

Southeast Asia Thoracolumbar Spinal Fusion Implant Market: Current Analysis and Forecast (2025-2033)

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Abstracts

A thoracolumbar spinal fusion implant is used to provide structural stability to the middle and lower parts of the spine in case of fusion surgery. These implants are used to correct deformities, alleviate pain, and stabilize the body on a long-term basis after an injury or illness.

The Southeast Asian Thoracolumbar Spinal Fusion Implant market is expected to exhibit a growth rate of 5.0% during the forecast period (2025-2033F). The rising incidence of spinal trauma, the growing demand for minimally invasive surgeries, and the widespread modernization of health care processes in the region are driving market growth. Advanced imaging, navigation, and robotics are being implemented in hospitals, thereby increasing demand for compatible implant systems. The growing number of aging populations, rising degenerative back disorders caused by lifestyle issues, and the wave of more health insurance coverage also contribute to the rising volumes of surgery. The increasing shift toward biocompatible implants, such as titanium and PEEK, also reinforces the adoption of the next-generation thoracolumbar fusion implants.

Based on product type, the market is segmented into pedicle screws, intervertebral body fusion device (IBFD), rods, plates & fixation systems, and others. Among these, the pedicle screws thoracolumbar spinal fusion implant market held the largest share in 2024. Pedicle screws contribute to market growth because they are the primary fixation element used in thoracolumbar fusion surgeries and provide stability and a predictable clinical outcome. Their high utilization rate in trauma, deformity, and degenerative cases still provides a base for maintaining demand for the core implant systems. Moreover, surgeons and hospitals are moving towards newer systems at an accelerated rate as

companies become more innovative in biomechanics and design to make them MIS-compatible.

Based on surgery type, the Southeast Asian thoracolumbar spinal fusion implant market is segmented into open surgery and minimally invasive surgery. Among these, the minimally invasive surgery segment is expected to grow at a significant CAGR during the forecast period (2025-2033). Minimally invasive surgery hastens the adoption because Southeast Asian hospitals are moving towards shorter recovery rates and lower rates of surgical morbidity. This drives demand for low-profile screws, expandable cages, and navigation-ready implants designed to suit the MIS workflow. Also, companies with simplified MIS systems, instrumentation packages, and training programs achieve accelerated acceptance among surgeons and individual healthcare systems. On June 29, 2022, NuVasive, Inc., the leader in spine technology innovation, focused on transforming spine surgery with minimally disruptive, procedurally integrated solutions, announced the grand opening of its Singapore Experience Center for the Asia-Pacific region, supporting the Company's growth strategy to globalize its business.

Based on material, the market is segmented into titanium, polyether-ether-ketone (PEEK), stainless steel, and others. Among these, the titanium thoracolumbar spinal fusion implant market is expected to grow at a significant CAGR during the forecast period (2025-2033). This is mainly due to its high biocompatibility, high strength-to-weight ratio, and compatibility with 3D-printed implant designs. It is the most reliable material for screws, rods, and cages in the fusion procedure preferred in Southeast Asia. As companies further develop titanium-based product lines and add additive-manufactured versions, both advanced and mid-tier hospitals are increasingly involved in adoption.

Based on indication, the market is segmented into degenerative disc disease, spinal trauma, spinal deformities, spinal tumors, and others. Among these, the spinal trauma segment is expected to grow at a significant CAGR during the forecast period (2025-2033). This is mainly due to the high rates of road accidents and occupational injuries in the Southeast Asia region, which result in a rise in the surgical intervention rates. Trauma patients also require immediate stabilization, which increases demand for pedicle screws, rods, and fixation systems. The adoption of trauma-oriented systems, quick-deployment instrumentation, and inexpensive implantable devices is gaining greater acceptance in both community and privately operated hospitals. According to

the World Health Organization, the incidence of TSI ranged from 3.4 per 100,000 in Europe to 13.7 per 100,000 in Southeast Asia and 54 cases per million in the United States of America.

Based on end use, the Southeast Asian Thoracolumbar Spinal Fusion Implant market is segmented into hospitals, ambulatory surgical centers, and orthopedic clinics. Among these, the hospitals segment held the dominant share of the Southeast Asia Thoracolumbar Spinal Fusion Implant market in 2024. Hospitals are the most dominant in the adoption, as they perform most thoracolumbar fusions, are supported by larger budgets, have specialized staff, and high-tech imaging facilities. Their procurement policies have a direct impact on implant preference, including favoring the high-end MIS system over conventional screw-rod constructs. With the increase in spine departments, robotics, and trauma care investments in hospitals, businesses are gaining access to recurring demand and long-term supply agreements. On September 5, 2024, Medtronic plc, a global leader in healthcare technology, expanded the capabilities of Medtronic Customer eXperience Center (MCXC) in Singapore with the opening of its first Robotics Experience Studio in Southeast Asia. This underscores the commitment of Medtronic to enhance access to new technologies through collaboration, training, and education within the healthcare ecosystem.

For a better understanding of the market adoption of the Southeast Asian Thoracolumbar Spinal Fusion Implant market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Vietnam is expected to grow at a significant CAGR during the forecast period (2025-2033). Vietnam is a booming market due to rapid healthcare modernization, high economic growth, and a growing number of specialized spine surgeons. Hospitals are enhancing their surgical facilities with navigation and MIS tooling, and are rapidly embracing the newer implants. Also, the rising cases of spinal trauma, industrial growth, and road accidents are increasing the demand for spinal fixation devices. Moreover, orthopedics and neurosurgery are heavily invested in by private hospital chains, which allows companies with premium and mid-tier product portfolios. The long-term market perspective is strengthened as the trend moves towards improving the quality of titanium and PEEK-based implants, driven by increased patient awareness and insurance coverage. On December 18, 2024, The Spineway Group, a specialist in innovative implants for the treatment of severe spine disorders, announced that it has obtained approvals for its ACIFBOX, VEOS, KAPHORN, and TWIN

PEAKS ranges in Vietnam. Following this approval, initial orders have been placed, confirming the growing interest in Spineway products in the region. These approvals will enable Spineway to meet the needs of Vietnamese surgeons by offering high-performance solutions adapted to local requirements.

Some major players running in the market include Medtronic, SiS medical Co., Ltd., B. Braun SE, DePuy Synthes (Johnson & Johnson), Stryker, Globus Medical, Double Medical Technology Inc., A-SPINE Asia Co., Ltd., Siora Surgical Pvt. Ltd., MEDYSSEY USA, INC.

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 Thoracolumbar Spinal Fusion Implant Market
- 2.2. Research Methodology of the Southeast Asia Thoracolumbar Spinal Fusion Implant 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 THORACOLUMBAR SPINAL FUSION IMPLANT MARKET REVENUE (USD MN), 2023-2033F

7 MARKET INSIGHTS BY PRODUCT TYPE

- 7.1. Pedicle Screws
- 7.2. Intervertebral Body Fusion Device (IBFD)
- 7.3. Rods
- 7.4. Plates & Fixation Systems
- 7.5. Others

8 MARKET INSIGHTS BY SURGERY TYPE

- 8.1. Open Surgery
- 8.2. Minimally Invasive Surgery

9 MARKET INSIGHTS BY MATERIAL

- 9.1. Titanium
- 9.2. Polyether-Ether-Ketone (PEEK)
- 9.3. Stainless Steel
- 9.4. Others

10 MARKET INSIGHTS BY INDICATION

- 10.1. Degenerative Disc Disease
- 10.2. Spinal Trauma
- 10.3. Spinal Deformities
- 10.4. Spinal Tumors
- 10.5. Others

11 MARKET INSIGHTS BY END USE

- 11.1. Hospitals
- 11.2. Ambulatory Surgical Centers
- 11.3. Orthopedic Clinics

12 MARKET INSIGHTS BY COUNTRY

- 12.1. Indonesia
- 12.2. Thailand
- 12.3. Philippines
- 12.4. Vietnam
- 12.5. Malaysia
- 12.6. Singapore
- 12.7. Rest of Southeast Asia

13 VALUE CHAIN ANALYSIS

- 13.1. Marginal Analysis
- 13.2. List of Market Participants

14 COMPETITIVE LANDSCAPE

- 14.1. Competition Dashboard
- 14.2. Competitor Market Positioning Analysis
- 14.3. Porter Five Forces Analysis

15 COMPANY PROFILES

- 15.1. Medtronic
 - 15.1.1. Company Overview
 - 15.1.2. Key Financials
 - 15.1.3. SWOT Analysis
 - 15.1.4. Product Portfolio
 - 15.1.5. Recent Developments
- 15.2. SiS medical Co., Ltd.
- 15.3. B. Braun SE
- 15.4. DePuy Synthes (Johnson & Johnson)
- 15.5. Stryker
- 15.6. Globus Medical
- 15.7. Double Medical Technology Inc.
- 15.8. A-SPINE Asia Co., Ltd.
- 15.9. Siora Surgical Pvt. Ltd.
- 15.10. MEDYSSEY USA, INC.

16 ACRONYMS & ASSUMPTIONS

17 ANNEXURE

I would like to order

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