

C-Arms Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The C-arms market was valued at USD XX million in 2021. It is expected to witness a revenue of approximately USD XX million in 2027, with a CAGR of 4.3% over the forecast period.

The COVID-19 pandemic is expected to have an impact on the C-arms market. C-arms are used in image-guided procedures that are mostly elective, which were postponed due to COVID-19. This postponement also resulted in hospitals deterring investments in high-cost capital equipment during the pandemic, as they focused more on ventilators or other COVID-19 treatment supporting equipment. According to a study published in the British Journal of Surgery, in May 2020, based on a 12-week period of peak disruption in the hospital services due to COVID-19, around 28.4 million elective surgeries worldwide were canceled or postponed in 2020. More than 580,000 planned surgeries in India were canceled or delayed due to the COVID-19 pandemic. However, according to the European Association of Urology guideline, while handling COVID-19 positive patients needing surgery, a specially equipped operating room needs to be designed, where a mobile C-arm fluoroscopic X-ray system for radiology and healthcare professionals will be needed for operating. Hence, considering the rising cases of COVID-19 and their significant effect on healthcare systems across the region, the market is projected to continue the steady growth rate trajectory during the forecast period.

The major factors driving the market's growth include the rising geriatric population, increasing incidence of chronic diseases, advancements in maneuverability and imaging capabilities, and increasing demand for imaging technologies from emerging economies.

Imaging systems are becoming an essential technology found in nearly all well-equipped hospitals. Specialists in surgery, orthopedics, traumatology, vascular surgery, and cardiology use C-arms for intraoperative imaging. The devices provide high-resolution X-ray images in real-time, which help physicians monitor progress at any point during the operation and immediately make necessary corrections. As a result, treatment results are better, with faster recovery. C-arms are currently being used in several areas of medicine, and their applications are expected to increase over time. These factors, along with the

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increasing demand for healthcare infrastructure in developing countries, are driving the C-arms market. The emerging market economies include India, Mexico, Russia, Pakistan, Saudi Arabia, China, and Brazil. Critically, an emerging market economy is transitioning from a low income, less developed, often pre-industrial economy toward a modern, industrial economy with a higher standard of living. The primary reason for the rising demand for C-arms is rising healthcare expenditure, continuous advancement in the products, and increasing surgical procedures.

The burden of cancer is continuously increasing in India. According to the World Health Organization, in 2020, about 1,324,413 new cancer cases were reported in India. Similarly, according to the GLOBOCAN, in 2020, around 27,885 new cancer cases were reported in Saudi Arabia, with about 13,069 cancer-related deaths. Companies are constantly expanding and introducing new products in these emerging countries. For instance, in January 2020, Trivitron Healthcare, an India-based company, launched Elite - Flat Panel Digital C-arm with motorized movements. The rising number of hospitals and clinics and advancing healthcare infrastructure in these countries are leading to the growing adoption of technologically advanced C-arm systems, such as digital C-arms. However, the high cost of C-arm systems and the growing use of refurbished devices may restrain the market studied.

C-Arms Market Trends

The Mini C-arm Segment is Expected to Show Better Growth During the Forecast Period

The mini C-arm segment is expected to record a healthy CAGR during the forecast period. With an increasing focus on the portability of C-arms, there is a significant market opportunity for companies producing mini C-arms. Several mini C-arms are designed explicitly for extremity imaging. They have a smaller footprint and increased mobility compared to the full-size C-arms. Currently available systems in the mini C-arm category vary significantly in size and cost depending upon the functionalities offered. Manufacturers are differentiating their products based on mobility, the field of view, and alternate imaging technologies. For instance, OrthoScan Inc.'s FD Pulse is the world's first mini C-arm equipped with pulsed fluoroscopy.

The mini C-arms segment is expected to witness several product launches during the forecast period, as companies are upgrading their product offerings at a fast pace. For instance, in September 2019, Orthoscan Inc. (the sister company of Ziehm Imaging) launched the Orthoscan TAU family of innovative mini-sized C-arms, representing a new generation of mini-sized C-arms from the manufacturer. Hence, due to such factors, the rising geriatric population, and the increasing incidence of chronic diseases, the mini C-arm segment is expected to witness significant growth over the forecast period.

North America Held the Major Share in the Market Studied. It is Expected to Dominate the Market During the Forecast Period

North America is expected to hold a major market share over the forecast period, with the United States holding the largest market share within the North American region. This large share is due to the high standards of healthcare infrastructure in the United States, along with the high frequency of diagnostic examination, rising geriatric population, and increasing prevalence of chronic diseases in the country.

For instance, according to the estimates of the American Heart Association, in 2018, cardiovascular diseases accounted for nearly 836,546 deaths in the United States, which is about one in every three deaths in the country. Also, some of the significant risk factors, such as smoking and high blood pressure, are increasing in the country due to the sedentary lifestyle of the population. Moreover, as per the Census Bureau estimates, the geriatric population (65 years or older) in the United States is expected to increase from around 56 million in 2020 to 94 million by 2060. The increasing geriatric population is expected to increase the number of surgeries, thus boosting the overall market.

The increasing trend of new product approvals and launches, along with the development of advanced technologies, plays a vital role in the growth of the C-arms market in the region. For instance, in May 2019, ControlRad Inc. received the US Food and Drug

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Administration (FDA) 510(k) clearance for its ControlRad Trace, which can be integrated into existing mobile C-arms to reduce radiation in any fluoroscopic imaging procedure. Thus, due to such factors, the North American C-arms market is expected to witness significant growth over the forecast period.

C-Arms Market Competitor Analysis

The C-arms market is consolidated and highly competitive. The key players include GE Company (GE Healthcare), Siemens Healthineers, Canon Medical Systems Corporation, Ziehm Imaging GmbH, and Fujifilm Holdings Corporation. Major players are consistently trying to gain a competitive advantage through product innovations and upgrades in existing product lines. The mobile C-arm segment is noticing intense competition due to several mergers and acquisitions. For instance, in August 2020, Ziehm Imaging announced the acquisition of Therenva, a planning and imaging software tools developer for cardiovascular procedures. Through this acquisition, Ziehm Imaging aims to leverage its strong distribution network of mobile C-arm systems to market Therenva's current product portfolio globally.

Additional Benefits:

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

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