

Global Fluoroscopy and C-arms Industry Analysis 2020, Market Growth, Trends, Opportunities Forecast To 2025

The market for interventional fluoroscopy is growing due to growing popularity of minimally invasive surgeries

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Description

Advancements in medical imaging over the last decade have transformed almost every aspect of medicine. Modern highly sophisticated imaging equipment can provide detailed images and precise information of almost every part and function of the body enabling better diagnosis and treatment. Fluoroscopy is an important imaging modality used for evaluation of dynamic biological processes and guiding interventions. Fluoroscopy equipment provides high-resolution X-ray images in real time.

Due to global trends such as aging and growing populations, the proliferation of lifestyle and chronic diseases and heightened emphasis on care quality and value, treatments and technologies innovation and infrastructure improvements, there has been an increase in diagnostic as well therapeutic and interventional procedures that rely on fluoroscopy. Mr. Gurpreet S Suri, Managing Director, Rege Imaging & Cine Films (P) Ltd. mentions, "The market for interventional fluoroscopy is growing due to growing popularity of minimally invasive surgeries." Fluoroscopic systems and C-arms are widely used for a range of diagnostic and surgical needs including vascular, orthopedics, gastrointestinal, endoscopic, urologic, neurologic, critical care, pain management and emergency procedures. C-arms are widely used as intraoperative imaging solutions for all surgical imaging needs particularly in minimally invasive diagnostic and surgical procedures such as needle placement and anatomic localization of implants.

As the healthcare sector is continuously under pressure to improve the quality, access and affordability of care, the demand for minimally invasive surgery is growing worldwide. Minimally invasive surgery offers several benefits including reduced procedure time, shorter recovery time, less trauma, lower risk of infection, lower radiation dose, lower cost to the healthcare provider, and more benefits. It allows procedures to move from inpatient to outpatient facilities resulting in substantial cost savings. The growing popularity of minimally invasive procedures is spurring

the demand for fluoroscopic systems, particularly the mobile C-arm. Given the maneuverability, cost-effectiveness and diversity, mobile C-arms are emerging as an attractive proposition. Advanced mobile C-arms with intraoperative three-dimensional (3D) imaging and navigation systems are rapidly emerging as a space-saving and cost-efficient alternative to a fixed installed unit. On a global basis, during the studied period, while the fixed fluoroscopy systems' segment led the global fluoroscopy market in terms of revenue, mobile C-arms segment led the market in terms of volume.

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In the modern healthcare environment, due to a growing number of old and obese patients and advancements in medical (diagnostic as well as therapeutic) tools and techniques, clinicians are more often performing complex surgeries and interventional procedures. Complex interventional procedures generally have high intraoperative imaging requirements; thus, clinicians are increasingly demanding advanced fluoroscopy systems with post-processing software and navigation aids that enable clinicians to improve patient outcomes with higher precision and reduced radiation dose. In addition, due to the increased pressure of growing volume of procedures utilizing fluoroscopic systems, systems with advanced functionality, and supporting high levels of patient throughput are in demand.

In the last decade, there have been several advancements in fluoroscopy equipment and C-arms such as the emergence of advanced post-processing software for reducing the amount of radiation exposure. However, exposure to X-ray radiation has been the major hindering factor in the growth of the global fluoroscopy market. Other hindering factors include budgetary constraints of healthcare facilities, global cutbacks in healthcare expenditures, and growing presence of other advanced cross-sectional imaging modalities such as CT and MRI imaging.

Report Scope:

This report focuses on the global market for fluoroscopy products and provides an updated review including its types and its applications in various clinical fields. Clinical fields considered in this report are vascular, orthopedics, gastrointestinal, endoscopic, urologic, neurologic, critical care, pain management, and emergency procedures. The fluoroscopy and mobile C-arms market is mainly driven by growing cases of age-related alignments, chronic conditions and non-communicable diseases, and the corresponding increase in the number of surgeries. The scope of the study is global. BCC analyzes each market and its application, regulatory environment, new products and advancements, market projections and market shares. It is important to note that this report only includes full-sized C-arm systems for the purpose of analysis. Mini C-arm systems have not been included in the analysis of this study.

Also included in the report are relevant patent analysis and comprehensive profiles of companies that lead the fluoroscopy industry. Few major players that dominate the market for

fluoroscopic devices are GE Healthcare (part of General Electric Co.), Philips Healthcare (part of Koninklijke Philips N.V.) and Siemens Healthcare GmbH (part of Siemens AG).

Other significant players in the global fluoroscopic device are Canon Inc., Carestream Health Inc. (part of the Onex Corp.), Gemss Medical Systems Co. Ltd., Genoray Co. Ltd., Hologic Inc., Omega Medical Imaging LLC, OrthoScan Inc., Shimadzu Corp., Toshiba Medical Systems Corp. (part of Canon Inc.), Villa Sistemi Medicali SPA, Ziehm Imaging Inc. etc. The report includes company details and product profiles along with a competitive analysis of market participants.

The regional distribution of the market includes North America (the U.S. and Canada), Europe (Germany, the United Kingdom, France, Spain, Italy, Scandinavia, and Benelux) and emerging markets. The report provides market estimates and projections in terms of unit shipments and revenues for the forecast period 2017-2022. The market data pertains to new product/unit sales and does not include replacement or refurbished systems.

Report Includes:

- 51 data tables
- An overview of the global fluoroscopy and C-arms market and related technologies
- Analyses of global market trends, with data from 2016 and 2017, and projections of compound annual growth rates (CAGRs) through 2022
- An outline of the present state of applications of fluoroscopy and C-arms
- Descriptions of trends in price and price-performance and other factors, including demand in the market
- [Profiles of key companies](#) in the market, including

Allengers Medical Systems Ltd.

Canon Inc.

Carestream Health Inc.

Dms Imaging

Ecotron Co. Ltd.

Ge Healthcare

Gemss Medical Systems Co. Ltd.

Genoray Co. Ltd.

Hitachi Ltd.

Hologic Inc.

Italray Srl

Omega Medical Imaging Llc

Orthoscan Inc.

Pausch Medical GmbH

Philips Healthcare

Recorders & Medicare Systems Pvt. Ltd.

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