds its applications in orthopedics, ENT, neurology, and

other surgical disciplines. Real-time observations are made using an MRI, scanner, video camera, or other imaging techniques. Navigation data are integrated into the image to assist the surgeon in determining the exact place within the body of the patient.

Rising Cases of Musculoskeletal and Neurological Disorders are boosting the Market Growth:

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. Moreover, high-income countries are the most affected by musculoskeletal conditions, accounting for 441 million, followed by countries in the World Health Organization (WHO), the Western Pacific region with 427 million, and the Southeast region with 369 million. 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.

Additionally, 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.

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.

Market Trend

Advent of Robotic Navigation Emerges as Key Trend

Surgical robotic navigation provides benefits to surgeons in precisely aligning surgical instruments and screws. Additionally, the real-time visualization of instrument positioning and imaging compatibility enables high accuracy for surgeons while performing procedures through the navigation system. Several top companies plan to launch innovative robotic surgical navigation platforms. Globus Medical offers a Multifunctional Robotics + Navigation platform designed to improve surgical accuracy and optimize patient care with the use of robotics and navigation. Axis Spine Center's surgical navigation robot is connected to a camera with which the robot can process the view captured by the camera using the CT image in real time. The robot can also change position upon patients' movement to ensure a precise placement of the surgical instrument. Despite developments in robotic surgical navigation, further studies are necessary to determine the efficacy, efficiency, and safety of new combined surgical robotic navigation systems/platforms.

Application-Based Insights

By application, the surgical navigation system market is segmented into orthopedic, ENT, neurology, dental, and others. The orthopedic segment is further segmented into knee replacement procedures and hip replacement procedures. The orthopedic segment held the largest market share in 2022 owing to the rising orthopedic surgeries. Computer- and robot-assisted navigation is expected to continue to play an increasingly important role in helping patients' outcomes and lengthen the life of their implants as these procedures become increasingly common. The orthopedic surgery navigation system or the orthopedic surgical robot is designed to use a patient's preoperative/intraoperative imaging data to plan the surgical path and then guide the doctor to complete the planned surgical path using the robotic arm's guiding function. The navigation system also captures joint range of motion, laxity, and kinematics intraoperatively. HipNav is an image-guided surgical navigation system used in hip replacement surgery. With this system, prosthetic components can be measured and guided during total hip replacement surgery (THR). The system consists of a 3-dimensional preoperative planner, a simulator, and an intraoperative surgical navigator. The orthopedic segment is further classified into knee replacement and hip replacement.

End User-Based Insights

The surgical navigation systems market, by end user, is categorized as hospitals and ambulatory surgical centers (ASCs). The hospital segment held the largest share of the market in 2022 and is anticipated to register the highest CAGR during 2022-2030.

Surgical navigation systems are routinely used in orthopedic, neurology, and other surgeries to reach the target place more precisely. Hospitals are a vital part of the development of health systems. They play an important role in offering support to other healthcare providers. An increasingly large number of hospitals is attaining expertise to use surgical navigation systems for surgeries. With the rising number of surgeries, the use of surgical navigation is expected to increase in hospital settings. Moreover, the rising number of hospitals worldwide is expected to continue the dominance of the hospitals segment in the North America surgical navigation market during the forecast period.

Ambulatory surgical centers, or ASCs, are modern healthcare facilities that offer same-day surgical procedures, including diagnostic and preventive procedures. ASCs are witnessing growth in open and minimally invasive surgeries that demand surgical navigation systems. ASCs have become an integral part of the healthcare system. The demand for ASCs was witnessed at a larger scale, especially during the COVID-19 pandemic. The rising number of spine surgery techniques is allowing increasingly complicated procedures to be carried out on an outpatient basis, making ambulatory surgery centers (ASCs) an enticing option for many spine surgeons. Hence, the rising adoption of surgical navigation for spine surgeries in the ASC setting, coupled with the increasing number of surgeons carrying out surgeries, is projected to propel the growth of this segment.

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12.2.3 Products and Services

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12.3 Medtronic Plc

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13. APPENDIX

13.1 About Us

13.2 Glossary of Terms

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