

North America C-Arms - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The North America C-Arms Market size is estimated at USD 0.9 billion in 2024, and is expected to reach USD 1.13 billion by 2029, growing at a CAGR of 4.70% during the forecast period (2024-2029).

Key Highlights

-The healthcare system witnessed enormous challenges as a result of the COVID-19 pandemic. Several outpatient treatments were postponed or restricted during the COVID-19 pandemic to reduce the risk of viral transmission. Most chronic therapies were regarded as non-urgent. However, several imaging diagnostic technologies were widely available for COVID-19 diagnosis. The widespread use of diagnostic imaging technology during the COVID-19 pandemic significantly added to the market growth during the pandemic period.

-Moreover, an article published in the Indian Journal of Radiology Imaging in January 2021 indicated a limitation in non-urgent imaging during the COVID-19 pandemic, which caused the rescheduling of mammograms, and other such screenings for diversion of the facility for COVID-19 care. Such postponement during the pandemic increased demand for imaging services. Currently, the market is regaining its growth pace owing to the normalization of the situation coupled with an increasing burden of injuries and road accidents.

-The major factors driving the market growth in North America include the increasing geriatric population and the incidence of chronic diseases, and advancements in maneuverability and imaging capabilities. Moreover, the rising number of sports injury cases is expected to impact the North American c-arms market's growth significantly.

-For instance, according to the National Security Council (NSC) 2021 data on sports and recreational injuries, in the year 2021, over 3.2 million people were admitted to emergency departments in the United States for injuries involving sports and recreational equipment, including exercise, cycling, and basketball. Also, the number of exercise-related injuries increased in 2021, with over 409,224 injuries reported in the year 2021, compared to 377,939 injuries reported in 2020. The wide application

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of C-arms in emergency procedures for injury management is expected to significantly impact the growth of the North American c-arms market during the forecast period.

-Moreover, according to the National Association of Chronic Disease Directors (NACDD) commentary on chronic disease prevention published in April 2022, around 40% of the adults in the United States were affected by multiple chronic conditions, with more than half of the population affected by high blood pressure. Also, as per the Canadian Cancer Statistics released in November 2022, an estimated 233,900 Canadians will be diagnosed with cancer in 2022. Also, according to the estimates, over 1.5 million people in Canada were affected by cancer, with the majority of the cancer cases attributed to an older age. The region's large population affected by chronic diseases is expected to boost market growth over the forecast period.

-Several key market players have also introduced various c-arm equipment, likely to boost the growth of the North American c-arm market. For instance, in July 2022, Fujifilm launched its FDR Cross hybrid c-arm and portable x-ray system in the United States. The dual-function c-arm offers portable fluoroscopic and radiographic imaging on a single platform, reducing the need to bring additional imaging equipment for essential image-guided procedures.

-Moreover, in May 2021, the United States Food and Drug Administration (USFDA) approved the Cios Flow, a mobile C-arm designed for use by multiple disciplines in the operating room, including orthopedics, trauma surgery, spinal surgery, vascular surgery, and pain therapy. Such activities are expected to add to the growth of the C-arms market in North America over the forecast period.

-Thus, factors such as the growing burden of chronic diseases and approvals from regulatory bodies are major propelling factors contributing to the market's growth. However, the high procedural and equipment costs and the low replacement rates of c-arm systems will likely hinder the growth of the North American c-arms market during the forecast period.

North America C-arms Market Trends

C-Arm Application in Cardiology is Expected to Hold a Significant Market Share Over the Forecast Period

- C-arm computed tomography in cardiac imaging offers the potential for three-dimensional imaging of the cardiac anatomy within the interventional environment. This detailed view is necessary to support complex interventional strategies, such as transcatheter valve replacement, interventional therapy of atrial fibrillation, implantation of biventricular pacemakers, and assessment of myocardial perfusion.

- The large prevalence of cardiac disorders and the growing geriatric population in the region is expected to boost the market segment growth. For instance, the Heart and Stroke Foundation (HSF) of Canada in February 2022 indicated that over 750,000 people were living with a type of heart failure in Canada. Also, every year, over 100,000 people are diagnosed with heart failure condition in the country. The article also estimated that by 2030, the healthcare costs associated with heart failure in Canada are expected to reach USD 2.8 billion per year. The large prevalence of heart conditions in the nation is likely to boost the demand for c-arms, which is expected to propel the growth of the studied market segment over the forecast period.

- In addition, the recent product launches and collaborations in the region are expected to boost the market's growth. For instance, in April 2022, GE Healthcare and Medtronic PLC signed a collaboration focused on the unique needs and demand for care at Ambulatory Surgery Centers (ASCs) and Office Based Labs (OBLs). Fixed c-arm imaging systems have been used more and more frequently in ASCs and OBLs for cardiac and peripheral vascular procedures. Such activities are likely to propel the market growth during the forecast period.

- Thus, the cardiology segment in the North American c-arms market is expected to have significant growth over the forecast period owing to a high burden of cardiac diseases and strategic initiatives taken by the market players and others.

United States is Expected to Hold a Significant Share in the Market Over the Forecast Period

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- The United States is expected to hold a significant share of the North American c-arms market, owing to the large number of people affected by heart conditions and the rising investments in the healthcare sector. The huge prevalence of chronic diseases in the nation, along with the rising geriatric population, is expected to boost the growth of the studied market during the forecast period.
- For instance, as per the 2021 America's Health Rankings data, over 54 million people over the age of 65 are living in the United States, comprising 16.5% of the total population. It was projected that the nation's total number of adults aged 65 and older will rise to an estimated 85.7 million by the year 2050. The elderly population is more prone to chronic diseases owing to weakened immunity and other age-associated degenerative factors. Thus, the rising geriatric population is expected to boost the market growth in the nation over the forecast period.
- Also, the country's increasing prevalence of heart diseases is likely to add to the growth of the studied market over the forecast period. For instance, as per the CDC Data and Statistics on Congenital Heart Defects, updated in January 2022, congenital heart defect (CHD) was the most common type of congenital disability in the United States, which affects nearly 1%, or about 40,000 births per year. Some mild CHDs are increasing, while the prevalence of other types has remained stable. In addition to the same source, at least 15% of all CHDs are associated with genetic conditions.
- The wide application of C-arms in cardiovascular surgeries is likely to boost the growth of the studied market over the forecast period. The recent product launches in the United States are also expected to boost the growth of the studied market over the forecast period.
- For instance, in November 2021, Fujifilm Healthcare Americas launched the Persona CS mobile fluoroscopy system, its new, compact mobile c-arm imaging solution designed for rapid and seamless positioning in the operating room (OR) environments. The newly launched Persona CS has a powerful 5kW onboard generator that provides more than twice the power of typical compact c-arms, helping in improved image quality and x-ray scans for all patients. Such product launches are likely to add to the growth of the c-arms market in the country during the forecast period.
- Thus, the growing burden of diseases coupled with the launch of products in the country contributes to the significant growth in the United States in the studied market over the forecast period.

North America C-arms Industry Overview

The North America c-arms market is slightly consolidated and consists of a few major players. In terms of market share, a few of the major players are currently dominating the market. Some of the companies which are currently dominating the market are General Electric (GE Healthcare), Hologic Inc., Siemens Healthineers, Philips Healthcare, and Canon Medical Systems, among others.

Additional Benefits:

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

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