

Southeast Asia Surgical Robotics Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Computer-assisted robotics used in surgery is known as surgical robotics, and is designed to assist surgeons in achieving minimally invasive surgeries with greater precision, control, and flexibility than traditional methods. These systems usually involve robotic arms, cameras, and consoles that interpret the movements of the surgeon's hand into extremely precise movements within the body of a patient.

The Southeast Asian Surgical Robotics market is expected to exhibit a growth rate of 18.37% during the forecast period (2025-2033F). Adoption is being driven by increased demand in minimally invasive surgeries, rapid growth of privately owned hospitals, and the development of medical tourism destinations in Thailand and Singapore, among others. The market is further propelled by supportive healthcare investments, rising disposable income, and regulatory support. Moreover, the rising introduction of technological innovations drives the growth of the market.

For example, on January 15, 2025, Southeast Asia, St. Luke's Medical Center launched the region's first robotic cardiac surgery program. This historic initiative was made possible through a collaborative effort between St. Luke's multidisciplinary team and the expert team from West Virginia University's (WVU) Heart and Vascular Institute, and a physician assistant.

The program debuted with a series of innovative robotic-assisted cardiac procedures, showcasing the transformative potential of this advanced technology.

Based on product type, the market is segmented into robotic systems, instruments and accessories, and services. Among these, the robotic systems market held the largest share in 2024 as hospitals invest in new robotic systems

to improve surgical accuracy. Their use becomes the source of demand for complementary services and accessories, generating repeat revenue for businesses. Such a solid foundation of installations provides installers with long-term growth prospects both globally and regionally. The demand for surgical robots that support more precise procedures has been growing, and they are being utilized across a wide range of medical specialties. On November 6, 2024, Sysmex Corporation announced that the first overseas surgery (robot-assisted radical prostatectomy) using the 'hinotori Surgical Robot System' (hinotori) was successfully performed at Singapore General Hospital.

Based on application, the Southeast Asian Surgical Robotics market is segmented into general surgery, urology surgery, gynecology surgery, orthopedic surgery, and others. Among these, the urology surgery market held a significant share in 2024. The surgical robotics in the area are primarily focused on urology surgery, where prostatectomies and kidney surgeries are the most sensitive to robotic accuracy. The ongoing high demand in this market is compelling hospitals to focus on robotic investments. This specialization also offers firms a consistent adoption channel even as they venture into other surgical fields. For example, on April 24, 2025, Southeast Asia etched its name into the annals of surgical history with the successful completion of the first-ever telesurgery on a human patient using the Mantra Surgical Robot. This monumental achievement not only marks a new era for the region but also sets the stage for a global shift toward accessible, precise, and remotely operated surgical procedures.

Based on application, the Southeast Asian Surgical Robotics market is segmented into hospitals, ambulatory surgical centers (ASCs), and others. Among these, the ambulatory surgical centers (ASCs) market is expected to grow at the highest CAGR during the forecast period (2025-2033F) due to cost-sensitive patients and medical care providers preferring faster and more cost-effective robotic surgeries. Their growth creates opportunities for compact and modular robot platforms that are more suitable for smaller systems. This trend drives companies to develop low-cost systems to expand their use to new healthcare models.

For a better understanding of the market adoption of the Southeast Asian Surgical Robotics market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, and the Rest of Southeast Asia. Vietnam is expected to grow at a

significant CAGR in the market, which is backed by government healthcare modernization initiatives, increasing levels of private investments, and rapid development of hospital infrastructure. Adding to this, robotic adoption is gaining considerable momentum with an increasing population of middle-class people who require high-end minimally invasive therapy. The digital healthcare and technology adoption drive sweeping across the country provides an ideal environment where the robotic system can be implemented. For companies, Vietnam presents a high-growth frontier that can guarantee strategic positioning for long-term investment in Southeast Asia. For instance, on July 29, 2025, a major breakthrough in Vietnam's neurological treatment was achieved as doctors at Vinmec Central Park International Hospital successfully performed surgery on a 9-year-old boy with drug-resistant epilepsy, utilizing the AutoGuide™ robotic Guidance system for SEEG implantation.

Some major players running in the market include Medtronic, Device Technologies, Sysmex Corporation, Vivo Surgical Private Limited, Stryker, EndoMaster Pte Ltd, NDR Medical Technology, Medical Device Business Services, Inc. (Johnson & Johnson), SIIX-AGT MEDTECH PTE LTD. (SIIX Corporation), and Mediaroid Corporation.

Contents

1 MARKET INTRODUCTION

- 1.1. Market Definitions
- 1.2. Main Objective
- 1.3. Stakeholders
- 1.4. Limitation

2 RESEARCH METHODOLOGY OR ASSUMPTIONS

- 2.1. Research Process of the Southeast Asia Surgical Robotics Market
- 2.2. Research Methodology of the Southeast Asia Surgical Robotics Market
- 2.3. Respondent Profile

3 EXECUTIVE SUMMARY

- 3.1. Industry Synopsis
- 3.2. Segmental Outlook
 - 3.2.1. Market Growth Intensity
- 3.3. Country Outlook

4 MARKET DYNAMICS

- 4.1. Drivers
- 4.2. Opportunity
- 4.3. Restraints
- 4.4. Trends
- 4.5. PESTEL Analysis
- 4.6. Demand Side Analysis
- 4.7. Supply Side Analysis
 - 4.7.1. Merger & Acquisition
 - 4.7.2. Investment Scenario
 - 4.7.3. Industry Insights: Leading Startups and Their Unique Strategies

5 PRICING ANALYSIS

- 5.1. Price Influencing Factors

6 SOUTHEAST ASIA SURGICAL ROBOTICS MARKET REVENUE (USD MN), 2023-2033F

7 MARKET INSIGHTS BY PRODUCT TYPE

- 7.1. Robotic Systems
- 7.2. Instruments and Accessories
- 7.3. Services

8 MARKET INSIGHTS BY APPLICATION

- 8.1. General Surgery
- 8.2. Urology Surgery
- 8.3. Gynecology Surgery
- 8.4. Orthopedic Surgery
- 8.5. Others

9 MARKET INSIGHTS BY END USER

- 9.1. Hospitals
- 9.2. Ambulatory Surgical Centers (ASCs)
- 9.3. Others

10 MARKET INSIGHTS BY COUNTRY

- 10.1. Indonesia
- 10.2. Thailand
- 10.3. Philippines
- 10.4. Vietnam
- 10.5. Malaysia
- 10.6. Rest of Southeast Asia

11 VALUE CHAIN ANALYSIS

- 11.1. Marginal Analysis
- 11.2. List of Market Participants

12 COMPETITIVE LANDSCAPE

- 12.1. Competition Dashboard
- 12.2. Competitor Market Positioning Analysis
- 12.3. Porter Five Forces Analysis

13 COMPANY PROFILES

- 13.1. Medtronic
 - 13.1.1. Company Overview
 - 13.1.2. Key Financials
 - 13.1.3. SWOT Analysis
 - 13.1.4. Product Portfolio
 - 13.1.5. Recent Developments
- 13.2. Device Technologies
- 13.3. Sysmex Corporation
- 13.4. Vivo Surgical Private Limited
- 13.5. Stryker
- 13.6. EndoMaster Pte Ltd
- 13.7. NDR Medical Technology
- 13.8. Medical Device Business Services, Inc. (Johnson & Johnson)
- 13.9. SIIX-AGT MEDTECH PTE LTD. (SIIX Corporation)
- 13.10. Mediaroid Corporation

14 ACRONYMS & ASSUMPTIONS

15 ANNEXURE

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