

South America C-Arms - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 90 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

South America C-Arms Market Analysis

The South America C Arms market is valued at USD 352.75 billion in 2025 and is forecast to reach USD 460.07 billion by 2030, advancing at a 5.46% CAGR, underscoring steady momentum despite macro-economic volatility. Ongoing regulatory modernization in Brazil, import-payment reforms in Argentina, and the spread of outpatient surgical models have increased the speed at which imaging capital projects move from planning to purchase approval, directly stimulating equipment volumes. Manufacturers are promoting autonomous positioning, cone-beam CT functionality, and dose-saving features to address workforce and safety gaps, while OEM-bank financing schemes keep large ticket items within the reach of midsize hospitals. Private hospital groups expanding into tier-2 Brazilian cities are accelerating the replacement cycle of aging image intensifier units with flat-panel systems. Currency swings, tariff regimes, and uneven radiographer distribution remain short-term headwinds, yet the long-term demand curve is buoyed by a rising geriatric population and the growing share of minimally invasive surgeries across orthopedics, neurology, and pain management.

South America C-Arms Market Trends and Insights

Rising Geriatric Population & Chronic Disease Burden

Colombia is expected to perform 39,270 arthroplasties annually by 2050, a 52.7% jump that will require more intra-operative imaging cycles. Brazil recorded 202,940 traumatic amputations between 2008-2023, costing USD 54.87 million in yearly

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

reimbursements, reinforcing continual capital outlays for high-throughput systems. Chile's clavicle fracture surgery rate climbed from 2.8 to 19.1 per 100,000 people between 2005-2019, further validating orthopedics' heavy reliance on C-Arms. Urban hospitals facing aging cohorts are upgrading to flat-panel configurations that deliver superior low-dose performance, while outreach programs depend on compact mobile units that can be transported to peripheral sites.

Growing Adoption of Minimally-Invasive Surgeries

Minimally invasive spine procedures are expanding across South America, aided by regional training hubs in Bogota that improve surgeon proficiency. In Brazil, bone-anchored hearing implant operations cut complication rates by 49% and operating times by half when performed with image-guided tools. Robotic thoracic programs now operate on 41 da Vinci systems concentrated in Sao Paulo and Rio de Janeiro, confirming hospital demand for real-time fluoroscopy that syncs with robotics. As more surgeries migrate to outpatient environments, the South America C Arms market benefits from compact mobile platforms that dock easily within hybrid ORs, guaranteeing workflow continuity without permanent infrastructure changes.

High Procedural & Equipment Costs

Brazil imposes 20-60% tariffs on imported medical devices, escalating capital budgets for tertiary hospitals even after extended 60-day payment terms were introduced in 2024. Argentine peso devaluation deepens price uncertainty, compelling facilities to prioritize essential consumables over elective imaging upgrades. Flat-panel C-Arms list between USD 50,000 and USD 175,000, deterring smaller clinics that lack volume guarantees. Access inequities persist in Chile where privately insured patients enjoy 2.8-times greater orthopedic surgery rates than their public counterparts, highlighting the affordability divide.

Other drivers and restraints analyzed in the detailed report include:

Advancements in Maneuverability & Imaging Capabilities / Expansion of Private Specialty Surgical Centers in Tier-2 Brazilian Cities / Import-Duty Volatility & Currency Devaluation Risk /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Fixed systems held 67.91% of South America C Arms market share in 2024 on the back of high-throughput trauma centers that demand ceiling-mounted stability and large detector sizing. Mobile platforms are, however, forecast to outpace at a 5.82% CAGR because outpatient units prize maneuverability for multi-disciplinary theater rosters. The South America C Arms market size for mobile systems is projected to add nearly USD 40 billion between 2025-2030 as reimbursements for day-care surgeries improve. Siemens Healthineers' autonomous CIARTIC Move, launched in 2024, reduces position-setup time by half, underscoring why mobile innovation resonates in staff-constrained sites.

Implementation of cone-beam CT within mobile footprints is closing the capability gap with fixed fluoroscopy suites, allowing advanced trauma and spinal workflows in lower-acuity facilities. As refurbish-friendly regulations take hold in Brazil and Argentina, mini C-Arm uptake is accelerating among orthopedists who treat extremity injuries in ambulatory settings. Continuous cross-pollination of software features across fixed and mobile lines blurs category boundaries, yet installation cost and theater configuration remain the dividing line for capital budgeting.

Flat-panel detectors captured 63.02% share in 2024, and South America C Arms market size linked to flat-panel units is projected to grow at 5.65% CAGR through 2030 as public and private buyers retire image-intensifier stock. CMOS sensors, which deliver superior low-dose clarity and 3D reconstruction speed, are penetrating high-acuity accounts despite premium pricing. Image

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

intensifiers retain a core niche in cash-strapped hospitals, yet declining manufacturer support and spare-part scarcity push decision-makers toward entry-level a-Si panels that satisfy regulatory dose caps. IGZO glass substrates are emerging in Brazil's top private facilities where surgeons' preference dictates ultra-high pixel density for vascular interventions.

AI-driven real-time noise suppression embedded in flat-panel consoles compensates for dose reductions, widening the technology gap versus aging image intensifiers. Flexible upgrade paths, including drop-in panel retrofits, ensure even conservative budget holders can shift to panel-based architectures without rebuilding entire suites.

The South America C-Arms Market Report is Segmented by Device Type (Fixed C-Arms and Mobile C-Arms [Full-Size and Mini]), Detector Technology (Image Intensifier and Flat-Panel Detector), Application (Orthopedics & Trauma, Cardiology, and More), End-User (Hospitals and More), and Country (Brazil and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Canon Corporation / FUJIFILM / GE Healthcare / Hologic / Koninklijke Philips / Lepu Medical / Medtronic / Nanjing Perlove Medical / Orthoscan / Planmed / Shimadzu / Siemens Healthineers / Skanray Technologies Ltd / Stephanix SAS / United Imaging Healthcare / Ziehm Imaging /

Additional Benefits:

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

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions & Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 Market Drivers
 - 4.2.1 Rising Geriatric Population & Chronic Disease Burden
 - 4.2.2 Growing Adoption of Minimally-Invasive Surgeries
 - 4.2.3 Advancements in Maneuverability & Imaging Capabilities
 - 4.2.4 Expansion of Private Specialty Surgical Centers in Tier-2 Brazilian Cities
 - 4.2.5 Regulatory Fast-Track for Refurbished C-Arms Lowering Capex
 - 4.2.6 OEM-Bank Financing Programs Boosting Equipment Affordability
 - 4.3 Market Restraints
 - 4.3.1 High Procedural & Equipment Costs
 - 4.3.2 Import-Duty Volatility & Currency Devaluation Risk
 - 4.3.3 Shortage of Trained Radiographers Limits Utilization
 - 4.3.4 Low Replacement Rates of Installed Systems
 - 4.4 Regulatory Landscape

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.5 Technological Outlook
- 4.6 Porter's Five Forces Analysis
 - 4.6.1 Threat of New Entrants
 - 4.6.2 Bargaining Power of Buyers/Consumers
 - 4.6.3 Bargaining Power of Suppliers
 - 4.6.4 Threat of Substitute Products
 - 4.6.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value)

- 5.1 By Type
 - 5.1.1 Fixed C-Arms
 - 5.1.2 Mobile C-Arms
 - 5.1.2.1 Full-size
 - 5.1.2.2 Mini
- 5.2 By Detector Technology
 - 5.2.1 Image Intensifier
 - 5.2.2 Flat-Panel Detector
- 5.3 By Application
 - 5.3.1 Orthopedics & Trauma
 - 5.3.2 Cardiology
 - 5.3.3 Gastroenterology
 - 5.3.4 Neurology
 - 5.3.5 Oncology
 - 5.3.6 Pain Management & Vascular
- 5.4 By End-User
 - 5.4.1 Hospitals
 - 5.4.2 Ambulatory Surgical Centers
 - 5.4.3 Specialty & Orthopedic Clinics
- 5.5 By Geography
 - 5.5.1 Brazil
 - 5.5.2 Argentina
 - 5.5.3 Chile
 - 5.5.4 Colombia
 - 5.5.5 Peru
 - 5.5.6 Rest of South America

6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Competitive Benchmarking
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)
 - 6.4.1 Canon Corporation
 - 6.4.2 FUJIFILM Corporation
 - 6.4.3 GE Healthcare
 - 6.4.4 Hologic Inc.
 - 6.4.5 Koninklijke Philips N.V.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.6 Lepu Medical
- 6.4.7 Medtronic PLC
- 6.4.8 Nanjing Perlove Medical
- 6.4.9 OrthoScan Inc.
- 6.4.10 Planmed Oy
- 6.4.11 Shimadzu Corp.
- 6.4.12 Siemens Healthineers
- 6.4.13 Skanray Technologies Ltd
- 6.4.14 Stephanix SAS
- 6.4.15 United Imaging Healthcare
- 6.4.16 Ziehm Imaging GmbH

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

South America C-Arms - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 90 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

