

## **Global Mobile C-arm - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The Global Mobile C-arm Market size is estimated at USD 1.5 billion in 2024, and is expected to reach USD 1.88 billion by 2029, growing at a CAGR of 4.70% 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 for the time being. For instance, the PLOS ONE Journal article titled "The Impact of the COVID-19 pandemic on waiting times for elective surgery patients: A Multicenter Study" published in July 2021 reported that elective procedure incidence decreased rapidly at the onset of the first COVID-19 wave in March 2020. It was also reported that in May 2020 and thereafter until November, waiting times were longer, with monthly increases varying between 7% and 34% in elective surgeries. Further, the waiting times were longer in 2020 for gastrointestinal and genitourinary diseases and neoplasm surgeries. 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.

Factors such as the growing burden of chronic diseases, technological advancement in imaging capabilities, and the launch of new products in the market are propelling the growth of the market. The growing burden of chronic disease and surgeries is also propelling the growth of the market. For instance, Thoracic Cardiovascular Surgery Journal article titled "German Heart Surgery Report 2020: The Annual Updated Registry of the German Society for Thoracic and Cardiovascular Surgery", published in June 2021, there was a total of 92,809 operations classified as heart surgery procedures in the classical sense, of which 29,444 were isolated coronary artery bypass grafting procedures, 35,469 were isolated heart valve procedures. Thus, a high number of heart procedures and operations are being performed around the world, which is expected to drive the growth of the mobile C-arms market.

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Additionally, the increasing focus of market players on improving the efficiency and workflow of the system through the advancements in the products is also propelling the growth of the market. For instance, in July 2020, Philips Healthcare reported two major innovations to its Zenition mobile C-arm platform, which now includes a new Table Side User Interface and an extension integrating intravascular ultrasound (IVUS). With the change to the Table Side User Interface, clinicians will be able to operate the C-arm inside a sterile field and IVUS for peripheral vascular procedures, potentially streamlining activity and workflow in the operating room. Such advancements are also boosting the growth of the market.

However, the high procedural and equipment costs and a lack of skilled professionals may hinder the growth of the market over the forecast period.

## Mobile C-arms Market Trends

### Mini C-arms Segment of the Market Is Expected to Show Significant Growth Over the Forecast Period

The mini c-arms segment is expected to show significant growth over the forecast period, owing to factors such as the rising burden of road injuries, trauma, and orthopedic diseases, technological advancement in medical imaging; and increasing focus by market players on the segment due to the advantages of mini c-arms.

The Mini C-arms are one of the ideal solutions for fluoroscopy of the extremities at minimized dose levels. Due to their lightweight, the systems are easy to handle in small spaces and operating rooms and guarantee ease of transfer between exam rooms. Such advantages of the mini c-arms are expected to propel the growth of the segment in the near future.

Additionally, the approval from the regulatory authority is also boosting the growth of the market segment. 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 as well as the United Kingdom.

Furthermore, the distribution agreements among the market players are also driving the growth of the segment. For example, Turner Imaging Systems signed a Master Resellers agreement in July 2020 that will add the Smart-C Mini C-Arm to Siemens Healthineers' portfolio of radiology and imaging products. With this agreement, Siemens Healthineers becomes the premium partner reseller for the hospital market and will focus on delivering the Smart-C to their hospital, IDN, GPO, and military customers in the United States. Such agreements help in global expansion and thus boost the growth of the market segment. Thus, owing to the above-mentioned factors, the market segment is expected to project significant growth over the forecast period.

### North America Holds Major Share in Market and Expected to Grow Over the Forecast Period

The North American region holds the major share in the market owing to factors such as the growing burden of chronic diseases, technological development in medical imaging coupled with well-developed healthcare infrastructure, and others.

The growing burden of chronic diseases in the region is also driving the growth of the market. For instance, the Centre for Disease Control and Prevention (CDC) article titled "Chronic Kidney Disease in the United States, 2021", released in March 2021, reported that more than 1 in 7 adults in the United States are estimated to have chronic kidney disease. That accounts for nearly 15% of United States adults or 37 million people. Since mobile c-arms help in visualizing kidney drainage, the high burden of such diseases is expected to drive the growth of the market.

The approval of technologically advanced products by regulatory authorities such as the United States Food and Drug Administration and Health Canada is also propelling the growth of the market in the region. For instance, in January 2021,

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Siemens Healthineers received Food and Drug Administration (FDA) clearance for Cios Flow. It is a mobile C-arm with broad multidisciplinary functionality as well as a robust level of cybersecurity to help enable a secure, efficient operating room.

Furthermore, the strategic initiatives taken by the market players, such as collaboration and distribution agreements to increase their geographical presence, are also augmenting the growth of the market. For instance, in April 2021, Carestream Health reported the addition of a mobile C-arm to its growing innovative product portfolio known as the Ziehm Vision RFD C-arm under a partnership with Ziehm Imaging. As per the agreement, Ziehm Vision RFD systems will be available for sale and service through Carestream in the United States and Canada. Thus, owing to the abovementioned factors, the mobile c-arms market is expected to project robust growth in the North American region over the forecast period.

## Mobile C-arms Industry Overview

The mobile C-arm market is a moderately fragmented market consisting of several major players. In terms of market share, multinational players have a larger share. To increase market penetration, market players are constantly involved in product development, collaborations, partnerships, and alliances. Some of the key market players in this market include Seimens Healthineers, GE Healthcare, Fujifilm Holding Corporation, Ziehm Imaging GmbH, and Koninklijke Philips NV.

### Additional Benefits:

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

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