

Australia Spine Surgery Market Assessment, By Products [Spinal Fusion Devices, Spinal Decompression Devices, Non-Fusion Devices, Others], By Surgery [Open Surgery, Minimally Invasive Surgery], By Disease Indication [Degenerative Disc Disease, Complex Deformity, Traumas and Fractures, Others], By Procedure [Discectomy, Laminotomy, Foraminotomy, Corpectomy, Facetectomy], By End-user [Hospitals, Ambulatory, Surgical Centers, Specialty Clinics, Others], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Australia spine surgery market is projected to witness a CAGR of 5.28% during the forecast period 2024-2031, growing from USD 183.32 million in 2023 to USD 278.68 million in 2031. Rising cases of spinal cord tumors support the market's growth, the introduction of supportive government initiatives, and an increasing preference for minimally invasive procedures. According to the estimates of the Spine Society of Australia, approximately 45,000 individuals undergo spine surgery in Australia every year. The increasing incidences of scoliosis, degenerative disc degeneration, and spinal stenosis drive the need for surgical procedures. Additionally, the market's growth is supported by rising rates of spinal injuries and trauma, the expansion of the aging population, and the increasing utilization of cutting-edge technologies and surgical procedures. Additionally, the rising prevalence of obesity is also supporting the growth of the Australia spine surgery market, as obesity can result in the aggravation of existing conditions and contribute to back pain. As per the Australian Institute of Health and Welfare (AIHW) one in four adolescents and children of age group 2-17 and approximately 66% of the adults were obese or overweight in 2022. The continuous evolution in spine surgery technologies and increasing efforts of the key players in the market to boost the

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introduction of novel technologies in the country are also expected to positively influence the market's expansion.

Moreover, the rising cases of spinal cord injuries and trauma due to road accidents in Australia are also propelling the requirement for spine surgery, 1,194 road crash deaths were reported in the country in 2022. Road accidents often result in whiplash, which can damage the soft tissue and can cause severe spinal conditions such as fractures, sprains, herniated discs, and strains.

Rising Cases of Spinal Cord Tumors Support Market Expansion

The increasing incidences of spinal cord tumors in the country is one of the major factors boosting the Australia spine surgery market growth. According to the estimates of the Sydney Children's Hospitals Network, approximately 100 children between the ages of 0-14 are diagnosed with spinal cord or brain tumors every year in Australia. In most cases, to protect the nervous system and its functioning, surgeons remove the tumors before they grow and put pressure on the spinal cord. The main goal of the surgery is to alleviate pressure and pain in the spinal cord by removing or reducing the size of the tumor. Often a vertebra or a part of the spinal bone is removed during the surgery, and a bone graft or screws and metal plates are used to stabilize the vertebrae.

Presence of Supportive Government Initiatives Boosts Market Expansion

Initiatives such as the Australian Spine Registry (ASR) that aim to improve the quality of care provided to patients undergoing spine surgery in Australia are expected to boost the demand for spine surgeries in Australia. In 2023, they recruited Ballarat Base Hospital, Royal Adelaide Hospital, Royal Perth Hospital, St John of God Ballarat, and Epworth Geelong and have also been working to establish a pediatric registry pilot (pASR) in Brisbane at the Queensland Children's Hospital for collecting data for children with scoliosis.

The 2023-2024 budget of the Commonwealth Government showed that they would fund more clinical quality registries (USD 40 million) to ensure that patients receive high-quality treatments and medical procedures. ASR was one of the registries identified to receive funding and received USD 1.8 million from the Commonwealth Government.

Discectomy Accounts for a Significant Market Share

The growing requirement for discectomy is positively influencing the market's expansion. Discectomy is opted for treating herniated discs, which are often caused by degenerative disc disease, and involves relieving pressure from the nerve by removing the injured portion of the disc. According to the 2023 annual report of the Australian Spine Registry, the average total cost of a single-level discectomy is about USD 3,900 (AUD 6,000).

The increasing adoption of the procedure can be attributed to the advantages associated with the anterior approach, including providing surgeons access to the herniated disc from the front of the neck in the anterior approach and the back in the posterior approach. The latter is adopted if the herniated disc compresses the nearby nerves, and the former if the herniated disc compresses the spinal cord and the nerves. This surgical procedure is usually adopted in cases of severe pain and numbness. The rising cases of back-related issues in the country are propelling the segment's expansion and providing lucrative growth opportunities to the market.

Degenerative Disc Disease Holds Major Market Share

The segment's growth is supported by the expansion of the aging population in the country, as the risk of developing degenerative disc disease increases with age. According to the University of Sydney estimates, by 2026, over 22% of Australians will be 65 or older. If neck or back pain caused by degenerative disc disease does not respond to therapeutic injections or medication, surgeries are opted for treating patients. Additionally, sedentary work involving long hours at a desk puts extra pressure on the spine, resulting in faster degeneration of the discs. Moreover, poor ergonomics, slouching posture, and lack of movement can further accelerate the process of degeneration. To fix the situation, a small portion or the entirety of the damaged disc is removed to stop movement between the bones and take pressure off the pinched nerves, bolstering the market's demand.

Future Market Scenario (2024-2031F)

According to the Australia spine surgery market analysis, the decreasing invasiveness of surgical procedures and growing proficiency of surgeons in endoscopic spine approaches are increasing the possibility that discectomy and spinal decompression can be performed on a day-surgery basis, resulting in reduced bed pressure and surgical wait time and improved patient satisfaction along with overall reductions in healthcare costs. Furthermore, spinal motion preservation technologies are expected to redefine spine surgeries in the coming decades. Additionally, the market's growth is expected to be supported by rising investments in research activities in Australia. The Spine and Scoliosis Research Associates are conducting an observational study

expected to conclude in 2030 to prospectively and systematically compare surgical fusion techniques and assess revision rates and patient outcomes in the long run.

Key Players Landscape and Outlook

The rising investments by the market's key players towards the introduction of novel technologies in the country are bolstering the Australian spine surgery market. In July 2022, Globus Medical, Inc. announced that the first spinal surgery with ExcelsiusGPS was performed at Westmead Private Hospital in Sydney. The robotic navigation platform is designed to improve the accuracy and safety of the patients. It provides visualization of the patient's anatomy to allow surgeons to optimize treatments and reduce radiation exposure to staff and surgeons. ExcelsiusGPS also combines full navigation capabilities and a rigid robotic arm in one platform for accurate trajectory alignment during the surgical procedure.

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- *Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available

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during research work.

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