

Cardiac and Lung Surgical Robots Market Shares, Strategies, and Forecasts, Worldwide, 2015 to 2021

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Abstracts

LEXINGTON, Massachusetts (December 9, 2015) – WinterGreen Research announces that it has published a new study Cardiac and Lung Surgical Robots: Market Shares, Strategy, and Forecasts, Worldwide, 2015 to 2021. The 2015 study has 223 pages, 85 tables and figures. Worldwide Cardiac and Lung surgical robot markets are poised to achieve significant growth as next generation systems provide a way to improve traditional open surgery and decrease the number of ports needed for minimally invasive surgery.

The automated process revolution in surgery and communications is being implemented via robots. Robots automation of systems is providing significant improvement in the accuracy of surgery and the repeatability of process.

Intuitive Surgical owns the market as the major participant with compelling market share in cardiac and lung surgical robots. This leadership position will need to be defended as other vendor products, now in clinical trials come to market. Advanced technology, an installed base and a well trained core group of surgeons give Intuitive Surgical market advantage.

Patients for some types of procedures fare better when the heart or lung surgery is done by surgical robots. The documentation of improvements in care delivery, the ability to ensure better outcomes from surgery promise that cardiac and lung surgical robotics is a strong growth market. Heart disease is still the largest disease worldwide. The issue for cardiac and lung robotic surgery is that so many heart patients exist.

Every leading surgeon working to perform heart and lung robotic surgery has worked to be accepted to practice at a hospital that has those robotic devices. The really talented

surgeons depend on hospitals having the cardiac robotic equipment. In order to attract physicians and patients, the hospitals have to purchase the surgical equipment.

The market penetration of the cardiac and lung surgical robots will go to 100 percent in the US top hospitals within five years. As the surgeons migrate to the places that have the robotic surgical equipment, other hospitals and their potential patient populations notice. If the hospital does not have the surgical robotic equipment, it will not have any surgeons, this is a bad situation for a hospital. The cardiac and lung robotic surgical equipment permits better surgery and the surgeons and patients know this.

Cardiac and lung robotic surgery is poised to eclipse open surgery. It is used in the categories of lobectomy, thoracic revascularization, and mitral valve repair surgery. Surgical robots are positioned to become the standard of care for hospitals in the delivery of some heart surgery. The emerging group of several surgical robotic companies will collectively have enough marketing dollars and enough marketing clout to drive replacement of virtually all open cardiac and lung surgery.

Larger hospitals that can afford the expenditure are adopting heart and lung robotic surgical devices to improve their outcomes numbers. Hospitals are measured on outcomes, robots for surgery, when used by a trained physician are improving outcomes significantly. Hospital robotic systems have an emphasis on outcomes improvement during surgery. This has resulted in investment in robotics technology that is useful, and achieves positive patient outcomes.

Technology is enhancing a wide variety of procedures in many cardiac surgical specialties. Cardiac and thoracic surgeons at leading hospitals use robotic surgical systems increasingly. The aim is to perform more of the one-hundred thousand MIS surgical procedures of various types using robots. The surgeries performed by robot include cardiothoracic and vascular surgery. These surgical applications are cleared by the FDA.

The technology uses metal tubes attached to the arms are inserted through the ports, and the cutting and visualization instruments are introduced through the tubes into the patient's body. The surgeon performs the procedure while sitting at a console, manipulating the instrument controls and viewing the operation through a vision system. When a surgeon needs to change an instrument the instrument is withdrawn from the surgical field using the controls at the console and the nursing assistants switch instruments as per the physician instruction. This is done many times during an operation.

The cardiac and lung surgical robot market is characterized enormous variety and innovation. A surgical robot recurring revenue business model is essentially a large one time purchase for a system complimented by replaceable or disposable instruments that cumulatively make the market a much larger and sustainable ongoing market. Vendors make money from the one time sale of a system and recurring revenue from sale of devices used in every operation.

Initially, a vendor sells and installs the surgical system into new customer accounts. Once systems are sold into customer accounts, the vendor generates recurring revenue as customers use the system to perform surgery. To do cardiac and lung robotic surgeries, the customers need to buy and consume instruments and accessory products. Vendors also generate recurring revenue from system service.

According to Susan Eustis, lead author of the study, “Existing open cardiac and lung surgery can be replaced in some part by robotic surgery during the forecast period. Cardiac and lung robotic surgical approaches complement existing open surgery techniques. Soon, all surgery will be undertaken with at least come aspects of robotic surgery replacing or complementing open surgery.”

The aging US population has supported demand, since the occurrence of health issues that require medical devices is higher in the elderly population. Buoyed by strong demand and sales, industry profit margins have increased considerably during the past five years.

Hospitals are adopting robotic surgical devices to improve their outcomes numbers. Hospitals are measured on outcomes, robots for surgery, when used by a trained physician are improving outcomes significantly. Hundreds of universities worldwide have research programs in robotics and many are awarding degrees in robotics. These “roboticists” are increasingly being hired by Global 2000 organizations to link mobile robots (mobile computers) into existing IT systems. Robot-assisted surgery gives the surgeon better control over the surgical instruments and a better view of the surgical site. Surgeons no longer have to stand throughout the surgery and do not tire as quickly.

Hand tremors are filtered out by the robot’s computer software. The surgical robot can continuously be used by rotating surgery teams. 3D viewing of the surgical site on a large screen improves visualization of the surgical operating field.

Cardiac and lung surgical robot device markets at \$72.2 million in 2014 are anticipated to reach \$2.2 billion by 2021 as next generation devices, systems, and instruments are introduced to manage surgery through small ports in the body instead of large open wounds.

The complete report provides a comprehensive analysis including procedure numbers, units sold, market value, forecasts, as well as a detailed competitive market shares and analysis of major players' success, challenges, and strategies in each segment and sub-segment. The reports cover markets for Cardiac and Lung robotic surgery medical specialties and sub-specialties.

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Contents

HEART AND LUNG SURGICAL ROBOT EXECUTIVE SUMMARY

Heart and Lung Surgical Robot Market Driving Forces
Surgical Robotics Market Driving Forces
Cardiac Surgical Robot Key Procedures As Elements Of Strategy
Cardiac and Lung Surgical Robots Market Share Analysis
Cardiac and Lung Surgical Robot Market Forecasts

1. CARDIAC SURGICAL ROBOT MARKET DESCRIPTION AND MARKET DYNAMICS

1.1 Cardiac Robotic Surgical Clinical Applications
1.1.1 Robotic Cardiothoracic Surgery
1.1.2 Mitral Valve Repairs Are Preferred Over Mitral Valve Replacement
1.1.3 Mitral Valve Repair
1.1.4 Mitral Valve Replacement Possible Complications
1.2 Interventional Cardiologists Treatments and Procedures
1.3 Robotic Internal Thoracic Artery Dissection
1.3.1 Robotic Thoracoscopy
1.3.2 Cardiothoracic Surgery
1.4 Surgical Robotic Lobectomy
1.5 Robotic Coronary Artery Bypass

2. HEART AND LUNG SURGICAL ROBOT MARKET SHARES AND MARKET FORECASTS

2.1 Heart and Lung Surgical Robot Market Driving Forces
2.1.1 Surgical Robotics Market Driving Forces
2.1.1 Cardiac Surgical Robot Key Procedures As Elements Of Strategy
2.2 Cardiac and Lung Surgical Robots Market Share Analysis
2.2.1 Intuitive Surgical da Vinci Surgical System Is Food and Drug Administration (FDA) Approved Cardiac and Lung Robotic System
2.2.2 Corindus
2.2.3 MedRobotics
2.3 Cardiac and Lung Surgical Robot Market Forecasts
2.4 Cardiac and Lung Surgical Robot Installed Systems and Procedure Volumes by Country

- 2.5 Key Players In The Global Medical Surgical Robots Market
- 2.6 Robotic Surgery Equipment Prices
 - 2.1.2 Intuitive Surgical da Vinci Surgical System Prices
- 2.7 Cardiac and Lung Robotic Surgery Equipment Regional Market Segments
 - 2.7.1 Intuitive Surgical Regional Revenue
 - 2.7.2 Intuitive Surgical European Demand
 - 2.7.3 Intuitive Surgical in Japan
 - 2.7.4 U.S. Robotic Surgical Procedures
 - 2.7.5 BRIC (Brazil, Russia, India, China) countries
 - 2.7.6 Aging Taiwanese Population
 - 2.7.7 Korea Focusing On Creating A Growth Engine In Research & Development
 - 2.7.8 Korea
 - 2.7.9 Brazil
 - 2.7.10 Chinese Imported Surgical Robots
 - 2.7.11 Chinese Development of Surgical Robots
- 2.8 Chinese Robotic Cardiac Surgery
 - 2.8.1 Chinese Robotic Cardiac Team Recognized As One Of World's Best

3. CARDIAC SURGICAL ROBOTS PRODUCT DESCRIPTIONS

- 3.1 Intuitive Surgical Cardiothoracic Surgeries
 - 3.1.1 Intuitive Surgical da Vinci Surgical System
 - 3.1.2 Intuitive Surgical Da Vinci Minimally Invasive Surgical Product
 - 3.1.3 Intuitive Surgical Cardiac Surgery
 - 3.1.4 Intuitive Surgical da Vinci Surgical System Components
 - 3.1.5 Intuitive Surgical Patient-Side Cart and Electromechanical Surgical Arms
 - 3.1.6 Intuitive Surgical 3-D Vision System
 - 3.1.7 Intuitive Surgical Firefly Fluorescence Imaging
 - 3.1.8 Intuitive Surgical. da Vinci Surgical System EndoWrist Instruments
 - 3.1.9 Intuitive Surgical Instruments and Accessories
 - 3.1.10 Intuitive Surgical da Vinci Single-Site
 - 3.1.11 Intuitive Surgical EndoWrist One Vessel Sealer
 - 3.1.12 Intuitive Surgical da Vinci Skills Simulator
- 3.2 Titan Medical
- 3.3 Johnson & Johnson
 - 3.3.1 Johnson & Johnson Ethicon
- 3.4 MedRobotics
 - 3.4.1 Medrobotics Flex Retractor
 - 3.4.2 Medrobotics Flexible Robot Platform

3.4.3 Medrobotics Snakelike Robots for Oropharynx, Hypopharynx and Larynx Surgery116

3.5 Corindus

3.5.1 CorPath Robotic Angioplasty

3.5.2 Corindus Command. Control CorPath 200 System

3.5.3 Corindus Standard in Precision PCI

3.5.4 Robotic Angioplasty/Interventional Cardiology

3.6 Changzhou Kangxin Medical Instruments Co., Ltd.

3.7 Guangzhou Baitang Medical Instrument Co., Ltd.

4. CARDIAC SURGICAL ROBOTS TECHNOLOGY AND RESEARCH

4.1 Intuitive Surgical Da Vinci Computerized Technology For Surgery

4.2 Intuitive Surgical da Vinci Xi Surgical System Minimally Invasive Surgery

4.2.1 Intuitive Surgical da Vinci Surgical System

4.3 Third Party Reimbursement

5. CARDIAC AND LUNG SURGICAL ROBOTS COMPANY DESCRIPTIONS

5.1 Chinese Surgical Robots

5.2 Corindus

5.2.1 Corindus Benefits of CorPath Robotic-Assisted PCI

5.2.2 Corindus Improves Staff Position in the Room

5.3 Freehand

5.3.1 Freehand 2010/Prosurgics

5.4 Intuitive Surgical

5.4.1 Intuitive Surgical Robotics da Vinci Surgical System

5.4.2 Intuitive Surgical Robotics da Vinci Surgical System Xi

5.4.3 Intuitive Surgical Business Strategy

5.4.4 Intuitive Surgical Systems

5.4.5 Intuitive Surgical Patient Value As Equal To Procedure Efficacy/Invasiveness

5.4.6 Intuitive Surgical Business Model

5.4.7 Intuitive Surgical Revenue

5.4.8 Intuitive Surgical Regulatory Activities

5.4.9 Intuitive Surgical Economic Environment.

5.5 Johnson and Johnson/DePuy Synthes

5.5.1 Google Collaborating With Johnson & Johnson To Develop Surgical Robots

5.5.2 DePuy

5.5.3 Johnson & Johnson

- 5.5.4 Johnson & Johnson/Ethicon
- 5.6 Medrobotics
 - 5.6.1 Medrobotics Closes On \$10 Million Financing
 - 5.6.2 Medrobotics Several Generations Of Snake Robot Platforms
 - 5.6.3 Medrobotics Advances Clinical Development of Snake Robot for Surgery
 - 5.6.4 Medrobotics Positioning
 - 5.6.5 Medrobotics Cardiac Surgery Gold Standard
 - 5.6.6 Medrobotics Snake Robot Technologies For Use In A Wide Range Of Surgical And Interventional Applications
 - 5.6.7 Medrobotics Technology & Research Center
- 5.7 Medtronic
 - 5.7.1 Medtronic PLC
 - 5.7.2 Medtronic O-arm Surgical Imaging System
- 5.8 Meerecompany/Eterne
- 5.9 Titan Medical
 - 5.9.2 Titan Medical General Surgery Robot Market Opportunities
 - 5.9.3 Titan Medical Robotic Surgery Target Opportunity
- 5.10 TransEnterix Acquires the ALF-X Surgical Robotic System
 - 5.10.2 TransEnterix Strategic Positioning
 - 5.10.3 TransEnterix
 - 5.10.4 TransEnterix/Sofar
- 5.11 Surgical Robot Companies

List Of Tables

LIST OF TABLES AND FIGURES

Table ES-1 Innovative Surgical Robot Features

Table ES-2 Surgical Robotics Market Driving Forces

Table ES-3 Surgical Robot Market Positioning

Table ES-4 Cardiac and Lung Surgical Robot Medical Sub-Specialties

Figure ES-5 Cardiac and Lung Surgical Robots Market Shares, Shipments, Dollars, Worldwide 2014

Figure ES-6 Cardiac and Lung Surgical Robot Systems Forecasts, Dollars, Worldwide, 2015-2021

Table 1-1 Cardiac Conditions Requiring Surgery

Table 1-2 Intuitive Surgical Robotic Cardiac Procedures

Table 1-3 Robotic Surgery Surgical Specialty Focus

Table 1-4 Mitral Valve Problem Description

Table 1-5 Causes Of Mitral Valve Problems

Table 1-6 Mitral Valve Replacement Possible Complications

Table 1-7 Factors That May Increase The Risk Of Complications With Heart Surgery

Table 1-8 Physician-Patient Mitral Valve Heart Valve Assessment Program Aspects

Table 1-9 Catheter-Based Valve Disease Procedures

Table 1-10 Cardiac Surgeon Open Surgical Procedures

Table 2-1 Innovative Surgical Robot Features

Table 2-2 Surgical Robotics Market Driving Forces

Table 2-3 Surgical Robot Market Positioning

Table 2-4 Cardiac and Lung Surgical Robot Medical Sub-Specialties

Figure 2-5 Cardiac and Lung Surgical Robots Market Shares, Shipments, Dollars, Worldwide 2014

Table 2-6 Cardiac and Lung Surgical Robot Market Shares, Dollars, Worldwide, 2014

Figure 2-7 Cardiac and Lung Surgical Robot Systems Forecasts, Dollars, Worldwide, 2015-2021

Table 2-8 Heart and Lung Surgical Robot Market Segment Forecasts, Dollars and Units, Worldwide, 2015-2021

Table 2-9 Number Intuitive Surgical Cardio/Thoracic Robotic Procedures, Regional Analysis by Procedure Type, 2014

Table 2-10 Open and Robotic Surgeries: Cardio Thoracic Procedure Forecasts, Number US and Worldwide, 2015-2021

Table 2-11 Cardio Thoracic Robotic Surgery Procedures By Country, 2014

Table 2-11 (Continued) Abdominal/Cardio Thoracic Robotic Surgery Procedures By

Country, 2014

Table 2-12 Cardio Thoracic Robotic Surgery Procedure Forecasts, Lobectomy, Mitrial Valve Repair, Vascular Surgery, Number of Procedures, Worldwide, 2015-2021

Figure 2-13 Cardiac and Lung Surgical Robot Regional Market Segments, Dollars, 2014

Figure 2-14 Cardiac and Lung Surgical Robot Regional Market Segments, 2014

Figure 2-15 China Robotic Cardiac Surgery

Figure 3-1 Intuitive Surgical Integrated Sub – Systems

Figure 3-2 Intuitive Surgical da Vinci Surgical System

Figure 3-3 Intuitive Surgical Da Vinci Surgery

Table 3-4 Intuitive Surgical Da Vinci Surgical System Components

Table 3-5 Intuitive Surgical Cardiac Conditions Addressed

Table 3-6 Minimally Invasive Da Vinci Surgery Benefits To Cardiac Patients

Figure 3-7 Intuitive Surgical da Vinci System State-Of-The-Art Robotic Surgical Platform

Table 3-8 Intuitive Surgical da Vinci Si Surgical System Core Benefits

Figure 3-9 Intuitive Surgical da Vinci SI Surgical System Dual Console Used For Training And Collaboration

Figure 3-10 Intuitive Surgical. da Vinci Surgical System Vision System

Table 3-11 Intuitive Surgical da Vinci Xi Surgical System Surgeon Console Features

Figure 3-12 Intuitive Surgical. da Vinci Surgical System Surgeon Console

Figure 3-13 Intuitive Surgical. da Vinci Surgical System Patient-Side Cart

Figure 3-14 Intuitive Surgical. da Vinci Surgical System EndoWrist Instruments

Table 3-15 Intuitive Surgical da Vinci Surgical System Features

Table 3-16 Advantages of Intuitive Surgical Cardio Thoracic Robotic Surgery

Table 3-17 Surgical Robot Cardiothoracic Conditions Treated

Figure 3-18 Intuitive Surgical da Vinci Surgical System, Surgeon Operates Seated Comfortably At A Console

Figure 3-19 Intuitive Surgical da Vinci Surgical System Patient Side Cart

Figure 3-20 Titan Single Port Orifice Robotic Technology SPORT Surgical System

Figure 3-21 Titan SPORT Surgical System

Table 3-22 Titan MedicalSPORT Surgical System Patient Benefits

Table 3-23 Titan MedicalSPORT Surgical System Surgeon Benefits

Table 3-24 Johnson & Johnson Ethicon Minimally Invasive Procedures As They Apply To Specific Conditions

Figure 3-25 Medrobotics Flex Retractor

Figure 3-26 Medrobotics Snakelike Robot Tested for Heart Surgery

Table 3-27 Medrobotics Medical Field Target Markets

Figure 3-28 Corindus CorPath Robotic Angioplasty

Figure 3-29 Corindus Command. Control CorPath 200 System

Figure 3-30 Corindus Precise Robotic Movement And Device Fixation

Table 3-31 Corindus Robotic-Assisted Control Benefits

Figure 3-32 Occupational Hazards in Cath Lab

Figure 3-33 Corindus Robotic Assisted PCI

Figure 4-1 Intuitive Surgical da Vinci Surgical System

Figure 5-1 Tianjin Municipality Micro Hand A Chinese Surgical Robots

Figure 5-2 China's First Surgical Robot For Minimally Invasive Surgery At Tianjin Municipality

Table 5-3 Benefits of Corindus CorPath Robotic-Assisted PCI

Figure 5-4 Corindus CorPath Benefits

Table 5-5 Corindus Benefits of CorPath Robotic-Assisted PCI

Figure 5-6 Corindus Step Away From Radiation Source During Robotic PCI

Table 5-7 Corindus CorPath Robotic-Assisted PCI Mean Radiation Dose (per procedure) By Position (?SV)²

Figure 5-8 Intuitive Surgical Platform, daVinci Xi

Table 5-9 Intuitive Surgical Strategy To Improve Candidate Surgical Procedures

Table 5-10 Johnson and Johnson Family of Companies Comprises

Table 5-11 Medrobotics Positioning 2015

Table 5-12 Medrobotics Cardiac Surgery Improvements

Table 5-12 Medrobotics Snake Robot Technologies For Use In A Wide Range Of Surgical And Interventional Applications

Table 5-13 Medrobotics Snake Robot Technologies Specialist Areas Served

Table 5-14 Medtronic O-arm Surgical Imaging StealthStation Navigation Functions

Table 5-15 Medtronic O-arm Surgical Imaging System Benefits

Table 5-16 Medtronic O-arm Surgical Imaging System

Table 5-17 Medtronic O-arm Surgical Imaging System Benefits

Figure 5-18 Medtronic Lumbar Imaging

Table 5-19 Titan Medical Investment Summary

Figure 5-20 Titan Medical Business Goals and Timetable

Figure 5-21 Titan Medical Describes Robotic General Surgery Market Potential

Figure 5-22 Titan Medical Robotic Surgery Target Opportunity

Table 5-23 TransEnterix Strategic Positioning

Figure 5-24 TELELAP Robotic Surgical Unit

Figure 5-25 Telelap ALF-X Robotic Surgery

Figure 5-26 TELELAP ALF-X Breaking Barriers Supporting Precision

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