

Fluoroscopy Equipment Market - A Global and Regional Analysis: Focus on Product, Application, End User, Regional, and Country - Analysis and Forecast, 2026-2036

<https://marketpublishers.com/r/F30CCA0749ECEN.html>

Date: June 2026

Pages: 136

Price: US\$ 4,900.00 (Single User License)

ID: F30CCA0749ECEN

Abstracts

The global fluoroscopy equipment market, initially valued at \$3,111.5 million in 2025, is projected to witness substantial growth, reaching \$5,932.7 million by 2036, marking a remarkable compound annual growth rate (CAGR) of 6.10% over the period from 2026 to 2036.

The global fluoroscopy equipment market is experiencing steady growth, driven by the increasing demand for real-time imaging during diagnostic, interventional, and surgical procedures. Fluoroscopy systems enable continuous X-ray visualization of internal anatomical structures, allowing clinicians to monitor the movement of organs, guide medical devices, and perform complex procedures with enhanced precision. These systems are widely utilized across cardiology, orthopedics, gastroenterology, urology, pain management, and vascular interventions, making them an essential component of modern healthcare facilities. The growing preference for minimally invasive procedures, coupled with rising incidences of cardiovascular, gastrointestinal, and musculoskeletal disorders, is contributing significantly to market expansion.

Technological advancements are transforming the capabilities of fluoroscopy equipment, improving image quality, workflow efficiency, and patient safety. The transition from conventional analog systems to digital fluoroscopy platforms has enabled higher-resolution imaging, enhanced image processing, lower radiation exposure, and improved data integration within healthcare environments. Innovations such as flat-panel detectors, automated dose management technologies, advanced visualization software, and hybrid fluoroscopy-radiography systems are further strengthening the

clinical value of these devices. Additionally, the increasing adoption of mobile and compact fluoroscopy units is expanding procedural flexibility in operating rooms and specialized treatment centers. While factors such as high capital investment requirements and radiation safety considerations may influence purchasing decisions, ongoing technological innovation and the growing need for image-guided procedures are expected to support the long-term growth of the global fluoroscopy equipment market.

Market Introduction

The global fluoroscopy equipment market is witnessing robust growth as healthcare providers increasingly rely on real-time imaging technologies to support diagnostic evaluations, image-guided interventions, and minimally invasive procedures. Fluoroscopy equipment enables continuous visualization of internal anatomical structures and physiological functions, making it an indispensable tool across cardiology, orthopedics, gastroenterology, urology, pain management, and vascular specialties. As the demand for precision-guided procedures continues to rise, healthcare facilities are investing in advanced fluoroscopy systems that offer enhanced image clarity, improved procedural guidance, and greater operational efficiency, helping clinicians achieve better patient outcomes while minimizing procedural risks.

Continuous innovation in fluoroscopy technology is reshaping the market by improving imaging performance, workflow optimization, and radiation safety. Advancements such as digital flat-panel detector technology, high-definition imaging, automated dose reduction systems, advanced image processing software, and integrated visualization tools are enabling more accurate and efficient clinical procedures. The growing adoption of hybrid fluoroscopy platforms that combine multiple imaging capabilities within a single system is further enhancing procedural versatility across healthcare settings. Additionally, the integration of artificial intelligence, automation, and connectivity solutions is supporting improved workflow management and clinical decision-making. While equipment costs, regulatory compliance requirements, and radiation management considerations may influence adoption rates in some regions, the increasing utilization of image-guided procedures and continued technological progress are expected to drive sustained growth in the global fluoroscopy equipment market.

Industrial Impact

The global fluoroscopy equipment market is generating a significant impact on the medical imaging industry by supporting the growing demand for real-time visualization

during diagnostic, therapeutic, and image-guided procedures. Leading manufacturers such as GE HealthCare, Siemens Healthineers, Koninklijke Philips N.V., Canon Medical Systems Corporation, FUJIFILM Holdings Corporation, Shimadzu Corporation, and Hologic, Inc. are continuously advancing fluoroscopy technologies to enhance image quality, procedural accuracy, and radiation management. These innovations are particularly important in clinical areas such as cardiology, orthopedics, gastroenterology, urology, and vascular interventions, where continuous imaging is essential for guiding devices, monitoring anatomical movement, and ensuring procedural precision. The transition toward digital fluoroscopy systems equipped with advanced image processing, flat-panel detectors, and dose optimization technologies is helping healthcare providers improve both clinical outcomes and operational efficiency.

From an industry perspective, the evolution of fluoroscopy equipment is driving a shift toward more integrated, workflow-oriented imaging environments that support a wide range of minimally invasive procedures. The increasing deployment of hybrid operating rooms, catheterization laboratories, and specialized interventional suites is encouraging healthcare facilities to invest in versatile fluoroscopy platforms capable of serving multiple clinical applications. Furthermore, the incorporation of artificial intelligence, automated imaging protocols, and advanced connectivity solutions is improving workflow management, reducing examination times, and enhancing decision-making capabilities. By enabling greater procedural precision, supporting minimally invasive treatment approaches, and improving healthcare resource utilization, fluoroscopy equipment is playing a vital role in modernizing diagnostic and interventional imaging infrastructure worldwide.

Market Segmentation:

Segmentation 1: By Product

Fluoroscopy System

C-Arm

C-Arm Segment to Dominate the Fluoroscopy Equipment Market (by Product)

In 2025, the C-arm product segment dominated the fluoroscopy equipment market due to its extensive use in a wide range of diagnostic and interventional procedures. C-arm fluoroscopy units provide real-time, high-resolution imaging that enables clinicians to

visualize internal anatomy and guide instruments during minimally invasive procedures. Their versatility across multiple specialties such as orthopedics, cardiology, gastroenterology, urology, and pain management has made them a preferred imaging solution in both operating rooms and interventional suites. The ability of C-arm systems to deliver dynamic imaging while maintaining procedural flexibility supports their strong adoption across hospitals, ambulatory surgical centers, and specialty clinics.

The dominance of C-arm has been further reinforced by continuous technological advancements that have significantly improved their performance and usability. Modern C-arm devices offer features such as flat-panel detectors, 3D imaging capabilities, low-dose radiation technology, and enhanced mobility, enabling greater precision and patient safety during procedures. The growing adoption of mobile and compact C-arm systems has also expanded their use in decentralized and outpatient settings, where space efficiency and operational flexibility are critical. Additionally, their compatibility with hybrid operating rooms and integration with advanced imaging software and navigation systems further strengthens their clinical value, positioning C-arm systems as the leading segment in the global fluoroscopy equipment market

Segmentation 2: By Application

Diagnostic Application

Surgical Application

Surgical Application Segment to Dominate the Fluoroscopy Equipment Market (by Application)

In terms of application, the surgical segment dominated the fluoroscopy equipment market in 2025 due to the increasing utilization of real-time imaging guidance across a wide range of operative procedures. Fluoroscopy plays a critical role in surgical environments by providing continuous visualization of internal structures, enabling surgeons to accurately position instruments, implants, and devices during minimally invasive and complex surgeries. Its widespread use in orthopedic surgeries, cardiovascular interventions, spinal procedures, and gastrointestinal surgeries has made it an indispensable imaging modality in modern operating rooms. The growing shift toward minimally invasive surgical techniques, which offer reduced post-operative complications, shorter hospital stays, and faster patient recovery, continues to significantly drive demand for fluoroscopy systems in surgical applications.

The dominance of the surgical segment has been further supported by the rapid expansion of advanced operating rooms, including hybrid operating suites that integrate imaging systems directly into the surgical environment. These setups enable seamless intraoperative imaging, improving procedural precision and reducing the need for patient transfer between departments. Additionally, advancements in fluoroscopy technology, such as real-time digital imaging, dose reduction techniques, and enhanced visualization tools, are improving surgical workflow efficiency and patient safety. The increasing adoption of image-guided surgical procedures across multiple specialties, along with rising investments in hospital infrastructure and operating room modernization, is expected to sustain the strong dominance of the surgical application segment in the global fluoroscopy equipment market.

Segmentation 3: By End User

Hospitals and Ambulatory Surgical Centers

Diagnostic Imaging Centers

Other End User

Hospitals and Ambulatory Surgical Centers Segment to Dominate the Fluoroscopy Equipment Market (by End User)

In 2025, hospitals and ASC dominated the fluoroscopy equipment market due to their high patient inflow, broad range of clinical specialties, and strong infrastructure for advanced diagnostic and interventional procedures. Hospitals serve as primary centers for complex surgeries, emergency care, and image-guided interventions, all of which require continuous use of fluoroscopy systems for real-time visualization and procedural guidance. Their ability to support high capital investments in advanced imaging equipment, along with the availability of skilled clinical professionals and multidisciplinary care teams, further strengthens the adoption of fluoroscopy technologies across hospital settings.

The dominance of hospitals has been further reinforced by their integration of fluoroscopy systems within catheterization laboratories, operating rooms, and diagnostic imaging departments, enabling seamless workflow across multiple departments. Alongside hospitals, ambulatory surgical centers (ASCs) are also witnessing rapid

adoption due to the growing shift toward outpatient and minimally invasive procedures. ASCs benefit from compact, cost-efficient, and mobile fluoroscopy systems that support same-day surgical procedures with faster turnaround times and lower operational costs compared to traditional hospital settings. The increasing volume of outpatient surgeries, coupled with healthcare systems' focus on cost containment and efficiency, is expected to sustain strong demand for fluoroscopy equipment across both hospitals and ASCs globally.

Segmentation 4: By Region

North America

U.S.

Canada

Europe

U.K.

Germany

France

Italy

Spain

Rest-of-Europe

Asia-Pacific

China

Japan

India

Australia

South Korea

Rest-of-Asia-Pacific

Rest-of-the-World

North America to Dominate the Fluoroscopy Equipment Systems Market (by Region)

North America dominates the fluoroscopy equipment market due to its advanced healthcare infrastructure, high adoption of cutting-edge medical imaging technologies, and strong presence of leading market players. The region has a well-established network of hospitals, ambulatory surgical centers, and specialty clinics that extensively utilize fluoroscopy systems for diagnostic imaging and image-guided interventional procedures. High procedural volumes across cardiology, orthopedics, gastroenterology, and oncology, combined with increasing demand for minimally invasive surgeries, continue to drive strong utilization of fluoroscopy equipment across the U.S. and Canada.

The dominance of North America has been further supported by continuous technological innovation and early adoption of advanced imaging systems, including digital fluoroscopy, flat-panel detector technology, and low-dose radiation solutions. Strong healthcare spending capacity, favorable reimbursement frameworks, and ongoing investments in hospital modernization and hybrid operating rooms also contribute significantly to market growth in the region. Additionally, the presence of key manufacturers and ongoing collaborations between healthcare providers and technology companies accelerate product development and deployment. The increasing focus on patient safety, procedural efficiency, and value-based care is expected to further reinforce North America's leading position in the global fluoroscopy equipment market.

Recent Developments in the Fluoroscopy Equipment Market

In March 2025, Canon Medical Systems announced the U.S. launch of the Adora DRFi following receipt of FDA 510(k) clearance in December 2024. The Adora DRFi, an advanced hybrid imaging platform, is now commercially available across the U.S. market, offering a unified solution that combines both radiographic and fluoroscopic imaging capabilities within a single system.

In December 2024, Siemens Healthineers introduced a new versatile imaging platform designed to integrate fluoroscopy and radiography capabilities within a single system, enabling healthcare providers to perform a broad range of diagnostic and interventional procedures while improving workflow efficiency and imaging flexibility.

In September 2024, Philips received FDA 510(k) clearance for the Zenition 30 mobile C-arm. The system is positioned as a lower-cost mobile fluoroscopy platform for image-guided surgical procedures, with flat detector technology, advanced imaging algorithms, dose-efficient imaging, DSA capability, and surgeon-controlled C-arm movement.

In April 2024, Philips launched Zenition 90 Motorized, a high-powered mobile C-arm system for complex vascular needs, cardiac interventions, pain management, and urology.

Demand – Drivers, Challenges, and Opportunities

Market Drivers

Rise in Minimally Invasive Procedures: The increasing adoption of minimally invasive procedures is one of the primary growth drivers for the fluoroscopy equipment market, as these procedures rely heavily on real-time image guidance rather than direct surgical visualization. Fluoroscopy systems enable physicians to continuously visualize catheters, guidewires, stents, implants, needles, screws, and contrast agents during procedures, improving procedural precision, safety, and clinical outcomes. As minimally invasive approaches continue to replace traditional open surgeries across multiple specialties, demand for advanced fluoroscopy systems is rising significantly in hospitals, ambulatory surgical centers, and interventional care settings.

The growing prevalence of cardiovascular diseases has been a major factor supporting market expansion. According to the data published by the World Health Organization in July 2025, Cardiovascular diseases caused approximately 19.8 million deaths globally in 2022, creating substantial demand for fluoroscopy-guided procedures such as cardiac catheterization, angiography, angioplasty, electrophysiology, and stent placement. Moreover, as per the study titled “Cardiac Catheterization Risks and Complications” published by NCBI in June 2023, in the U.S alone, more than 1 million

cardiac catheterization procedures are performed annually, supporting continued investments in fixed C-arm angiography systems and cath lab infrastructure. Similarly, increasing volumes of orthopedic, spine, trauma, and neurovascular procedures are accelerating the adoption of mobile C-arms for intraoperative imaging and surgical navigation.

Furthermore, technological advancements are also contributing to market growth, with healthcare providers increasingly adopting fluoroscopy platforms equipped with flat-panel detectors, low-dose imaging, pulsed fluoroscopy, 3D visualization, navigation integration, and workflow automation technologies. Major industry participants such as GE HealthCare, Philips, Siemens Healthineers, and Ziehm Imaging are actively expanding their mobile and fixed fluoroscopy portfolios to address growing demand for advanced image-guided surgical and interventional procedures. Overall, the continued global transition toward minimally invasive procedures is expected to sustain long-term demand for fluoroscopy equipment across both mobile and fixed imaging segments.

Market Challenges

Radiation Exposure Risk: Radiation exposure risk represents a significant restraint in the global fluoroscopy equipment market, as fluoroscopy relies on ionizing radiation to generate continuous or pulsed real-time imaging. Unlike static radiography, fluoroscopy often involves prolonged exposure during diagnostic or interventional procedures, increasing the cumulative radiation dose for both patients and healthcare staff. The U.S. Food and Drug Administration highlights that fluoroscopy can result in relatively high radiation doses, particularly in complex procedures such as stent placement, device implantation, and prolonged interventional imaging.

According to the data published by the CDC in February 2024, fluoroscopy procedures expose patients to ionizing radiation, which can slightly increase the risk of developing cancer later in life. This concern is particularly relevant for pediatric patients, younger patients, repeat-procedure patients, and complex interventional cases. As a result, clinicians may choose CT, MRI, ultrasound, endoscopy, or non-radiation-guided approaches when those alternatives can provide sufficient diagnostic or procedural information. Also, patient radiation dose varies widely depending on procedure type, patient size, fluoroscopy time, dose rate, operator technique, and system technology. Long fluoroscopy procedures can increase the risk of deterministic effects, such as skin injury, while cumulative exposure may increase stochastic risk, such as cancer.

Moreover, radiation exposure is also a key occupational restraint in the fluoroscopy

equipment market, particularly for interventional cardiologists, radiologists, surgeons, nurses, and technologists who are routinely exposed to scattered radiation during image-guided procedures. According to the IAEA, with appropriate radiation protection practices, staff exposure can typically be maintained within 0–5 mSv per year in high-volume facilities, compared to a regulatory occupational limit of 20 mSv per year. However, maintaining these safety levels requires strict adherence to protection protocols and the use of specialized safety infrastructure.

Market Opportunities

Growth in Hybrid Operating Rooms: endovascular procedures, growing demand for real-time intraoperative imaging, and the need for integrated surgical environments capable of supporting complex image-guided interventions. Hybrid ORs combine advanced imaging technologies such as fixed C-arms, robotic angiography systems, cone-beam CT, and 3D image-guided therapy platforms with conventional surgical infrastructure, enabling diagnosis, imaging, and surgical intervention to be performed within a single sterile environment without moving the patient. This improves procedural efficiency, clinical workflow, and patient management in high-acuity cases.

The expansion of hybrid OR infrastructure is being accelerated by increasing adoption of cardiovascular interventions, structural heart procedures, endovascular aneurysm repair (EVAR), neurovascular procedures, spine surgeries, and advanced orthopedic interventions that require continuous fluoroscopic guidance and precise device navigation. Hospitals are increasingly investing in premium fluoroscopy systems equipped with robotic positioning, low-dose imaging, 3D rotational imaging, advanced visualization software, and workflow integration technologies to support these procedures. For instance, in May 2026, Southland Hospital upgraded its diagnostic imaging capabilities with the installation of a new fluoroscopy system aimed at improving real-time imaging services and reducing radiation exposure to patients. Announced by the New Zealand Government on 19 May 2026, the \$586,897.36 (NZD 994,000) investment is intended to enhance local diagnostic capacity and enable patients in the Southland region to access more advanced imaging and interventional services closer to home.

How can this report add value to an organization?

Product/Innovation Strategy: The global fluoroscopy equipment market is segmented across system types such as fixed and mobile C-arm systems, surgical fluoroscopy units, and digital fluoroscopy platforms, along with application-based categories

including surgical, diagnostic, and interventional procedures. Understanding the dominance of surgical and C-arm segments, alongside the growing demand for portable and hybrid imaging solutions, provides critical insights for manufacturers aiming to develop next-generation fluoroscopy systems. Innovation is increasingly focused on improving real-time imaging quality, reducing radiation exposure, and integrating advanced visualization and workflow support tools, enabling vendors to align product development with evolving clinical requirements.

Growth/Marketing Strategy: Strategic collaborations, hospital partnerships, and geographic expansion are key drivers shaping growth in the fluoroscopy equipment market. Companies are increasingly targeting high-volume healthcare facilities, ambulatory surgical centers, and emerging regional markets where demand for cost-effective and versatile imaging systems is rising. The adoption of mobile C-arm systems, hybrid operating room solutions, and system upgrade pathways for installed bases is further supporting market penetration. Manufacturers are also focusing on expanding service offerings, including maintenance, software upgrades, and training programs, to strengthen long-term customer relationships and increase product lifecycle value.

Competitive Strategy: The fluoroscopy equipment market is highly competitive, with leading OEMs focusing on technological differentiation through enhanced imaging performance, dose optimization, and workflow efficiency. Competition is driven by advancements in digital fluoroscopy, flat-panel detector technology, and integrated imaging software that support improved clinical accuracy and procedural speed. Vendors are increasingly emphasizing system usability, automation, and interoperability with hospital information systems to improve adoption across diverse clinical environments. The ability to deliver reliable, low-dose, high-precision imaging solutions that enhance procedural outcomes remains a key differentiator in the global fluoroscopy equipment market.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

Years from 2024 to 2036 have been considered for the global market size estimation; 2025 has been considered as the base year, and 2026 to 2035 as the forecast period.

The scope of the report is based on comprehensive inputs from industry experts

across various sectors, including specialty clinics and hospitals, diagnostic laboratories, imaging centers, reference laboratories, and research institutions.

The market contribution of fluoroscopy equipment is anticipated to grow substantially in the future, with projections based on historical analysis of available solutions.

Revenues from companies have been sourced from their annual reports for FY2024 and FY2025. For private companies, revenue estimates are derived from primary research inputs, funding history, market collaborations, and operational performance.

The market has been mapped based on the existing fluoroscopy equipment. Key companies with significant offerings in this field have been identified and profiled in this report.

Primary Research

The primary sources involve industry experts and key stakeholders across the healthcare and radiography ecosystem, including fluoroscopy equipment manufacturers (OEMs), medical device companies, radiology service providers, and healthcare institutions. Stakeholders such as hospitals, imaging centers, and screening programs have been consulted to validate adoption trends, system-level integration, and clinical utility specific to fluoroscopy equipment. Respondents, including CEOs, vice presidents, product and marketing directors, and technology and innovation leaders, have been interviewed to obtain and verify both qualitative and quantitative insights for this research study.

The key data points taken from the primary sources include:

- validation and triangulation of all the numbers and graphs

- validation of report segmentations and key qualitative findings

- understanding the competitive landscape and business model

- current and proposed production values of a product by market players

validation of the numbers of different segments of the market in focus

percentage split of individual markets for regional analysis

Secondary Research

Open Sources

Certified publications, articles from recognized authors, white papers, directories, and major databases, among others

Annual reports, SEC filings, and investors' presentations of the leading market players

Company websites and a detailed study of their product portfolio

Gold standard magazines, journals, white papers, press releases, and news articles

Paid databases

The key data points taken from the secondary sources include:

segmentations and percentage shares

data for market value

key industry trends of the top players in the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies profiled have been selected based on inputs gathered from an analysis of company coverage, product portfolio, and market penetration.

Some prominent names established in this market are:

Canon Inc.

FUJIFILM Corporation

GE Healthcare

Koninklijke Philips N.V.

Hologic Inc

Italray

Genoray Co., Ltd.

Stephanix

Turner Imaging

Ziehm Imaging GmbH

Shimadzu Corporation

Siemens Healthineers

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