

Spinal Surgical Robots: Market Shares, Strategies, and Forecasts, Worldwide, 2016-2022

Table of Contents

Spinal Surgical Robot: Executive Summary

The study is designed to give a comprehensive overview of the Spinal Surgical Robot equipment market segment. Research represents a selection from the mountains of data available of the most relevant and cogent market materials, with selections made by the most senior analysts. Commentary on every aspect of the market from independent analysts creates an independent perspective in the evaluation of the market. In this manner the study presents a comprehensive overview of what is going on in this market, assisting managers with designing market strategies likely to succeed.

Table of Contents

Spine Surgical Robot Executive Summary	23
Spine Surgical Robot Mapping	23
Spine Surgery Robotics Market Driving Forces	27
Spine Surgery Robot Market Shares	28
Surgical Robot for Spine Market Forecasts	30
1. Spinal Surgery Robots Market Description and Market Dynamics	31
1.1 Key Elements Of Spinal Robot System	31
1.2 Industry Overview - Spine	33
1.2.1 Robot Assisted Surgery	35
1.2.2 Spine Robotic Surgical Market Strategy	36
1.2.3 Focus on Key Institutions	37
1.2.4 Focus on Leading Surgeons to Drive Rapid and Broad Adoption	37

1.2.5	Maintain Market Leadership	38
1.3	Spine Surgery	38
2.	Spine Surgical Robot Market Shares and Forecasts	41
2.1	Spine Surgical Robot Mapping	41
2.1.1	Spine Surgery Robotics Market Driving Forces	45
2.2	Spine Surgery Robot Market Shares	47
2.2.1	Mazor	51
2.2.2	Surgical Robots for the Spine: Mazor Robotics	51
2.2.3	Mazor Renaissance® System	55
2.2.4	Mazor Robotics Guidance System Maximizes Precision And Safety	56
2.3	Surgical Robot for Spine Market Forecasts	57
2.3.1	Surgical Robot Systems vs. Disposable Instruments Forecasts	69
2.3.2	Shenzhen Advanced Institute Spinal Surgical Robot	74
2.3.3	U.S. Minimally Invasive Spinal Implant Market To Outpace Growth In	
	Traditional Spine Market	74
2.4	Medical Robotic Surgery Challenges	75
2.5	Key Players In The Global Medical Robots	78
2.5.1	Key Players In The Global Spinal Implant Market	81
2.5.2	Medtronic	84
2.5.3	NuVasive	84
2.5.4	SI-BONE	85
2.5.5	Minimally Invasive Surgical Instruments	85
2.5.6	Spinal Restorative Therapy Target Markets	87
2.6	Spine Surgery Robot Prices	87
2.7	Spine Surgery Robot Regional Market Segments	91
2.7.1	US	93

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

2.7.2	U.S.-Europe Product Introduction Swap	94
2.7.3	Asia-Pacific	95
2.7.4	China	95
2.7.5	Underdeveloped Regions	96
2.7.6	Brazil	96
2.7.7	Spinal Patients in Taiwan Receive Fast Care with Unique Reimbursement Structure; Market Led by DePuy Synthes, Medtronic	97
3.	Surgical Robots Product Description	98
3.1	Mazor Robotics	98
3.1.1	Mazor Renaissance In the Operating Room	101
3.1.2	Mazor Robotics Ease of Use and Reduced Length of Stay	101
3.1.3	Mazor Products: Components of the Renaissance System	102
3.1.4	Mazor Mounting Platforms, Disposables, and Accessories	104
3.1.5	Surgical Workflow Using Mazor Renaissance	104
3.1.6	Mazor Three-Dimensional (3D) Synchronization	106
3.1.7	Mazor Spine Surgical Execution	107
3.1.8	Mazor Spine Robot Surgery Applications:	109
3.1.9	Mazor Spine Robot Surgery Applications: Spinal Fusion	110
3.1.10	Mazor Spine Robot Surgery Applications: Scoliosis Surgery	110
3.1.11	Mazor Renaissance® System For Robotic Guidance	111
3.1.12	Mazor Renaissance® Spine Procedures	113
3.1.13	Mazor Robotics Spine Procedures	117
3.1.14	Mazor Robotics Clinical Study	118
3.1.15	Mazor Robotics Reduced Exposure to Radiation	119
3.2	Medtronic	119
3.2.1	Medtronic Spinal Fusion	121

Spinal Surgical Robot Table of Contents

and List of Tables and Figures

3.2.2	Medtronic Cervical Artificial Disc Products	122
3.2.3	Medtronic Biologics Products	124
3.2.4	Medtronic Minimally Invasive Spinal Surgery	124
3.2.5	Medtronic Posterior OCT Reconstruction	127
3.3	Stryker Spine Surgery	128
3.3.1	Stryker Spine Navigation Software	128
3.3.2	Stryker's VertaPlex® HV First PMMA to Receive Clearance for Treating	
	Sacral Insufficiency Fractures	129
3.4	Exactech	131
3.5	Zimmer / Biomet Spine	132
3.6	Medacta	133
3.7	DJO	135
3.8	Johnson & Johnson / DePuy	138
3.8.1	Johnson & Johnson / Ethicon	138
3.9	NuVasive	139
3.9.1	Nuvasive Spinal Surgical Solutions	140
4.	Medical Robot Technology and Disease Statistics	142
4.1.1	Healthcare Robotics Enabling Technology	142
4.1.2	Robotic-Assisted Minimally Invasive Surgery Market Driving Forces	143
4.2	Mazor Renaissance Surgical Spine Robot FDA Marketing Clearance 510(k)	146
4.3	Robotic Surgical Clinical Applications	146
4.4	Mesenchymal Stem Cells (MSC) Role In Regenerative Medicine	148
4.5	Types of Spine Surgeries	148
4.6	Minimally Invasive Spine Fusion:	150
4.6.1	Scoliosis Correction Surgery:	151
4.6.2	Vertebroplasty:	152

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

4.6.3 Spine Biopsies:	153
4.7 Spine Surgery Device Market	154
4.8 Mazor Renaissance® Guidance System Technology	155
4.9 Government Regulation	156
4.9.1 California Regulation	159
4.9.2 International Regulation	159
4.9.3 Third Party Reimbursement	160
5. Spinal Surgical Robots Company Description	163
5.1 Accel Spine	163
5.2 Alliance Spine	163
5.2.1 Alliance Spine has Surgical Advisory Boards	164
5.2.2 Alliance Spine Bone Marrow Concentrate System	165
5.3 Alphatec	168
5.3.1 Alphatec Spine	168
5.4 Apollo Spine	170
5.5 Ascendx Spine	170
5.6 Back 2 Basics Spine	171
5.7 Boston Scientific	172
5.7.1 Boston Scientific Precision™ Plus Spinal Cord Stimulator System	172
5.7.2 Boston Scientific Pain Medicine	173
5.8 Brainlab AG	174
5.8.1 Brainlab AG Revenue	175
5.8.2 Brainlab	177
5.9 Captiva Spine	178
5.10 Centinel Spine	179
5.11 Elekta	180
5.11.1 Elekta Gamma Radio Surgery System	181

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

5.11.2	Elekta - Interim Report May – October 2015/16	182
5.11.3	Elekta Transformation Program On Track	184
5.12	Globus Medical	186
5.10.1	Globus Purchased Excelsius Surgical	188
5.13	K2M	188
5.14	Life Spine	190
5.15	Mazor Robotics	190
5.15.1	Mazor Robotics Creates Robotic Guidance Systems	192
5.15.2	Mazor Robotics Strategy	192
5.15.3	Research Agreement with Cleveland Clinic Foundation (CCF)	196
5.15.4	Mazor Surgical Workflow Using Renaissance for Spine Procedures	197
5.15.5	Mazor Robotic Pre-Operative Planning	198
5.16	Medacta	201
5.16.1	Medacta Business	202
5.17	Medtronic	202
5.17.1	Medtronic Revenue	203
5.17.2	Medtronic Operating Segments	206
5.17.3	Medtronic Sacroiliac Joint Fusion Device Spinal Implant Market	212
5.17.4	Medtronic Spine	213
5.17.5	Medtronic in the U.S. Spinal Implant Market	214
5.17.6	Medtronic Acquisition of Covidian	215
5.17.7	Medtronic Acquisition of RF Surgical Systems	215
5.17.8	Medtronic Acquisition of Medina Medical	215
5.17.9	Medtronic Pelvic Mesh Litigation	216
5.17.10	Medtronic Restorative Therapies Group	216
5.18	MicroPort Scientific Corporation	218

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

5.18.1 MicroPort Orthopedic Devices	219
5.18.2 MicroPort Acquires OrthoRecon Business from Wright Medical Technologies	219
5.18.3 Microport Hip Systems	220
5.19 NLT Spine	220
5.20 NuVasive	221
5.20.1 NuVasive Full-Year 2015 Revenue	221
5.21 Precision Spine	223
5.22 Shenzhen Advanced Institute Spinal Surgical Robot	225
5.23 Si-Bone	225
5.23.1 SI-BONE iFuse Implant System	227
5.24 SIGNUS Medical	228
5.25 Spinal Elements	230
5.26 Spineart	230
5.27 SpineGuard	231
5.28 Spine Frontier	231
5.29 Spineology	232
5.30 Spine Smith Partners	232
5.31 Spine Surgical Innovations	233
5.31.1 Spine Surgical Innovations MIMS Approach, Minimum Incision, Maximum Sight	233
5.32 Spine View	234
5.33 Spine Wave	235
5.34 St. Jude Medical	235
5.35 Stryker	236
5.35.1 Stryker / MAKO Surgical	237
5.35.2 Stryker Revenue	237

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

5.35.3 Stryker Results Of Operations	239
5.35.4 Stryker Segment Orthopaedics	240
5.35.5 Stryker Business Segment Operations	241
5.35.6 Stryker Revenue	242
5.35.7 Stryker Hip Recall: \$1.4 Billion Settlement	243
5.35.8 Stryker Regional Revenue Segment	244
5.35.9 Stryker Robots	245
5.35.10 Stryker / MAKO Surgical	252
5.35.11 Stryker / Mako	253
5.35.12 MAKO Surgical RIO Robotic Arm	263
5.35.13 Stryker Endoscopy	264
5.35.14 Mako Surgical Business	265
5.35.15 Mako Products	266
5.35.16 Mako Surgical Strategy	269
5.35.17 Mako Surgical Revenue	272
5.35.18 Mako Surgical Business	274
5.35.19 Mako Products	275
5.35.20 Mako Surgical Strategy	278
5.35.21 Mako Surgical Revenue	281
5.36 Wenzel Spine	281
5.37 Wright Medical Technology	282
5.37.1 Wright Revenue	282
5.37.2 Wright Medical Group NV Revenue	283
5.37.3 Wright Medical Group N.V. Revenue for 2015 Third Quarter	284
5.37.4 Wright / Tornier	289

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

5.38 X-spine	289
5.39 Zyga Technology	291
5.40 Zimmer Biomet	293
5.40.1 Zimmer Biomet Sales by Product Category	296
5.40.2 Zimmer Biomet	297
5.40.3 Zimmer Metal-on-Metal Hip Recall	299
5.41 Spine Surgical Companies	301
5.41.1 Spine Surgical Imaging	307

List of Tables and Figures

Table ES-1	25
Robot-Guided Spine Surgery Benefits	25
Table ES-2	25
Spine Surgery Robot-Guidance Features	25
Table ES-3	26
Robot-Guide For Spine Surgery Components	26
Table ES-4	27
Robot Spine Surgery Market Driving Forces	27
Figure ES-5	29
Spine Surgical Robot Market Shares, Shipments, Dollars, Worldwide 2015	29
Figure ES-6	30
Spinal Surgical Robots Market Forecasts, Dollars, Worldwide, 2016-2022	30
Table 1-1	32
Key Elements Of A Spinal Robot System	32

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

Table 1-2	33
Spine Disorder Market Driving Forces	33
Table 1-3	36
Spine Surgical Robot Focus on Key Procedures	36
Table 1-4	39
Spinal Surgery Scientific Advances	39
Table 1-5	39
Robot-Guided Spinal Surgery Advantages:	39
Table 2-1	43
Robot-Guided Spine Surgery Benefits	43
Table 2-2	43
Spine Surgery Robot-Guidance Features	43
Table 2-3	44
Robot-Guide For Spine Surgery Components	44
Table 2-4	45
Robot Spine Surgery Market Driving Forces	45
Figure 2-5	48
Spine Surgical Robot Market Shares, Shipments, Dollars, Worldwide 2015	48
Table 2-6	49
Spine Surgical Robot Market Shares, Dollars, Worldwide, 2015	49
Table 2-7	50
Principal Competitive Factors in the Robotic Spine Surgery Market	50

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

Table 2-8	51
Mazor Revenue, 2010-2015	51
Figure 2-9	54
Mazor Leading Spine Surgery Innovation	54
Figure 2-10	57
Spinal Surgical Robots Market Forecasts, Dollars, Worldwide, 2016-2022	57
Table 2-11	58
Spinal Surgical Robot Market Forecasts, Dollars, Worldwide, 2016-2022	58
Table 2-12	59
Spinal Surgical Robot Revenue by Segment, Robots and Disposables, Worldwide, 2016-2022	59
Table 2-13	60
Robot Spine Procedures, Number, Worldwide, 2015	60
Table 2-14	61
Spinal Surgical Robot Units Shipped Forecasts, Surgical Robotic Procedures, and Number Procedures per Installed Unit, Worldwide, 2016-2022	61
Table 2-15	62
Spinal Surgical Robot Installed Base, Percent Spinal Procedure Penetration, and # Spinal Procedures, US and Worldwide, 2016-2022	62
Table 2-16	63
Spinal Surgical Patients with Chronic Back Pain and % Penetration Procedures Worldwide, 2016-2022	63
Table 2-17	64

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

Robot Spine Surgery Market Factors:	64
Table 2-18	65
Robotics Market Aspects	65
Table 2-19	66
Spinal Surgery Hospital Trends	66
Table 2-20	67
Robotic Cost Savings with Spinal Surgical Units	67
Figure 2-21	69
Surgical Robot Systems vs. Instruments Forecasts, Dollars, Worldwide, 2016-2022	69
Table 2-22	71
Benefits of Robotic Surgery For The Surgeon	71
Table 2-23	72
Benefits of Robotic Surgery For The Patient	72
Table 2-24	73
Benefits of Robotic Surgery For The Hospital	73
Table 2-25	76
Challenges of Open Surgery and Minimally Invasive Surgery	76
Table 2-26	77
Challenges of Developing Medical Robotic Surgery Systems	77
Table 2-27	78
Surgical Robotic Product Development Challenges	78

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

Table 2-28	79
Key Players In The Global Medical Robots Market	79
Table 2-29	83
Key Players In The Global Spinal Implant Market	83
Table 2-30	86
Advantages of Minimally Invasive Surgeries	86
Table 2-31	86
Challenges of Minimally Invasive Surgeries	86
Figure 2-32	91
Spine Surgical Robot Regional Market Segments, Dollars, Worldwide, 2015	91
Table 2-33	92
Spine Surgical Robot Regional Market Segments, 2015	92
Figure 3-1	99
Mazor 3D Visualization of Surgical Planning	99
Figure 3-2	100
Mazor Planning Software / 3D visualization	100
Table 3-3	102
Mazor Components of the Renaissance System	102
Table 3-4	103
Mazor Renaissance System Component Tasks	103
Table 3-5	105
MAZOR RBT Device Surgical Workflow Using Renaissance for Spine Procedures	105

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

Figure 3-6	107
Mazor Renaissance RBT Device Accuracy of the 3D Synchronization 3D Marker; C-arm in 2 Positions Taking Registration Images for 3D Synchronization Process	107
Figure 3-7	108
Mazor RBT Device (with an arm connected to it) on Clamp Mount Ready To Guide The Surgeon	108
Figure 3-8	109
Mazor Spine Robot Surgery Applications:	109
Figure 3-9	112
Mazor Robotics' Renaissance® System For Guidance	112
Figure 3-10	113
Mazor Renaissance® Spine Procedures	113
Figure 3-11	117
Mazor Robotics Spine Procedures Variety	117
Table 3-12	120
Medtronic Spinal Conditions Treated	120
Table 3-13	123
Medtronic Infuse® Bone Graft/LT-Cage® Lumbar Tapered Fusion Device Risks	123
Table 3-14	126
Medtronic Minimally Invasive Spine Platform Enables A Variety Of Cervical, Thoracic, And Lumbar Procedures	126
Figure 3-15	127
Medtronic Posterior OCT Reconstruction	127

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

Table 3-16	129
Stryker Spine Navigation Software Key Advantages	129
Table 3-17	132
Zimmer / Biomet Spine Surgical Solutions	132
Figure 3-18	133
Biomet Sequoia® Thoracolumbar Pedicle Screws with TM Ardis™ Interbody System	133
Figure 3-19	135
DJO Cement Solutions	135
Table 3-20	135
DJO Spine Devices	135
Table 3-21	140
Nuvasive Surgical Solutions Procedures	140
Table 3-22	141
Nuvasive Surgical Solutions NVM5® Nerve Monitoring System	141
Table 4-1	142
Healthcare Robotics Enabling Technologies	142
Table 4-2	143
Robotic-Assisted Minimally Invasive Surgery Market Driving Forces	143
Table 4-2 (Continued)	144
Robotic-Assisted Minimally Invasive Surgery Market Driving Forces	144
Table 4-3	145

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

Types Of Procedures Performed Using Robotic Surgical Systems	145
Table 4-4	148
Types of Spinal Pathology and Disorders	148
Table 4-5	149
Types of Spinal Deformities	149
Table 4-6	150
Types of Spinal Disorder Treatments	150
Figure 5-1	166
Alliance Spine Nakoma SL Anterior Cervical Plating System	166
Figure 5-2	167
Alliance Spine Alamo C	167
Figure 5-3	173
Boston Scientific SCS System: 32 Contacts and 32 Dedicated Power Sources	173
Figure 5-4	174
Brainlab Collaborative Workspace	174
Figure 5-5	175
Brainlab AG Worldwide Presence, Headquarters in Germany	175
Figure 5-6	179
Captiva Spine Pedicle Screw System	179
Figure 5-7	181
Elekta Gamma Radio Surgery System	181
Figure 5-8	187

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

Globus Medical Spine Surgery Products	187
Table 5-9	191
Mazor Revenue, 2010-2015	191
Table 5-10	193
Mazor Robotics Strategy Key Elements	193
Table 5-11	193
Mazor Robotics Commercialization of Renaissance System	
Strategy Key Elements	193
Table 5-12	194
Mazor Robotics Utilization Of Installed Base Strategy Key Elements	194
Table 5-13	195
Mazor Robotics Clinical And Financial Value Strategy Key Elements	195
Table 5-14	196
Mazor Robotics Research And Development Strategy Key Elements	196
Table 5-15	197
Basic Steps for Surgical Workflow Using Mazor Renaissance Robot	197
Figure 5-16	199
Mazor Surgical Planning Software Provides A Slice-By-Slice Image Display	199
Figure 5-17	200
Mazor Surgical Robot: 3D Marker; C-arm in 2 positions taking registration images for 3D Synchronization process	200
Figure 5-18	201

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

Mazor RBT Device (with an arm connected to it) on Clamp Mount ready to guide the surgeon	201
Figure 5-19	205
Medtronic / Covidian Integration	205
Table 5-20	213
Medtronic Principal Products Offered by Spine Division:	213
Table 5-21	217
Medtronic Spine Division Principal Products	217
Table 5-22	218
MicroPort® Advanced Technology Product Segments Addressed	218
Table 5-23	220
Microport Hip Systems	220
Figure 5-24	224
Precision Spine Cervical Spine Devices	224
Figure 5-25	229
SIGNUS Medical Sacroiliac Joint Medical Device	229
Figure 5-26	246
Stryker Joint Implants	246
Figure 5-27	248
Stryker Patient Specific Pre-Operative Planning	248
Figure 5-28	249
Stryker Patient Specific Pre-Operative Planning	249

Spinal Surgical Robot Table of Contents**and List of Tables and Figures**

Table 5-29	250
Stryker Better Fit Orthopedics	250
Table 5-30	251
Stryker Osteoarthritis Affects Compartments Of The Knee	251
Figure 5-31	252
Stryker / MAKO Surgical RIO Robotic Arm Interactive System	252
Figure 5-32	260
MAKO Surgical Restoris	260
Figure 5-33	262
Mako Robotic Arm Technology Assists in Total Hip Replacement	262
Figure 5-34	263
MAKO Surgical	263
Figure 5-35	264
MAKO Surgical Implants	264
Table 5-36	269
MAKO Robotic Surgery Benefits	269
Figure 5-37	273
Mako Robotic Arm Technology Assists in Total Hip Replacement	273
Table 5-38	278
MAKO Robotic Surgery Benefits	278
Figure 5-39	292
Zyga Technology Slimmetry System	292

Spinal Surgical Robot Table of Contents

and List of Tables and Figures

Table 5-40	298
Zimmer Biomet Musculoskeletal Healthcare Offerings	298
Table 5-41	300
Zimmer Metal On Metal Hip Replacement Difficulties and Side Effects.	300