

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

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Report description:

The South American c-arms market size is estimated at USD 108.25 million in 2024 and is expected to reach USD 140.41 million by 2029, registering a CAGR of 5.34% during the forecast period.

Due to the COVID-19 pandemic, the number of surgical procedures decreased during the early pandemic in South American countries, which resulted in a decreased demand for C-arms. For instance, according to an article published by PubMed Central in January 2023, a study was conducted in Brazil, whiBrazil, which showed that there was a significant reduction in the total number of consultations (24.8%) and the number of attending patients (20.2%). The article also stated that there was a 13.0% reduction in the number of head and neck surgical procedures. Thus, owing to the COVID-19 pandemic, surgical procedures were significantly impacted during the initial pandemic phase. However, as the pandemic has subsided, surgical procedures have gone back to normal, so the studied market is expected to have stable growth during the forecast period of the study.

The major factors contributing to the growth of the South American c-arms market are the rising geriatric population, the increasing incidence of chronic diseases, and the increasing advancements in maneuverability and imaging capabilities.

The rising prevalence of chronic diseases in the country is the major factor driving the market growth, as c-arms are increasingly used for the surgical treatment procedures of these diseases. For instance, according to an article published by PubMed Central in August 2022, cervical cancer represents a major public health concern in Brazil, and it is estimated to be the third most common cancer in women. The article also stated that an estimated 16,710 new cases of cervical cancer are expected in Brazil in 2022, with a rate of 16.35 cases per 100,000 women. Thus, the high prevalence of cancer in the country is expected to boost the usage of C-arms.

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Furthermore, according to an article published by PubMed Central in October 2022, Argentina is

South America C-Arms Market Trends

The Mini C-Arm Segment is Expected to Show Significant Growth over 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 and have a smaller footprint, along with increased mobility compared to full-size C-arms. The market players are increasing efforts to develop adaptable platforms that fulfill the needs of healthcare providers for various surgical specialties. Factors such as the rising prevalence of chronic diseases and the rising geriatric population are expected to boost segment growth.

According to an article published by the European Heart Journal in March 2022, a study was conducted in Brazil, Argentina, Colombia, and Peru, which showed that the incidence of cardiovascular diseases (CVDs) per 1000 people was the highest incidence in Brazil (3.86) and the lowest in Argentina (3.07), and men had a higher incidence of CVDs when compared to women. The article also stated that for CVD, the largest population-attributable fractions were due to hypertension (18.7%), abdominal obesity (15.4%), tobacco use (13.5%), low strength (5.6%), and diabetes (5.3%). Thus, the high prevalence of cardiovascular diseases in the region, coupled with the rising geriatric population, is expected to boost segment growth.

According to an article published by PubMed Central in July 2022, Dupuytren's Disease (DD) is a chronic and progressive disease characterized by fibrotic changes in the palmar and digital fascia of the patient. Such changes can lead to small nodules on the hand, causing contractures that limit the extension of the fingers, and surgery is needed for the treatment. The article stated that this disease has a high prevalence in Latin American countries, including Brazil. Thus, the high prevalence of such diseases is also expected to boost the usage of mini C-arms.

Hence, the aforementioned factors, such as the rising prevalence of chronic diseases and the rising geriatric population, are expected to boost the growth of the studied segment during the forecast period of the study.

Brazil is Expected to Hold a Significant Market Share Over the Forecast Period

Brazil is expected to hold a significant market share in the South American C-arms market due to the rising burden of diseases such as cancer, diabetes, and cardiovascular diseases coupled with the rising geriatric population.

The rising prevalence of cancer in the country is a major factor in the rising adoption of C-arms in surgical procedures. For instance, according to an article published by the National Cancer Institute of Brazil in February 2023, an estimated 704 thousand new cases of cancer are expected in Brazil during the period of 2023-2025.

Moreover, the rising prevalence of cardiovascular diseases in the country is also expected to boost market growth in the country. For instance, according to an article published by PLOS One in December 2022, Brazil has a high burden of cardiovascular diseases. Brazilians are also said to be going through gradual changes in eating patterns, which is evidently perceived due to the excessive consumption of nutrients linked to the causes of non-communicable diseases (NCD), such as sodium, sugars, and fats. An increase in the consumption of ultra-processed foods (UPF) by the Brazilian population has been observed, which is often associated with cardiovascular diseases. Thus, the burden of cardiovascular diseases in the country, alongside the increased consumption of ultra-processed foods, is expected to boost the market growth.

Therefore, the aforementioned factors, such as the increasing prevalence of chronic diseases such as cancer, cardiovascular diseases, and diabetes and the growing geriatric population, are expected to boost the market growth.

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South America C-Arms Industry Overview

The South American C-arms market is competitive. Major players are consistently trying to gain a competitive advantage through product innovations and upgrades in existing product lines which contributes to boost the growth of the market. Some of the market players are GE Healthcare, Siemens Healthineers, Ziehm Imaging GmbH, Canon Medical Systems Corporation, Koninklijke Philips NV, OrthoScan Inc, Shimadzu Corporation, and Stephanix.

Additional Benefits:

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

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