Hybrid Operating Room Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028

Market Report | 2023-10-15 | 150 pages | IMARC Group

AVAILABLE LICENSES:

- Electronic (PDF) Single User $2499.00
- Five User Licence $3499.00
- Enterprisewide License $4499.00

Report description:

Market Overview:

The global hybrid operating room market size reached US$ 1,078 Million in 2022. Looking forward, IMARC Group expects the market to reach US$ 2,061 Million by 2028, exhibiting a growth rate (CAGR) of 10.8% during 2023-2028. The growing occurrence of various chronic ailments, rising popularity of minimally invasive surgical procedures, and increasing technological advancements in imaging modalities, such as 3D visualization, robotic-assisted surgery, and augmented reality (AR), are some of the major factors propelling the market.

A hybrid operating room (OR) is an advanced medical facility that combines the capabilities of a traditional surgical suite with state-of-the-art imaging technology, such as fluoroscopy, computed tomography (CT), and magnetic resonance imaging (MRI). It provides a versatile platform for performing complex surgical procedures that require real-time imaging guidance and intervention. It also offers a sterile surgical environment while integrating advanced imaging modalities within the same space, enabling surgeons to perform precise and minimally invasive interventions. It eliminates the need for patient transfers to different areas of the hospital, streamlining the workflow and minimizing the risk of complications associated with transportation.

At present, the increasing demand for hybrid ORs due to the rising focus on improved patient outcomes is impelling the growth of the market. Besides this, the increasing occurence of cardiovascular diseases and the subsequent need for complex surgeries, such as cardiac catheterizations, angioplasties, and heart valve replacements is contributing to the market growth. In addition, the growing technological advancements in imaging modalities, such as 3D visualization, robotic-assisted surgery, and augmented reality (AR), are offering a favorable market outlook. Apart from this, the increasing focus on value-based healthcare and cost containment is supporting the growth of the market. Additionally, the rising utilization of hybrid ORs, as they facilitate multidisciplinary collaboration among surgeons, radiologists, and other specialists, leading to improved efficiency and accurate diagnosis, is strengthening the growth of the market.

Hybrid Operating Room Market Trends/Drivers:
Rising demand for minimally invasive surgical methods

At present, there is a significant shift in surgical techniques towards minimally invasive procedures, driven by advancements in technology and patient preferences. This shift is creating a profound impact on various medical fields, including ophthalmology, cardiology, neurology, and orthopedics. Minimally invasive surgical techniques rely heavily on high-quality imaging to navigate intricate anatomical structures with precision. Hybrid ORs offer advanced imaging technologies, such as fluoroscopy, 3D imaging, and intraoperative magnetic resonance imaging (MRI) or computed tomography (CT) scans. These imaging modalities provide real-time visual feedback, allowing surgeons to visualize and assess the progress of the procedure accurately. Improved visualization enables surgeons to make precise incisions and perform complex interventions with greater confidence, ultimately leading to better patient outcomes.

Increasing focus on improving treatment and diagnostic procedures

The increasing focus on improving treatment and diagnostic procedures is positively influencing the hybrid operating room market. A hybrid operating room (OR) combines advanced imaging technology, including computed tomography (CT), magnetic resonance imaging (MRI), and angiography, with a fully equipped surgical suite. This integration allows for real-time imaging and surgical intervention in a single location, enabling a more efficient and precise approach to patient care. Hybrid ORs promote collaboration among different medical specialties, including surgeons, interventional radiologists, cardiologists, and anesthesiologists. The combination of imaging technologies and surgical capabilities within a single space facilitates real-time communication and coordination between specialists. This collaborative approach allows for comprehensive and individualized patient care. Hybrid ORs also offer a controlled environment that combines the safety and sterility of a traditional OR with the real-time imaging capabilities of an interventional radiology suite.

Growing occurrence of various chronic ailments

The rising occurence of chronic conditions, including cardiovascular diseases, cancer, and neurological disorders, is creating a need for advanced surgical interventions that can be performed in a hybrid OR setting. Chronic ailments often require a precise and accurate diagnosis to determine the appropriate treatment approach. Hybrid ORs combine the imaging capabilities of a traditional radiology suite with the sterile environment of an operating room, enabling real-time imaging during surgical procedures. Besides this, various chronic ailments can be effectively treated through minimally invasive procedures, which offer several benefits over traditional open surgeries, such as reduced trauma, shorter hospital stays, faster recovery times, and lower complication rates. Hybrid ORs provide an ideal setting for performing minimally invasive surgeries by combining surgical and imaging equipment in one space.

Hybrid Operating Room Industry Segmentation:
IMARC Group provides an analysis of the key trends in each segment of the global hybrid operating room market report, along with forecasts at the global, regional and country levels from 2023-2028. Our report has categorized the market based on component, application and end user.

Breakup by Component:

Intraoperative Diagnostic Imaging Systems
Angiography Systems
MRI Systems
CT Systems

Others
Operating Room Fixtures
Operating Tables
Operating Room Lights
Surgical Booms
Radiation Shields
Surgical Instruments
Audiovisual Display Systems and Tools
Others

Intraoperative diagnostic imaging systems dominate the market

The report has provided a detailed breakup and analysis of the market based on the component. This includes intraoperative diagnostic imaging systems (angiography systems, MRI systems, CT systems, and others), operating room fixtures (operating tables, operating room lights, surgical booms, and radiation shields), surgical instruments, audiovisual display systems and tools, and others. According to the report, intraoperative diagnostic imaging systems (angiography systems, MRI systems, CT systems, and others) represented the largest segment.

Intraoperative diagnostic imaging systems refer to a range of technologies and tools employed within the operating room to acquire high-quality images of the anatomy of patients during surgery. These systems are often integrated into surgical suites and can include various imaging modalities, such as X-ray, ultrasound, magnetic resonance imaging (MRI), computed tomography (CT), and fluoroscopy. They provide surgeons with precise real-time imaging during complex procedures. They help in identifying the location and extent of tumors, anatomical abnormalities, or other critical structures, enabling surgeons to navigate and manipulate delicate tissues more accurately. They also aid in the identification and localization of tumors within the body. Surgeons can use imaging techniques like intraoperative MRI or ultrasound to precisely locate tumors and ensure their complete removal while minimizing damage to healthy surrounding tissues.

Breakup by Application:

Cardiovascular Applications
Neurosurgical Applications
Thoracic Applications
Orthopedic Applications
Others

Cardiovascular applications hold the largest share in the market

A detailed breakup and analysis of the market based on the application have also been provided in the report. This includes cardiovascular applications, neurosurgical applications, thoracic applications, orthopedic applications, and others. According to the report, cardiovascular applications accounted for the largest market share.

The use of a hybrid operating room (OR) in cardiovascular applications is revolutionizing the field of cardiovascular surgery by combining the benefits of traditional surgical techniques with advanced imaging and minimally invasive interventions. It is particularly beneficial for complex cardiac procedures, consisting transcatheter aortic valve replacement (TAVR), mitral valve repair, or complex coronary artery bypass grafting (CABG). The integrated imaging systems enable real-time visualization of the heart and blood vessels, allowing surgeons to perform minimally invasive interventions with high precision. It also facilitates minimally invasive procedures, reducing the need for open-heart surgery and its associated risks. It allows for seamless

integration between imaging and surgical procedures. Furthermore, it facilitates a hybrid approach, combining both surgical and interventional techniques in a single procedure.

Breakup by End User:

Hospital and Surgical Centers
Ambulatory Surgical Centers

Hospital and surgical centers hold the largest share in the market

A detailed breakup and analysis of the market based on the end-user have also been provided in the report. This includes hospital and surgical centers and ambulatory surgical centers. According to the report, hospital and surgical centers accounted for the largest market share.

Hospitals and surgical centers require hybrid ORs for several reasons, as they offer numerous advantages that significantly enhance patient care and surgical outcomes. Hybrid ORs are equipped with state-of-the-art imaging technologies, such as fluoroscopy, angiography, CT, or MRI. These imaging modalities provide real-time visualization of anatomical structures, blood flow, and device placement during surgical procedures. The availability of advanced imaging capabilities within the OR allows for precise diagnosis, accurate guidance during interventions, and immediate assessment of treatment effectiveness. Hybrid ORs are also suitable for performing minimally invasive procedures. The advanced imaging systems enable surgeons to visualize and navigate through complex anatomical structures using catheters, guidewires, or other specialized instruments. Moreover, minimally invasive techniques reduce patient trauma, promote faster recovery times, and decrease the risk of complications compared to traditional open surgeries.

Breakup by Region:

North America
United States
Canada
Asia-Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil

Mexico
Others
Middle East and Africa

North America exhibits a clear dominance, accounting for the largest hybrid operating room market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America held the biggest market share since the region has a robust infrastructure for medical research and development (R&D), leading to the creation of innovative imaging technologies, surgical equipment, and integration systems.

Another contributing aspect is the increasing demand for minimally invasive procedures. Besides this, the increasing occurrence of various chronic ailments due to the rising adoption of sedentary lifestyle habits is propelling the growth of the market.

Asia Pacific is estimated to expand further due to the increasing focus on value-based healthcare to achieve better outcomes at lower costs. Moreover, the increasing construction of hospitals, nursing homes, and clinics to provide quality healthcare services to patients is strengthening the growth of the market.

Competitive Landscape:
Key market players are focusing on developing innovative imaging and diagnostic solutions, such as advanced imaging modalities, robotic-assisted surgery technologies, and integrated clinical applications. They are also investing in research and development (R&D) to introduce new products with improved performance, workflow efficiency, and patient safety features. Top companies are offering comprehensive hybrid OR solutions, including imaging systems, surgical tools, and data management platforms. They are focusing on interoperability, integrating their devices and software into a unified ecosystem to enhance workflow efficiency and facilitate data sharing. Leading companies are developing hybrid OR workflow optimization tools and surgical planning software. They are providing surgeons with comprehensive control and access to advanced visualization tools during procedures.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

ALVO Medical
General Electric Company
Getinge AB
Hill-Rom Holdings Inc. (Baxter International Inc.)
IMRIS
Koninklijke Philips N.V.
Siemens Healthineers AG (Siemens AG)
Steris Corporation
Toshiba Corporation

Recent Developments:
In 2023, Getinge AB announced the clearance from US FDA for its Servo-air Lite, which is a wall gas-independent non-invasive mechanical ventilator.

In December 2018, IMRIS announced its agreement with Prince Sultan Military Medical City to build the first IMRIS Surgical Theater in Saudi Arabia, which will offer intraoperative imaging.
In June 2023, Steris Corporation announced the acquisition of surgical instrumentation assets from Becton, Dickinson, and Company to expand, strengthen, and complement their product offerings in the healthcare segment.

Key Questions Answered in This Report

1. What was the size of the global hybrid operating room market in 2022?
2. What is the expected growth rate of the global hybrid operating room market during 2023-2028?
3. What are the key factors driving the global hybrid operating room market?
4. What has been the impact of COVID-19 on the global hybrid operating room market?
5. What is the breakup of the global hybrid operating room market based on the component?
6. What is the breakup of the global hybrid operating room market based on the application?
7. What is the breakup of the global hybrid operating room market based on the end user?
8. What are the key regions in the global hybrid operating room market?
9. Who are the key players/companies in the global hybrid operating room market?

Table of Contents:

Hybrid Operating Room Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028

Market Report | 2023-10-15 | 150 pages | IMARC Group

To place an Order with Scotts International:

- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Electronic (PDF) Single User	$2499.00
	Five User Licence	$3499.00
	Enterprisewide License	$4499.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2025-06-21
		Signature