

MEDICAL ROBOTICS TECHNOLOGY & MARKET ANALYSIS 2017

Market & Technology report - November 2017

Medical robotics is opening a new wave of opportunities for sensor makers, established medical devices manufacturers and also newcomers.

KEY FEATURES OF THE REPORT

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- Introduction to medical robots' technology and market landscapes
- Comprehensive market analysis of each segment, covering surgical robots, rehabilitation robots (exoskeletons, prosthetics, orthotics), and robots for ambulatory and hospital care
- Funding, investments and acquisitions
- First-level IP analysis of surgical robots and exoskeletons
- Market data and forecasts for 2016 - 2022, and 2016 market share for each segment
- Roadmaps: How will the industry evolve?
- Sensors for medical robotics
- Company profiles, with pictures and technology descriptions

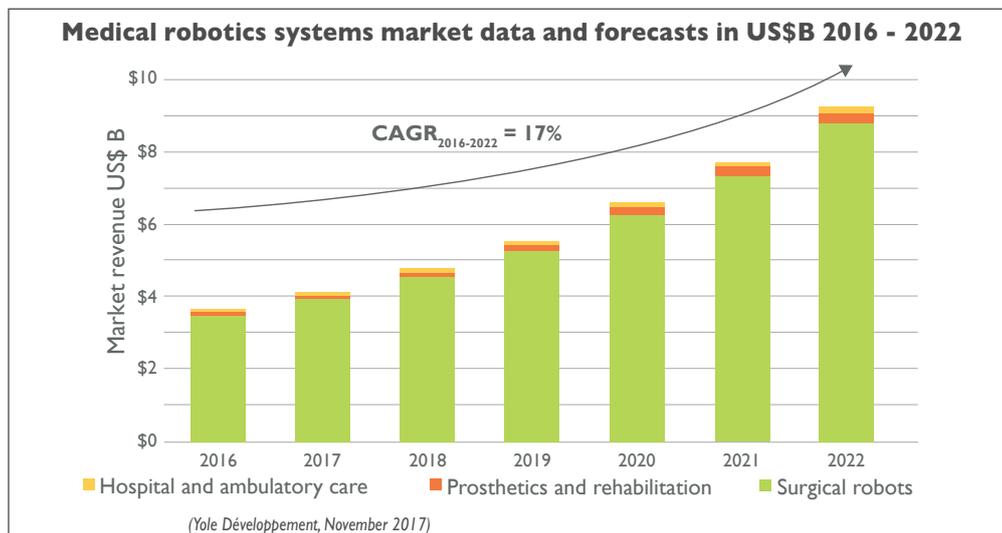
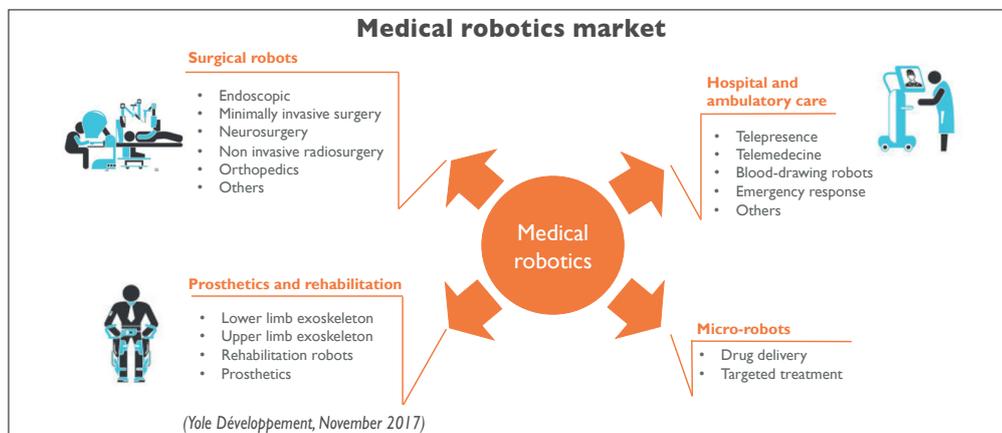
WHY ARE ROBOTICS NEEDED IN THE MEDICAL FIELD, AND HOW IS MEDICAL ROBOTICS RESHAPING THE HEALTHCARE SYSTEM?

Robotics has a long, colorful history, but its applications have only recently impacted the healthcare industry. In 2000, the field's current main player, Intuitive Surgical, was one of the first firms to bring a surgical robot to market. At the time, the company's marketing was centered on remote surgical procedures. However, the ensuing years have seen the applications of this life-changing technology increase exponentially, to the point where the possibilities enabled by today's medical robots are endless. Each "participant" sees added value in this technology: minimal invasiveness for the patient, enhanced microsurgery and precision capabilities for the surgeon, and cost optimization for the healthcare system due to patients' shorter recovery time.

Another major component of medical robotics technology is rehabilitation robotics. Indeed,

the 500,000 people affected by spinal cord injury (SCI) every year worldwide, along with stroke patients and neurodegenerative disease patients (among others) could greatly benefit from this technology. Powered exoskeletons, rehabilitation robots and orthotics, artificial limbs: the total accessible market is huge and the extraordinary benefits will enhance market penetration.

In light of recent advances in telemedicine, telepresence robots are the perfect tools for bringing medical expertise to the point of need while decreasing costs by allowing the patient to be treated at home. Telepresence robots can also be used to protect workers against infectious diseases by allowing caregivers to stay at a safe distance from infected patients.



The medical robotics market will experience an impressive 17% compound annual growth, from \$3.7B in 2016 to \$9.3B in 2022. This growth will be mainly driven by the surgical robots segment, which represents about 94% of the medical robotics market

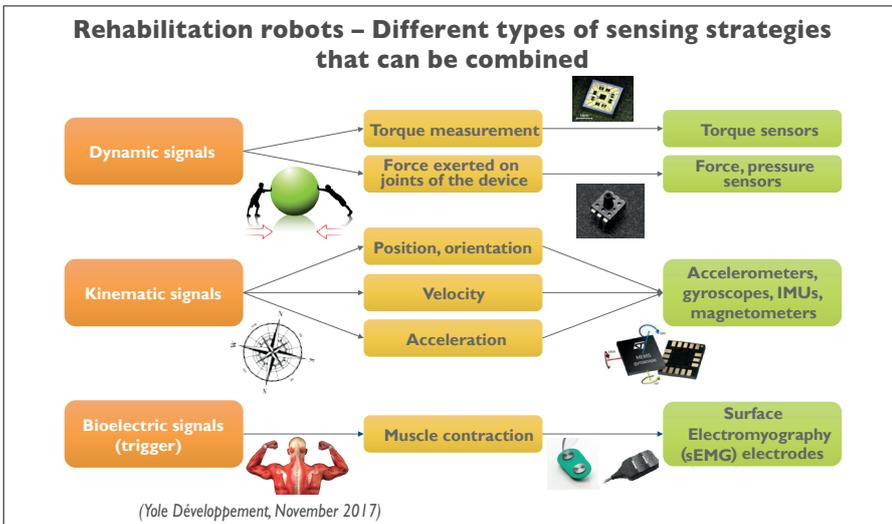
(\$3.4B in 2016). However, due to a big difference in ASP, rehabilitation and prosthetics robots, along with hospital and ambulatory care robots, represented 87% in terms of units sold.

A ROBOT IS A MACHINE THAT SENSES, THINKS, AND ACTS: HOW ARE SENSORS KEY ENABLERS OF THIS TECHNOLOGY?

Numerous sensors are required for a robot to function and sense its environment: position and torque sensors for the articulations, gyroscopes and accelerometers for positioning and moving parts, pressure sensors, image sensors, surface electromyography and neuronal implants as a trigger signal for the exoskeleton, and many other sensor types. These sensors can be divided into two groups: 1) key enabler sensors, and 2) other sensors not specifically developed for medical robotics applications.

In the field of surgical robotics, surgeons want technology that allows them to “feel” the body’s tissue remotely, a process called “haptic sensing”, as well as better camera-image quality since the surgical robot functions as the surgeon’s hands and eyes. Both issues can be addressed using new sensor types: haptic sensors and high-resolution CCD or CMOS cameras. Another trend, already observed in the endoscopy market, is the move towards disposable image sensors to achieve a disposable laparoscope. This trend is not yet visible in the surgical robots market, but it will probably surface in the future as regulations evolve towards more disposable scopes. This would completely change the number of cameras sold to surgical robot-makers, shifting from a single camera per robot to as many as one camera per surgery.

In the field of rehabilitation robotics and prosthetics, different sensor strategies have been identified and can be used separately or combined together: dynamic control with torque and force sensors, kinematic control with inertial sensors, and trigger control with myoelectric sensors. Thus, a single rehabilitation robot can embed dozens of sensors.



WHO IS DRIVING MEDICAL ROBOTICS’ GROWTH, AND WHO ARE THE NEWCOMERS?

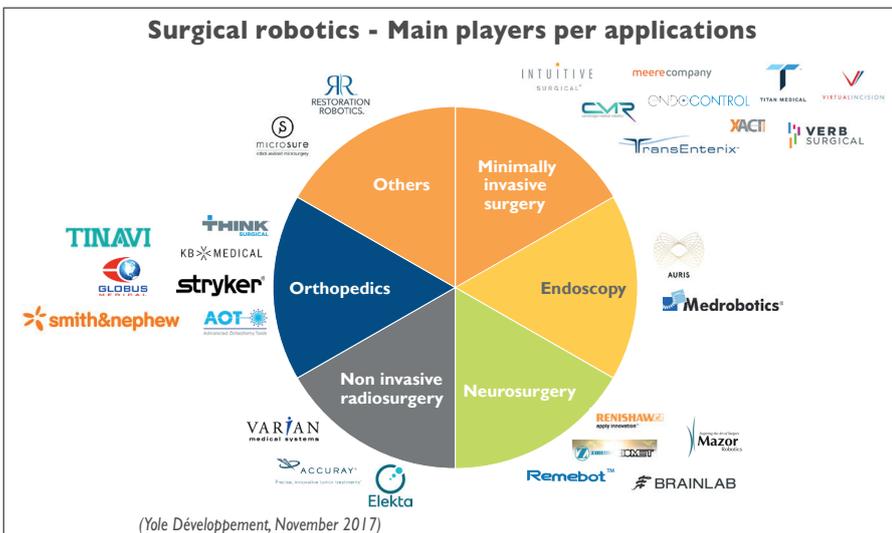
For more than a decade, Intuitive Surgical has had a quasi-monopoly on the field of minimally invasive robotic surgery. But newcomers like Cambridge Medical Robotics and TransEnterix are now entering the market with new technologies. Also, in the last few years Medtronic has made two major moves into surgical robotics: its acquisition of Covidien for \$50B, and its emergence as Mazor Robotics’ lead

investor. Medtronic-Covidien owns an extensive patent portfolio in the surgical robotics field, and the company should be watched closely over the next few years since they are probably working on a new product.

In December 2015, Google’s Alphabet and Johnson & Johnson announced the formation of Verb Surgical, the offspring of a strategic partnership between Ethicon, a medical devices subsidiary of Johnson & Johnson, and Verily Life Sciences, formerly known as Google Life Sciences. Verb Surgical is building a digital surgery platform combining robotics, advanced visualization, advanced instrumentation, data analytics, and connectivity. Verb surgical will certainly be an important challenger to Intuitive Surgical.

Rehabilitation robotics and smart prosthetics are very dynamic fields, with established players like Hocoma leading the market along with many newcomers in the field of powered exoskeletons for upper and lower limbs. With the first exoskeletons (ReWalk Robotics, Ekso Bionics) now FDA-approved for certain conditions, the market is booming thanks to equipment leasing to rehabilitation centers and the emergence of personal-use systems.

This report reveals the medical robotics market’s dynamics, players, and technological challenges.



OBJECTIVES OF THE REPORT

The objectives of the report are to :

- Explain the challenges linked to medical robotics, and their current and future applications
- Offer a technical and economical segmentation of the medical robotics field: surgical robots, rehabilitation and prosthetics robots, ambulatory and hospital care robots
- Give an overview of medical robots' history, from first developments to present day, along with a presentation of main players and their respective technologies
- Furnish market data, forecasts, and analysis, and explore the different present and future business models for each segment
- Detail the limits of current technology and how it might evolve in the future. Discuss the main challenges, and how medical robot companies can overcome them. What do end-users expect? How will the healthcare industry be impacted?
- Provide a focus on sensors for medical robots

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