

Fluoroscopy Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Fluoroscopy Devices Market size is estimated at USD 5.39 billion in 2024, and is expected to reach USD 6.81 billion by 2029, growing at a CAGR of 4.79% during the forecast period (2024-2029).

COVID-19 had a significant impact on the fluoroscopy devices market since a lot of diagnostic centers were shut down due to the lockdown. For instance, as per the article published in August 2021 by PubMed, the COVID-19 period was linked to a decrease in radiological outpatient activity. Several variables, including parental fear about traveling during a lockdown, their children's perceived well-being, an increase in mental health issues, or difficulty coping with ordinary tasks, root the reason for the decreased radiological outpatient activity. However, since the restrictions were eased, the sector has been recovering strongly. Over the last two years, increased fluoroscopy device sales, new product launches, and increased demand for minimally invasive surgeries have led the market recovery.

The fluoroscopy devices market is primarily driven by the rising prevalence of chronic diseases and the increasing use of fluoroscopy in pain management. The increase in the aging population and changes in societal behavior are contributing to a steady rise in these common and costly long-term health problems. According to the American Cancer Society Cancer Facts and Figures 2022 report, the estimated numbers of new cancer cases are likely to be 1.9 million in the United States. The most affected would be the emerging markets, as population growth is anticipated to be most significant in developing areas. Furthermore, the use of fluoroscopy in pain management is expected to supplement the development of the market. For instance, as per the article published in April 2022 by PubMed, C-arm fluoroscopy is a beneficial tool for interventional pain management. Furthermore, a suitable fluoroscopic mode (pulsed mode, low dose mode), collimation, and a laser aiming line are beneficial in lowering patient and physician exposure to the primary X-ray beam and scattered radiation.

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Furthermore, the rising demand for minimally invasive surgery and the growing geriatric population are the main factors boosting the market growth. For instance, an article published in March 2022 in BMC journal stated that the confidence of surgeons in minimally invasive techniques is higher for simple surgical interventions such as appendectomy, cholecystectomy, and abdominal exploration. Furthermore, per the WPP 2022, the share of the global population aged 65 years or above is projected to rise from 10% in 2022 to 16% in 2050.

Hence, considering the factors mentioned above. The fluoroscopy devices market is anticipated to witness growth over the forecast period. However, the side effects of radiation and the rising adoption of refurbished systems are expected to hinder market growth over the forecast period.

Fluoroscopy Devices Market Trends

Cardiovascular Segment is Anticipated to Witness Growth over the Forecast Period

The cardiovascular segment is expected to witness growth over the forecast period due to the rising prevalence of cardiovascular diseases worldwide. For instance, per the BHF 2022 report, vascular dementia is likely to affect at least 150,000 people in the United Kingdom in 2022, and the number is predicted to rise to 350,000 by 2030. Hence, the high prevalence of cardiac diseases is anticipated to be the driving factor for the cardiology fluoroscopy device market.

Furthermore, cardiovascular procedures require extensive fluoroscopic guidance to navigate endovascular catheters. The fluoroscopy provides excellent spatial and temporal resolution, limiting exposure to ionizing radiation to the patients and staff, along with poor soft tissue characterization. In cardiac catheterization, fluoroscopy is used to help the healthcare provider see blood flow through the coronary arteries to check for arterial blockages. For instance, as per the article published in September 2022 by NLM, fluoroscopic guided percutaneous coronary intervention is a standard treatment for coronary artery disease. The study discussed the significance of fluoroscopically guided percutaneous coronary intervention and the role of the interprofessional team in performing this treatment.

Furthermore, the presence of competitors, mergers, acquisitions, and collaboration in the field of cardiology fluoroscopy is anticipated to boost the market growth. For instance, in August 2022, Royal Philips, a health technology company, showcased its latest integrated cardiology solutions at the ESC Congress (Barcelona, Spain). The company's newest innovations in cardiology help provide enhanced clinical insights, strengthen clinical confidence, drive efficiency in critical care and improve cardiac care experiences from diagnosis and treatment to home care. Philips showed its cutting-edge EchoNavigator software that allows users of its EPIQ CVxi interventional cardiology ultrasound system to automatically fuse real-time 3D TEE (transesophageal echocardiography) with cardiac fluoroscopy X-ray imaging to monitor and assist catheter-based cardiac operations.

Hence, considering the above facts, the cardiology segment is expected to grow over the forecast period.

North America is Expected to Witness Growth over the Forecast Period

The North American fluoroscopy market is projected to grow significantly due to the well-established healthcare infrastructure, the growing burden of chronic diseases, and critical market players actively participating in new product developments and launches.

The United States is anticipated to contribute a significant share in the diagnostic imaging market, which can be attributed to the increasing technological advances, higher affordability rates from the population, and the number of diagnostic procedures increasing every year. In September 2021, Siemens Healthineers launched Luminos Impulse, a fluoroscopy system with a new design and features shared by high-end fluoroscopy systems, including a seamless imaging chain, comprehensive dose

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optimization, cybersecurity features, and detector-sharing capabilities for radiography. Moreover, the growing number of neurological disorders, such as brain tumors, is also expected to propel market growth. According to the NBTS, an estimated 700,000 people in the United States live with a primary brain tumor, and approximately 88,970 more are likely to be diagnosed in 2022. Furthermore, the increasing incidence of chronic diseases like cancer requiring fluoroscopy will likely boost the market growth over the forecast period. For instance, as per the American Cancer Society 2022 report, about 287,850 new cases of invasive breast cancer is likely to be diagnosed in women in 2022 in the United States.

Thus, considering the factors above, the market is expected to propel in this region during the forecast period.

Fluoroscopy Devices Industry Overview

The market is moderately consolidated, owing to a few significant players. The major market players are focusing on technological advancements and reducing the side effects of the procedures. Some of the major players in the market are Canon Medical Systems Corporation, Carestream Health, General Electric Company (GE Healthcare), Hitachi Medical Systems, Hologic Inc., Koninklijke Philips NV, Shimadzu Medical, and Siemens Healthineers, among others.

Additional Benefits:

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

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