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# Mobile C-Arm Market - A Global and Regional Analysis: Focus on Product, Application, End User, Regional, and Country Analysis - Analysis and Forecast, 2026-2036

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## Abstracts

The global mobile C-arm market, initially valued at $2,099.1 million in 2025, is projected to witness substantial growth, surging to $3,716.6 million by 2036, marking a remarkable compound annual growth rate (CAGR) of 5.35% over the period from 2026 to 2036.

The mobile C-arm market comprises portable systems used in operating rooms and procedural settings to provide real-time X-ray imaging during surgeries and other interventions. These systems are highly valued for bringing imaging directly to the point of care, enabling quicker setup and greater workflow flexibility across orthopedics, trauma, pain management, urology, vascular, and other image-guided applications.

Market growth is being driven by rising procedure volumes, increasing adoption of minimally invasive and image-guided surgery, an aging patient population, and growing demand for flexible imaging solutions across hospitals and ambulatory care settings. Mobile C-arms serve as a portable intraoperative guidance tool, bringing real-time imaging directly to the surgeon, improving workflow efficiency, procedural precision, and clinical decision-making. Growth in the mobile C-arm market is being supported by several structural trends that are expanding the need for intraoperative imaging across healthcare settings. One of the most important drivers is the steady rise in surgical and interventional procedure volumes, particularly in specialties such as orthopedics, trauma, pain management, vascular surgery, and urology, where real-time visualization is critical for precision and safety. As hospitals and surgical centers handle more cases, the need for flexible imaging systems that can move easily between operating rooms

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and procedure suites becomes more important.

## Market Introduction

The global mobile C-arm market has undergone a significant transformation, driven by ongoing technological advancements and the growing integration of advanced imaging capabilities into surgical and interventional workflows. Manufacturers are increasingly developing compact, high-performance, and user-friendly mobile C-arm systems to improve imaging precision, enhance workflow efficiency, and reduce procedure time in operating rooms and procedure suites. These innovations support a broad range of applications, including orthopedics, trauma, cardiovascular procedures, pain management, urology, and other minimally invasive interventions, enabling faster, more accurate, and image-guided clinical decision-making.

Key advancements such as flat-panel detector technology, improved image quality, dose optimization features, enhanced maneuverability, and 3D imaging capabilities reflect the industry's focus on improving procedural accuracy, reducing radiation exposure, and increasing workflow flexibility. In addition, the integration of mobile C-arms with digital imaging software, image storage systems, and navigation-assisted surgical platforms is strengthening intraoperative efficiency, data accessibility, and procedural confidence across healthcare settings.

The rising volume of surgical procedures, increasing adoption of minimally invasive techniques, and growing demand for real-time imaging in both hospitals and ambulatory care centers are further accelerating market growth across developed and emerging regions. As healthcare providers continue to prioritize efficiency, precision, and better patient outcomes, ongoing innovation in mobile C-arm systems is expected to play a critical role in shaping the future of surgical imaging and image-guided intervention.

## Industrial Impact

The mobile C-arm market is creating a meaningful industrial impact by accelerating innovation across surgical imaging equipment, component supply chains, and service models. As healthcare providers increasingly adopt image-guided and minimally invasive procedures, demand is shifting toward systems that offer better image quality, lower radiation dose, improved maneuverability, and stronger software integration. This is encouraging manufacturers to invest in flat-panel detector technology, 3D imaging, workflow-focused software, and compact system designs while also driving demand for related components such as detectors, X-ray tubes, and image-processing systems.

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Leading companies, including GE HealthCare, Siemens Healthineers, Philips, Ziehm Imaging, Fujifilm, Shimadzu, Turner Imaging Systems, and Hologic, are shaping the competitive landscape through continuous product development and portfolio expansion. As a result, the market is not only advancing surgical imaging capabilities but also strengthening the broader medical imaging ecosystem through innovation, specialization, and expanding procedural use.

**Market Segmentation:**

Segmentation 1: By Product Type

- Full-Size C-Arm
- Mini C-Arm
- Others

Full-Size C-Arm Segment to Dominate the Mobile C-Arm Market (by Product Type)

In terms of product type, the full-size C-arm segment is expected to lead the mobile C-arm market, driven by rising orthopedic procedure volumes, increasing outpatient arthroplasty adoption, and continued demand for flexible real-time imaging systems across hospital operating rooms and ambulatory surgical centers.

Segmentation 2: By Application

- Orthopedics and Trauma
- Cardiovascular
- Pain Management
- Urology
- Gastroenterology
- Neurology

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Other Application

Orthopedics and Trauma to Dominate the Mobile C-Arm Market (by Application)

In terms of application, orthopedics and trauma are expected to lead the mobile C-arm market. This segment growth is driven by high and rising orthopedic procedure volumes.

Segmentation 3: By End User

Hospitals

Specialty Clinics

Ambulatory Surgical Centers

Hospitals to Dominate the Mobile C-Arm Market (by End User)

In terms of end users, hospitals are expected to lead the global mobile C-arm market, driven by the growing demand for real-time intraoperative imaging, the increasing complexity of procedures, and the flexibility these systems offer by moving easily between operating rooms and supporting multiple specialties without the need for a dedicated fixed imaging suite.

Segmentation 4: By Region

North America

U.S.

Canada

Europe

U.K.

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- Germany
- France
- Italy
- Spain
- Rest-of-Europe

Asia-Pacific

- China
- Japan
- Australia
- India
- South Korea
- Rest-of-Asia-Pacific

Latin America

- Brazil
- Mexico
- Rest-of-Latin America

Middle East and Africa

- K.S.A.
- U.A.E.
- Rest-of-Middle East and Africa

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North America to Dominate the Mobile C-Arm Market (by Region)

North America is projected to remain the leading region in the global mobile C-arm market, supported by the strong presence of major manufacturers in the U.S., well-established healthcare infrastructure, a high volume of image-guided procedures, and growing adoption of outpatient care delivery models. Within the region, the U.S. represents the largest market, driven by continued expansion of ambulatory surgery centers, increasing orthopedic procedure volumes, and the rising burden of chronic pain and cardiovascular conditions, all of which are sustaining demand for mobile C-arm systems.

Recent Developments in the Mobile C-Arm Market

> In Nov 2025, Shimadzu Medical Systems USA announced the U.S. launch of the SC15 mobile C-arm, a new fluoroscopy system designed to deliver high-quality intraoperative imaging with state-of-the-art flat panel detector technology, a 43-inch monitor, and a 15kW generator for orthopedic, pain management, general surgery, and vascular procedures.
>
> In Nov 2024, GE HealthCare announced advanced imaging innovations for its OEC 3D mobile CBCT C-arm designed to enhance procedural precision in interventional pulmonology.
>
> In Jun 2024, Koninklijke Philips N.V. received U.S. FDA approval for Zenition 90 Motorized.

**Demand – Drivers, Challenges, and Opportunities**

**Market Drivers:**

Growing Prominence of Minimally Invasive Surgeries: The growing prominence of minimally invasive surgeries (MIS) is a major demand driver for the mobile C-arm market because these procedures rely heavily on real-time intraoperative imaging to guide precision treatment through smaller incisions. Compared with open surgery, minimally invasive surgery is associated with less pain, shorter hospital stays, and fewer complications, which makes it increasingly attractive to hospitals, surgeons, payers, and

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patients. As a result, providers are expanding MIS adoption across orthopedic, spine, vascular, pain management, and other interventional specialties.

Market Restraints:

High Capital and Lifecycle Costs: High capital and lifecycle costs remain one of the most significant restraints in the mobile C-arm market, not simply because the systems are expensive to purchase, but because they represent a long-term financial and operational commitment. For most healthcare providers, the decision to invest in a mobile C-arm extends far beyond the initial capital expenditure. It involves evaluating the total cost of ownership over a typical lifecycle of 8–12 years, during which cumulative expenses can substantially exceed the original purchase price.

**Market Opportunities:**

Development of Imaging Systems with Advanced Storage and Archiving Capabilities: Development of imaging systems with advanced storage and archiving capabilities represents a significant opportunity for the mobile C-arm market, as healthcare providers are facing rising imaging volumes and growing pressure to manage image data more efficiently across operating rooms, ambulatory centers, and hospital networks. The American College of Radiology said imaging use increased by 13% per Medicare patient over the 2005–2021 period, while a 2025 study of 46.4 million imaging examinations across 167 U.S. radiology practices found exam volume grew 31% from Q1 2018 to Q1 2024. As imaging workloads expand, providers increasingly value systems that can seamlessly store, archive, search, and retrieve images without adding major on-premises infrastructure complexity.

**How can this report add value to an organization?**

Product/Innovation Strategy: The global mobile C-arm market has been divided into several key segments, including product type, application, end users, and regional markets. By understanding which segments hold the largest share and which ones show growth potential, this report offers invaluable insights for organizations looking to innovate and expand their product offerings.

Growth/Marketing Strategy: Strategic partnerships, product launches, and business expansions are anticipated to be central to the growth of the mobile C-arm market. Key developments and partnerships among diagnostic companies, healthcare providers, and research institutions have already begun to form a significant part of the market

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dynamics.

Competitive Strategy: The mobile C-arm market is highly competitive, with numerous well-established players offering mobile C-arm. Companies are increasingly differentiating themselves through integrated offerings that combine hardware, software, and analytics to ease radiologists' workload and enhance diagnostic consistency. Competitive positioning is now shaped by factors such as clinical performance, usability, interoperability with hospital IT systems, and the ability to operate efficiently in high-volume screening settings.

**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 2036 as the forecast period.

The scope of the report is based on comprehensive inputs from industry experts across various sectors, including hospitals, diagnostic laboratories, imaging centers, and research institutions.

The market contribution of mobile C-arm 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 mobile C-arm. 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 ecosystem, including mobile C-arm providers, manufacturers, radiology

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service providers, and healthcare institutions. Stakeholders such as hospitals, imaging centers, screening programs, and teleradiology providers have been consulted to validate adoption trends, workflow integration, and clinical utility specific to the mobile C-arm. 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

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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:

ARI Medical Technology Co., Ltd.

Eurocolumbus s.r.l.

FUJIFILM Corporation

GE Healthcare

GEMSS HEALTHCARE Co., Ltd.

Genoray Co., Ltd.

Hologic, Inc.

Koninklijke Philips N.V

Shanghai United Imaging Healthcare Co., Ltd.

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Siemens Healthineers

Shimadzu Corporation

SternMed GmbH

Turner Imaging

Villa Sistemi Medicali S.p.A.

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