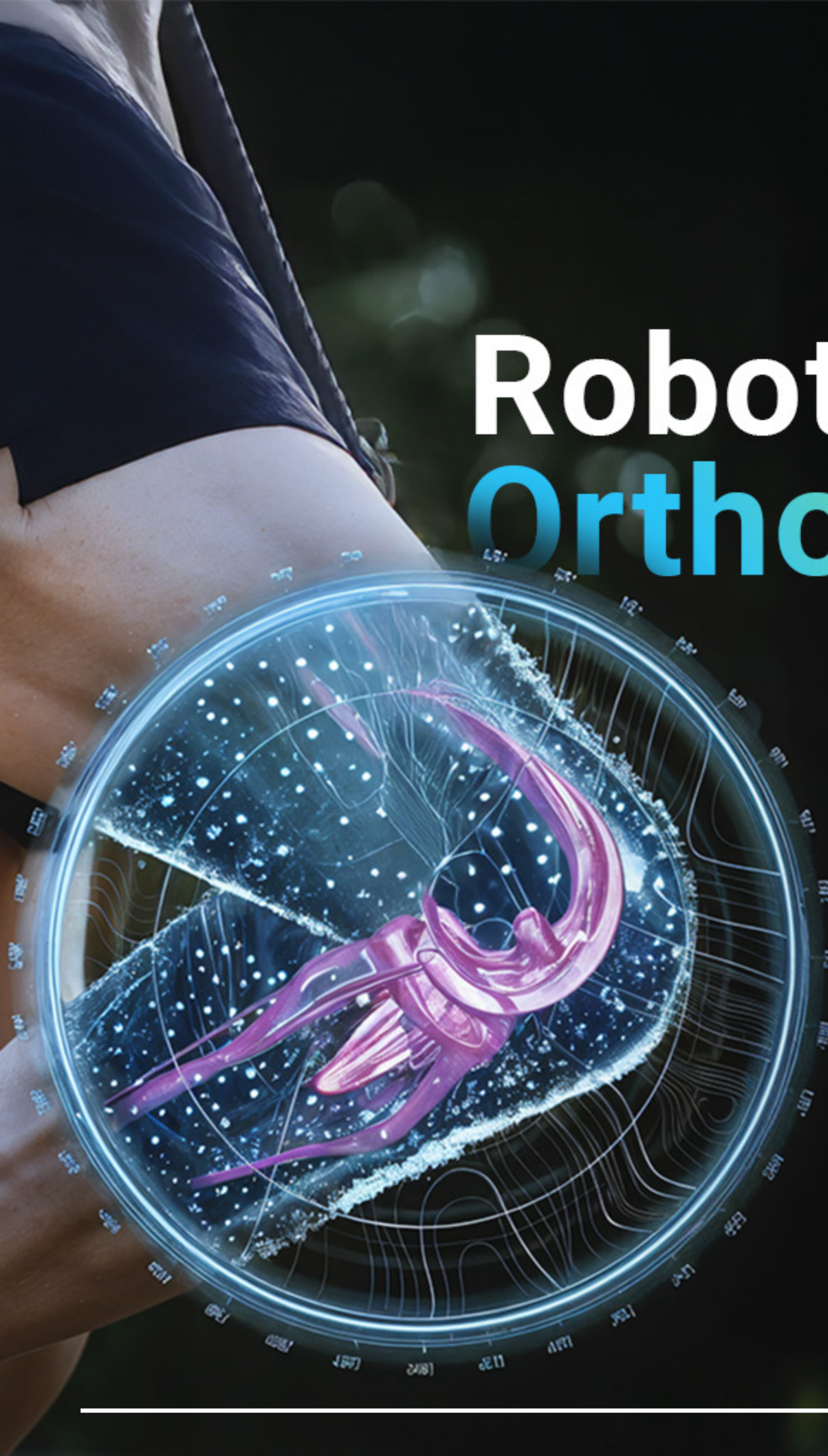


Robotics in Orthopaedics



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How is Robotics Redefining the Orthopaedics Sector?

The use of robotics in orthopaedics is revolutionising joint replacement & reconstruction, offering enhanced precision with improved patient outcomes.



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Challenges with Traditional Orthopaedic Treatment

-  Longer Recovery & Rehabilitation Time
-  Increased Soft Tissue Damage
-  Limited Precision in Bone Cutting & Alignment
-  Difficulties in Revision Surgeries, Obesity, and Deformities
-  Surgeon Fatigue & Ergonomic Strain

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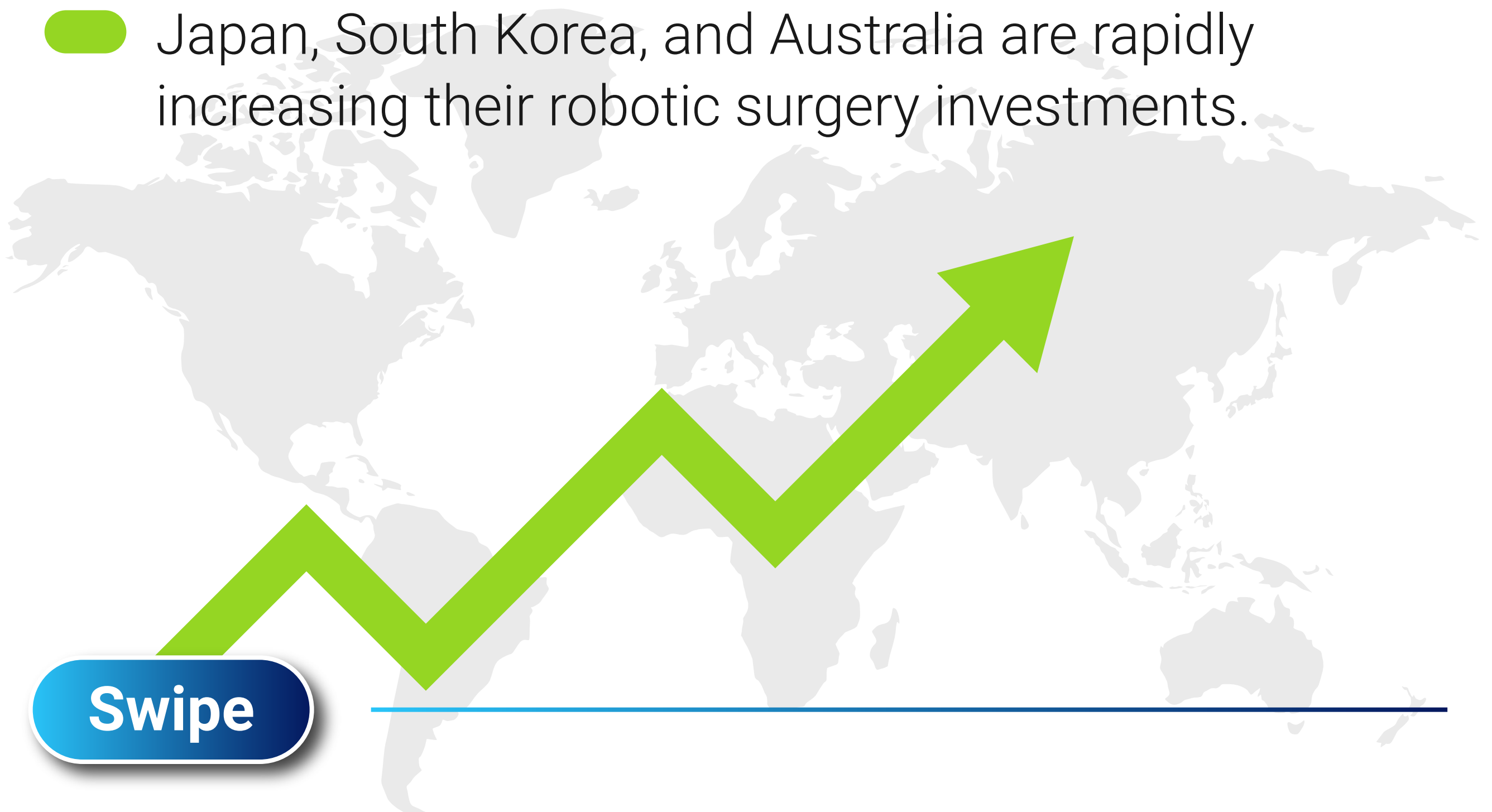
Robotic-assisted Orthopaedic Surgery is on the Rise

- Driven by demand for minimally invasive and precise joint surgeries.
- As robotic systems like Mako (Stryker) and ROSA (Zimmer Biomet) dominate total knee and hip arthroplasty.
- Due to advances in shoulder and elbow arthroplasty.
- Facilitating enhanced preoperative planning and intraoperative guidance through AI-driven robotics.

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Regional Growth Trends

- The U.S. leads in robotic-assisted surgeries, followed by Germany, UK, France, Italy, and Spain in Europe.
- Japan, South Korea, and Australia are rapidly increasing their robotic surgery investments.



Identifying Unmet Needs & Exploring Whitespaces

- Robotic surgery is limited to high-end hospitals, leaving mid-tier facilities untapped.
- Current systems prioritise standardised procedures, but the future lies in patient-specific implants & AI-driven personalisation.
- Shoulder and elbow robotics remain underdeveloped, with the market focused on knee & hip replacements—offering major growth potential.
- High CAPEX opens opportunities for leasing models and cost-efficient alternatives.

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Global Leaders in Robotic Orthopaedics

stryker

 ZIMMER BIOMET

Smith+Nephew

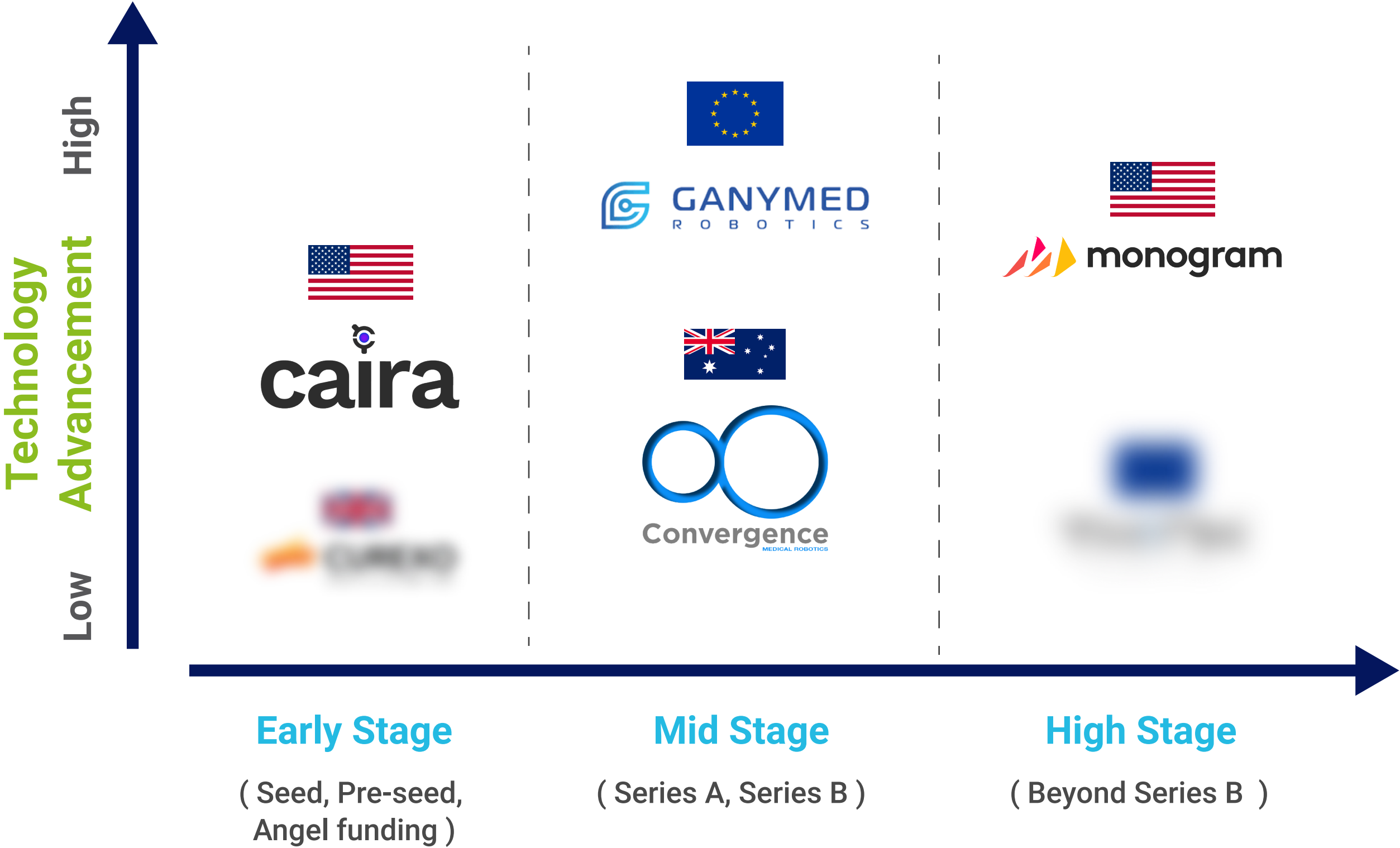
 **Medtronic**

 **DePuy Synthes**

PART OF THE *Johnson & Johnson* FAMILY OF COMPANIES

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Emerging Startups in Orthopaedic Surgery



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