

Global Operating Room Integration - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Global Operating Room Integration Market size is estimated at USD 2.57 billion in 2024, and is expected to reach USD 4.44 billion by 2029, growing at a CAGR of 11.57% during the forecast period (2024-2029).

The COVID-19 caused considerable wait times for patients standing by for surgery. A study published in the British Journal of Surgery showed that COVID-19 led to 28 million postponed or canceled surgeries globally in 2020 with millions of surgeries pushed into 2021. Thus, with thousands of patients facing delays in surgeries the necessity to enhance scheduling efficiencies has become more important. Furthermore, the pandemic has pushed market players to operate in new ways, thus accelerating digitization. Operating rooms and surgical procedures changed in the following three ways in response to the pandemic-increased pre-surgical planning, video conferencing, and remote post-surgical patient engagement.

The factors such as a surge in patient procedures for minimally invasive surgeries are the major driving factors for the growth of the market. This is mainly due to the increasing awareness about the surgical interventions to treat conditions such as obesity has led medical device manufacturers to develop advanced operating room integration. Additionally, growth in the geriatric population resulting in the rising demand for surgeries which results in a cumulative increase in the number of operating procedures is also expected to drive the growth of the market. For instance, in 2020, the article titled 'The Incidence and Cumulative Risk of Major Surgery in Older Persons in the United States mentioned that nearly 9 major surgeries were performed annually for every 100 older persons, and more than 1 in 7 Medicare beneficiaries underwent a major surgery over 5 years, representing nearly 5 million unique older people.

Moreover, the rising burden of chronic disease across the globe is also one of the major factors increasing the demand for the operating room, as end-stage chronic diseases generally demand surgery. For instance, as per the American Health Association, in

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

2022, operating rooms resumed their activities and observed an upsurge in medical health treatments and surgeries, leading to only a 10% lower rate of surgery by the end of 2020 in comparison to 2019. Moreover, per the Organization for Economic Cooperation and Development (OECD), the number of cataract surgical procedures reported in 2020 in Turkey was 393,901. According to the same source, the number of hip replacement procedures in Italy in 2020 was 84,647, and cesarean section procedures were approximately 114,601. Thus, this growth in the number of surgical procedures will likely increase the demand for the operating room, thereby contributing to market growth.

Thus the above-mentioned factors are expected to drive the growth of the market during the forecast period.

Operating Room Integration Market Trends

The Cardiovascular Surgery Segment is Expected to Hold a Major Market Share in the Operating Room Integration Market

The sudden outbreak of COVID-19 seemed to impede the growth of the market due to the sudden imposition of restrictions across the world by different governments. This reduced the manpower in the supply chain and also affected the manufacturing processes as well. However, the relaxation of strict lockdowns during the post-pandemic period has increased the patient influx and thereby propelling the growth of the market.

The Cardiovascular surgery segment is expected to hold a dominating share in the studied market owing to the surge in cardiovascular diseases and related surgeries across the globe. For instance, The data published by the European Heart network in 2021 reported that in the European Union, more than 60 million people live with cardiovascular disease and that close to 13 million new cases of cardiovascular diseases are diagnosed every year. Moreover, with the rising burden of diseases caused by unhealthy lifestyles, such as obesity, being overweight is expected to drive the growth of the market. The article published by A-mansia Biotech in 2020 states that more than 2 billion adults 18 years and older were overweight across the world. Of these, over 650 million were obese in the world. The World Health Organization (WHO) published in 2021 that modifiable behavioral risk factors such as tobacco use account for over 7.2 million deaths every year, and 1.6 million deaths annually can be attributed to insufficient physical activity. As per the study published by the British Heart Foundation in 2021, Around 371,000 heart procedures and operations in England in 2020. Also, the article published by the American Heart Association in 2021, Approximately 40,000 children undergo congenital heart surgery in the United States each year. Such an increasing number of cardiovascular surgeries leads to the rise in the demand for cardiovascular surgery and better operating room integration procedures.

Thus, the above-mentioned factors are expected to drive the growth of the studied segment during the forecast period.

North America is Expected to Hold a Significant Share in the Market and is expected to do the Same in the Forecast Period.

The United States is likely to command the global market due to the growing prevalence of chronic diseases and the rising adoption of advanced surgical treatment methodologies in the region. For instance, as per the National Center for Chronic Disease Prevention and Health Promotion (January 2021), 6 in 10 adults in the United States have a chronic disease, and 4 in 10 adults have two or more chronic diseases, and these conditions are posing around USD 3.8 trillion of healthcare costs on the country's healthcare system. Furthermore, due to the high growth potential of the United States operating room integration market, the companies operating in the country are filing for market strategies to have the edge over their competitors, which is further expected to augment the growth of the studied market in the country over the forecast period. For instance, in June 2021, Getinge revealed that it released the 'Torin' AI-based OR management system in the United States.

Additionally, an increase in research and development activities, quick adaptability to advanced technology, and the presence of favorable healthcare infrastructure are fueling the growth of the overall regional market to a large extent.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Operating Room Integration Industry Overview

The operating room integration market is fragmented and competitive and consists of several major players. In terms of market share, a few of the major players are currently dominating the market. Some of the companies which are currently dominating the market are Brain Lab AG, Canon Inc., Doricon Medical Systems, Getinge AB, Karl Storz GMBH, Olympus Corporation, Merivaara Corp., Steris PLC, Stryker Corporation, Skytron LLC, and others..

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Rise in number of surgical procedures
 - 4.2.2 Surge in patient preference for minimally invasive surgeries and Patient Safety concerns in operating room
- 4.3 Market Restraints
 - 4.3.1 High cost and maintenance of the operating room integration
- 4.4 Porter's Five Force Analysis
 - 4.4.1 Threat of New Entrants
 - 4.4.2 Bargaining Power of Buyers/Consumers
 - 4.4.3 Bargaining Power of Suppliers
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)

- 5.1 By Component
 - 5.1.1 Software
 - 5.1.2 Services
- 5.2 By Application
 - 5.2.1 General Surgery
 - 5.2.2 Orthopedic Surgery
 - 5.2.3 Cardiovascular Surgery
 - 5.2.4 Neurosurgery
 - 5.2.5 Others
- 5.3 Geography
 - 5.3.1 North America

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.3.1.1 United States
- 5.3.1.2 Canada
- 5.3.1.3 Mexico
- 5.3.2 Europe
 - 5.3.2.1 Germany
 - 5.3.2.2 United Kingdom
 - 5.3.2.3 France
 - 5.3.2.4 Italy
 - 5.3.2.5 Spain
 - 5.3.2.6 Rest of Europe
- 5.3.3 Asia-Pacific
 - 5.3.3.1 China
 - 5.3.3.2 Japan
 - 5.3.3.3 India
 - 5.3.3.4 Australia
 - 5.3.3.5 South Korea
 - 5.3.3.6 Rest of Asia-Pacific
- 5.3.4 Middle-East and Africa
 - 5.3.4.1 GCC
 - 5.3.4.2 South Africa
 - 5.3.4.3 Rest of Middle-East and Africa
- 5.3.5 South America
 - 5.3.5.1 Brazil
 - 5.3.5.2 Argentina
 - 5.3.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 Brain Lab AG
 - 6.1.2 Canon Inc
 - 6.1.3 Doricon Medical Systems
 - 6.1.4 Getinge AB
 - 6.1.5 Karl Storz GMBH & Co. KG
 - 6.1.6 Olympus Corporation
 - 6.1.7 Merivaara Corp.
 - 6.1.8 Steris PLC
 - 6.1.9 Stryker Corporation
 - 6.1.10 Skytron LLC

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Global Operating Room Integration - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

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
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		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*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-26"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

