

Europe C-Arms - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

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Report description:

The Europe C-Arms Market size is estimated at USD 656.89 million in 2024, and is expected to reach USD 823.71 million by 2029, growing at a CAGR of 4.63% during the forecast period (2024-2029).

COVID-19 has had an unprecedented impact on the growth of the mobile c-arms market. As with the upsurge in COVID-19 cases, many elective surgeries were halted or postponed. According to the study published in Porto Biomedical Journal in February 2021, in In England and Wales, 3,102,674 surgical procedures were conducted in 2020, compared to the predicted 4,671,338. The amount of surgery performed nationally decreased by 33.6%. A total of 1,568,664 procedures were canceled or postponed. Since C-arms are used in image-guided procedures that are mostly elective and were postponed due to COVID-19, such a delay in elective surgeries has impacted the growth of the market. Moreover, since lockdown constraints were removed, the industry has been recovering strongly. The rise in hospital visits and an increase in elective treatments have been driving the market recovery.

The market is primarily driven by factors such as advancements in maneuverability and imaging capabilities, the rising prevalence of chronic diseases, and the growing geriatric population. For instance, according to the British Heart Foundation England Factsheet, published in January 2022, about 6.4 million people will be living with cardiovascular diseases in England in 2021. Also, as per the same source, around 7.4 million people will be living with heart and circulatory diseases in the United Kingdom in 2021. As a result, the growing prevalence of the cardiovascular disease is anticipated to fuel demand for C-Arm, which can be used to diagnose, assess, and evaluate coronary artery disorders and cardiomyopathy and detect potential heart damage from chemotherapy or radiotherapy. Additionally, as per the September 2021 report of the World Health Organization (WHO), about 55 million people around the world are living with dementia, and nearly 10 million cases are reported every year. Also, as per the same source, Alzheimer's is the most common form of dementia and constitutes about 60-70% of the total cases of dementia. Thus, the growing prevalence of dementia is expected to rise in demand for imaging diagnosis, thereby boosting the

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demand for C-arm devices over the forecast period.

Moreover, various strategies adopted by the market players, such as product launches, mergers, and acquisitions, are likely to support the market's growth over the forecast period. For instance, in May 2021, Turner Imaging Systems received the CE Mark for its Smart-C Mini C-Arm portable fluoroscopy x-ray imaging device. With the approval, the Smart-C will be one of the world's first highly portable mini c-arms to be distributed throughout the EU countries and the United Kingdom.

Thus, all the above-mentioned factors are expected to boost the market over the forecast period. However, the high cost of equipment may restrain market growth over the forecast period.

Europe C-Arms Market Trends

Oncology Segment is Expected to Show a High Growth Over the Forecast Period

C-arms have radiographic capabilities and are typically utilized for intraoperative imaging during surgical, orthopedic, and emergency care operations. C-arm was viable and effective for localized malignancy. The oncology segment is expected to witness significant market growth over the forecast period owing to factors such as the rising prevalence of cancer in Europe. For instance, according to Breast Cancer Factsheet Now 2021, every year, around 55,000 women and 370 men in the United Kingdom are diagnosed with breast cancer. Breast cancer has claimed the lives of an estimated 600,000 persons in the United Kingdom. This figure is expected to climb to 1.2 million by 2030. Thus, the rising cancer burden is predicted to increase demand for imaging diagnosis and, as a result, demand for C-arm, supporting segment growth.

Additionally, during the course of the projection period, it is anticipated that increasing financing and initiatives for treatment can accelerate market expansion in Europe. According to an article published by the European Research Executive Agency in May 2022, the European Commission wants to encourage equal access to cancer prevention and treatment while assisting medical professionals through an inter-specialty training program. Furthermore, according to the same source, the Europe Beating Cancer Plan got a total of EUR 4 billion in funding in 2021, including EUR 1.25 billion from the subsequent EU4 Health Search for readily accessible translations of the prior program. The program aims to focus on how to increase equal access for all to cancer prevention and care. Such initiatives raise awareness about the detection of cancer which is likely to propel the demand for C-arm diagnosis, thereby boosting the segment growth.

Thus, all aforementioned factors are expected to boost segment growth over the forecast period.

The United Kingdom is Expected to hold Significant Market Share in C-Arm Market Over the Forecast Period

The United Kingdom holds a significant share of the studied market due to factors including the increased prevalence of chronic diseases, the rising geriatric population, developments in medical imaging technologies, a robust healthcare system, and others. The Future of an Ageing Population report by the Government Office of Science estimated that by 2040, one in seven people in the country is projected to be aged over 75. Chronic diseases such as orthopedic and musculoskeletal are more common in the senior population, which is projected to raise demand for better diagnostic tools and hence for C-arm diagnosis, propelling market expansion.

Additionally, the growing burden of chronic diseases is likely to support the growth of the market over the forecast period. For instance, according to the Versus Arthritis 2021 article, 20.3 million people had a musculoskeletal (MSK) condition such as arthritis or back pain in the United Kingdom, which accounted for almost one-third (32%) of the population in 2021. The high burden of musculoskeletal disease in the country is projected to increase the demand for C-Arm devices to diagnose the underlying conditions of the bones, thereby positively influencing the regional market's growth.

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Thus, all aforementioned factors are expected to boost market growth over the forecast period.

Europe C-Arms Industry Overview

The C-arms market is moderately competitive and is highly competitive. Some of the players in the Europe C-Arms market are Canon Medical Systems Corporation, GE Healthcare, Hologic Inc, Koninklijke Philips N.V, Shimadzu Corporation, Siemens AG, and Ziehm Imaging GmbH.

Additional Benefits:

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

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