

Hybrid Operating Room Market Report by Component (Intraoperative Diagnostic Imaging Systems, Operating Room Fixtures, Surgical Instruments, Audiovisual Display Systems and Tools, and Others), Application (Cardiovascular Applications, Neurosurgical Applications, Thoracic Applications, Orthopedic Applications, and Others), End User (Hospital and Surgical Centers, Ambulatory Surgical Centers), and Region 2024-2032

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Abstracts

The global hybrid operating room market size reached US\$ 1,194.6 Million in 2023. Looking forward, IMARC Group expects the market to reach US\$ 2,750.9 Million by 2032, exhibiting a growth rate (CAGR) of 9.42% during 2024-2032. The growing occurrence of various chronic ailments, rising popularity of minimally invasive surgical procedures, and increasing technological advancements in imaging modalities, such as 3D visualization, robotic-assisted surgery, and augmented reality (AR), are some of the major factors propelling the market.

A hybrid operating room (OR) is an advanced medical facility that combines the capabilities of a traditional surgical suite with state-of-the-art imaging technology, such as fluoroscopy, computed tomography (CT), and magnetic resonance imaging (MRI). It provides a versatile platform for performing complex surgical procedures that require real-time imaging guidance and intervention. It also offers a sterile surgical environment while integrating advanced imaging modalities within the same space, enabling surgeons to perform precise and minimally invasive interventions. It eliminates the need for patient transfers to different areas of the hospital, streamlining the workflow and

minimizing the risk of complications associated with transportation.

At present, the increasing demand for hybrid ORs due to the rising focus on improved patient outcomes is impelling the growth of the market. Besides this, the increasing occurrence of cardiovascular diseases and the subsequent need for complex surgeries, such as cardiac catheterizations, angioplasties, and heart valve replacements is contributing to the market growth. In addition, the growing technological advancements in imaging modalities, such as 3D visualization, robotic-assisted surgery, and augmented reality (AR), are offering a favorable market outlook. Apart from this, the increasing focus on value-based healthcare and cost containment is supporting the growth of the market. Additionally, the rising utilization of hybrid ORs, as they facilitate multidisciplinary collaboration among surgeons, radiologists, and other specialists, leading to improved efficiency and accurate diagnosis, is strengthening the growth of the market.

Hybrid Operating Room Market Trends/Drivers:

Rising demand for minimally invasive surgical methods

At present, there is a significant shift in surgical techniques towards minimally invasive procedures, driven by advancements in technology and patient preferences. This shift is creating a profound impact on various medical fields, including ophthalmology, cardiology, neurology, and orthopedics. Minimally invasive surgical techniques rely heavily on high-quality imaging to navigate intricate anatomical structures with precision. Hybrid ORs offer advanced imaging technologies, such as fluoroscopy, 3D imaging, and intraoperative magnetic resonance imaging (MRI) or computed tomography (CT) scans. These imaging modalities provide real-time visual feedback, allowing surgeons to visualize and assess the progress of the procedure accurately. Improved visualization enables surgeons to make precise incisions and perform complex interventions with greater confidence, ultimately leading to better patient outcomes.

Increasing focus on improving treatment and diagnostic procedures

The increasing focus on improving treatment and diagnostic procedures is positively influencing the hybrid operating room market. A hybrid operating room (OR) combines advanced imaging technology, including computed tomography (CT), magnetic resonance imaging (MRI), and angiography, with a fully equipped surgical suite. This integration allows for real-time imaging and surgical intervention in a single location,

enabling a more efficient and precise approach to patient care. Hybrid ORs promote collaboration among different medical specialties, including surgeons, interventional radiologists, cardiologists, and anesthesiologists. The combination of imaging technologies and surgical capabilities within a single space facilitates real-time communication and coordination between specialists. This collaborative approach allows for comprehensive and individualized patient care. Hybrid ORs also offer a controlled environment that combines the safety and sterility of a traditional OR with the real-time imaging capabilities of an interventional radiology suite.

Growing occurrence of various chronic ailments

The rising occurrence of chronic conditions, including cardiovascular diseases, cancer, and neurological disorders, is creating a need for advanced surgical interventions that can be performed in a hybrid OR setting. Chronic ailments often require a precise and accurate diagnosis to determine the appropriate treatment approach. Hybrid ORs combine the imaging capabilities of a traditional radiology suite with the sterile environment of an operating room, enabling real-time imaging during surgical procedures. Besides this, various chronic ailments can be effectively treated through minimally invasive procedures, which offer several benefits over traditional open surgeries, such as reduced trauma, shorter hospital stays, faster recovery times, and lower complication rates. Hybrid ORs provide an ideal setting for performing minimally invasive surgeries by combining surgical and imaging equipment in one space.

Hybrid Operating Room Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global hybrid operating room market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on component, application and end user.

Breakup by Component:

Intraoperative Diagnostic Imaging Systems

Angiography Systems

MRI Systems

CT Systems

Others

Operating Room Fixtures

Operating Tables

Operating Room Lights

Surgical Booms

Radiation Shields

Surgical Instruments

Audiovisual Display Systems and Tools

Others

Intraoperative diagnostic imaging systems dominate the market

The report has provided a detailed breakup and analysis of the market based on the component. This includes intraoperative diagnostic imaging systems (angiography systems, MRI systems, CT systems, and others), operating room fixtures (operating tables, operating room lights, surgical booms, and radiation shields), surgical instruments, audiovisual display systems and tools, and others. According to the report, intraoperative diagnostic imaging systems (angiography systems, MRI systems, CT systems, and others) represented the largest segment.

Intraoperative diagnostic imaging systems refer to a range of technologies and tools employed within the operating room to acquire high-quality images of the anatomy of patients during surgery. These systems are often integrated into surgical suites and can include various imaging modalities, such as X-ray, ultrasound, magnetic resonance imaging (MRI), computed tomography (CT), and fluoroscopy. They provide surgeons with precise real-time imaging during complex procedures. They help in identifying the location and extent of tumors, anatomical abnormalities, or other critical structures, enabling surgeons to navigate and manipulate delicate tissues more accurately. They also aid in the identification and localization of tumors within the body. Surgeons can

use imaging techniques like intraoperative MRI or ultrasound to precisely locate tumors and ensure their complete removal while minimizing damage to healthy surrounding tissues.

Breakup by Application:

Cardiovascular Applications

Neurosurgical Applications

Thoracic Applications

Orthopedic Applications

Others

Cardiovascular applications hold the largest share in the market

A detailed breakup and analysis of the market based on the application have also been provided in the report. This includes cardiovascular applications, neurosurgical applications, thoracic applications, orthopedic applications, and others. According to the report, cardiovascular applications accounted for the largest market share.

The use of a hybrid operating room (OR) in cardiovascular applications is revolutionizing the field of cardiovascular surgery by combining the benefits of traditional surgical techniques with advanced imaging and minimally invasive interventions. It is particularly beneficial for complex cardiac procedures, consisting transcatheter aortic valve replacement (TAVR), mitral valve repair, or complex coronary artery bypass grafting (CABG). The integrated imaging systems enable real-time visualization of the heart and blood vessels, allowing surgeons to perform minimally invasive interventions with high precision. It also facilitates minimally invasive procedures, reducing the need for open-heart surgery and its associated risks. It allows for seamless integration between imaging and surgical procedures. Furthermore, it facilitates a hybrid approach, combining both surgical and interventional techniques in a single procedure.

Breakup by End User:

Hospital and Surgical Centers

Ambulatory Surgical Centers

Hospital and surgical centers hold the largest share in the market

A detailed breakup and analysis of the market based on the end-user have also been provided in the report. This includes hospital and surgical centers and ambulatory surgical centers. According to the report, hospital and surgical centers accounted for the largest market share.

Hospitals and surgical centers require hybrid ORs for several reasons, as they offer numerous advantages that significantly enhance patient care and surgical outcomes. Hybrid ORs are equipped with state-of-the-art imaging technologies, such as fluoroscopy, angiography, CT, or MRI. These imaging modalities provide real-time visualization of anatomical structures, blood flow, and device placement during surgical procedures. The availability of advanced imaging capabilities within the OR allows for precise diagnosis, accurate guidance during interventions, and immediate assessment of treatment effectiveness. Hybrid ORs are also suitable for performing minimally invasive procedures. The advanced imaging systems enable surgeons to visualize and navigate through complex anatomical structures using catheters, guidewires, or other specialized instruments. Moreover, minimally invasive techniques reduce patient trauma, promote faster recovery times, and decrease the risk of complications compared to traditional open surgeries.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest hybrid operating room market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America held the biggest market share since the region has a robust infrastructure for medical research and development (R&D), leading to the creation of innovative imaging technologies, surgical equipment, and integration systems.

Another contributing aspect is the increasing demand for minimally invasive procedures. Besides this, the increasing occurrence of various chronic ailments due to the rising adoption of sedentary lifestyle habits is propelling the growth of the market.

Asia Pacific is estimated to expand further due to the increasing focus on value-based healthcare to achieve better outcomes at lower costs. Moreover, the increasing construction of hospitals, nursing homes, and clinics to provide quality healthcare services to patients is strengthening the growth of the market.

Competitive Landscape:

Key market players are focusing on developing innovative imaging and diagnostic solutions, such as advanced imaging modalities, robotic-assisted surgery technologies, and integrated clinical applications. They are also investing in research and development (R&D) to introduce new products with improved performance, workflow efficiency, and patient safety features. Top companies are offering comprehensive hybrid OR solutions, including imaging systems, surgical tools, and data management platforms. They are focusing on interoperability, integrating their devices and software into a unified ecosystem to enhance workflow efficiency and facilitate data sharing. Leading companies are developing hybrid OR workflow optimization tools and surgical planning software. They are providing surgeons with comprehensive control and access to advanced visualization tools during procedures.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

ALVO Medical

General Electric Company

Getinge AB

Hill-Rom Holdings Inc. (Baxter International Inc.)

IMRIS

Koninklijke Philips N.V.

Siemens Healthineers AG (Siemens AG)

Steris Corporation

Toshiba Corporation

Recent Developments:

In 2023, Getinge AB announced the clearance from US FDA for its Servo-air Lite, which is a wall gas-independent non-invasive mechanical ventilator.

In December 2018, IMRIS announced its agreement with Prince Sultan Military Medical City to build the first IMRIS Surgical Theater in Saudi Arabia, which will offer intraoperative imaging.

In June 2023, Steris Corporation announced the acquisition of surgical instrumentation assets from Becton, Dickinson, and Company to expand, strengthen, and complement their product offerings in the healthcare segment.

Key Questions Answered in This Report

1. What was the size of the global hybrid operating room market in 2023?
2. What is the expected growth rate of the global hybrid operating room market during 2024-2032?

3. What are the key factors driving the global hybrid operating room market?
4. What has been the impact of COVID-19 on the global hybrid operating room market?
5. What is the breakup of the global hybrid operating room market based on the component?
6. What is the breakup of the global hybrid operating room market based on the application?
7. What is the breakup of the global hybrid operating room market based on the end user?
8. What are the key regions in the global hybrid operating room market?
9. Who are the key players/companies in the global hybrid operating room market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL HYBRID OPERATING ROOM MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY COMPONENT

- 6.1 Intraoperative Diagnostic Imaging Systems
 - 6.1.1 Market Trends
 - 6.1.2 Key Segments
 - 6.1.2.1 Angiography Systems
 - 6.1.2.2 MRI Systems
 - 6.1.2.3 CT Systems
 - 6.1.2.4 Others

- 6.1.3 Market Forecast
- 6.2 Operating Room Fixtures
 - 6.2.1 Market Trends
 - 6.2.2 Key Segments
 - 6.2.2.1 Operating Tables
 - 6.2.2.2 Operating Room Lights
 - 6.2.2.3 Surgical Booms
 - 6.2.2.4 Radiation Shields
 - 6.2.3 Market Forecast
- 6.3 Surgical Instruments
 - 6.3.1 Market Trends
 - 6.3.2 Market Forecast
- 6.4 Audiovisual Display Systems and Tools
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast
- 6.5 Others
 - 6.5.1 Market Trends
 - 6.5.2 Market Forecast

7 MARKET BREAKUP BY APPLICATION

- 7.1 Cardiovascular Applications
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Neurosurgical Applications
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Thoracic Applications
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Orthopedic Applications
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast
- 7.5 Others
 - 7.5.1 Market Trends
 - 7.5.2 Market Forecast

8 MARKET BREAKUP BY END USER

8.1 Hospital and Surgical Centers

8.1.1 Market Trends

8.1.2 Market Forecast

8.2 Ambulatory Surgical Centers

8.2.1 Market Trends

8.2.2 Market Forecast

9 MARKET BREAKUP BY REGION

9.1 North America

9.1.1 United States

9.1.1.1 Market Trends

9.1.1.2 Market Forecast

9.1.2 Canada

9.1.2.1 Market Trends

9.1.2.2 Market Forecast

9.2 Asia-Pacific

9.2.1 China

9.2.1.1 Market Trends

9.2.1.2 Market Forecast

9.2.2 Japan

9.2.2.1 Market Trends

9.2.2.2 Market Forecast

9.2.3 India

9.2.3.1 Market Trends

9.2.3.2 Market Forecast

9.2.4 South Korea

9.2.4.1 Market Trends

9.2.4.2 Market Forecast

9.2.5 Australia

9.2.5.1 Market Trends

9.2.5.2 Market Forecast

9.2.6 Indonesia

9.2.6.1 Market Trends

9.2.6.2 Market Forecast

9.2.7 Others

9.2.7.1 Market Trends

9.2.7.2 Market Forecast

9.3 Europe

9.3.1 Germany

9.3.1.1 Market Trends

9.3.1.2 Market Forecast

9.3.2 France

9.3.2.1 Market Trends

9.3.2.2 Market Forecast

9.3.3 United Kingdom

9.3.3.1 Market Trends

9.3.3.2 Market Forecast

9.3.4 Italy

9.3.4.1 Market Trends

9.3.4.2 Market Forecast

9.3.5 Spain

9.3.5.1 Market Trends

9.3.5.2 Market Forecast

9.3.6 Russia

9.3.6.1 Market Trends

9.3.6.2 Market Forecast

9.3.7 Others

9.3.7.1 Market Trends

9.3.7.2 Market Forecast

9.4 Latin America

9.4.1 Brazil

9.4.1.1 Market Trends

9.4.1.2 Market Forecast

9.4.2 Mexico

9.4.2.1 Market Trends

9.4.2.2 Market Forecast

9.4.3 Others

9.4.3.1 Market Trends

9.4.3.2 Market Forecast

9.5 Middle East and Africa

9.5.1 Market Trends

9.5.2 Market Breakup by Country

9.5.3 Market Forecast

10 SWOT ANALYSIS

10.1 Overview

- 10.2 Strengths
- 10.3 Weaknesses
- 10.4 Opportunities
- 10.5 Threats

11 VALUE CHAIN ANALYSIS

12 PORTERS FIVE FORCES ANALYSIS

- 12.1 Overview
- 12.2 Bargaining Power of Buyers
- 12.3 Bargaining Power of Suppliers
- 12.4 Degree of Competition
- 12.5 Threat of New Entrants
- 12.6 Threat of Substitutes

13 PRICE ANALYSIS

14 COMPETITIVE LANDSCAPE

- 14.1 Market Structure
- 14.2 Key Players
- 14.3 Profiles of Key Players
 - 14.3.1 ALVO Medical
 - 14.3.1.1 Company Overview
 - 14.3.1.2 Product Portfolio
 - 14.3.2 General Electric Company
 - 14.3.2.1 Company Overview
 - 14.3.2.2 Product Portfolio
 - 14.3.2.3 Financials
 - 14.3.2.4 SWOT Analysis
 - 14.3.3 Getinge AB
 - 14.3.3.1 Company Overview
 - 14.3.3.2 Product Portfolio
 - 14.3.3.3 Financials
 - 14.3.3.4 SWOT Analysis
 - 14.3.4 Hill-Rom Holdings Inc. (Baxter International Inc.)
 - 14.3.4.1 Company Overview
 - 14.3.4.2 Product Portfolio

- 14.3.4.3 SWOT Analysis
- 14.3.5 IMRIS
 - 14.3.5.1 Company Overview
 - 14.3.5.2 Product Portfolio
- 14.3.6 Koninklijke Philips N.V.
 - 14.3.6.1 Company Overview
 - 14.3.6.2 Product Portfolio
 - 14.3.6.3 Financials
 - 14.3.6.4 SWOT Analysis
- 14.3.7 Siemens Healthineers AG (Siemens AG)
 - 14.3.7.1 Company Overview
 - 14.3.7.2 Product Portfolio
 - 14.3.7.3 Financials
 - 14.3.7.4 SWOT Analysis
- 14.3.8 Steris Corporation
 - 14.3.8.1 Company Overview
 - 14.3.8.2 Product Portfolio
- 14.3.9 Toshiba Corporation
 - 14.3.9.1 Company Overview
 - 14.3.9.2 Product Portfolio

List Of Tables

LIST OF TABLES

Table 1: Global: Hybrid Operating Room Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Hybrid Operating Room Market Forecast: Breakup by Component (in Million US\$), 2024-2032

Table 3: Global: Hybrid Operating Room Market Forecast: Breakup by Application (in Million US\$), 2024-2032

Table 4: Global: Hybrid Operating Room Market Forecast: Breakup by End User (in Million US\$), 2024-2032

Table 5: Global: Hybrid Operating Room Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 6: Global: Hybrid Operating Room Market: Competitive Structure

Table 7: Global: Hybrid Operating Room Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Hybrid Operating Room Market: Major Drivers and Challenges

Figure 2: Global: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018-2023

Figure 3: Global: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 4: Global: Hybrid Operating Room Market: Breakup by Component (in %), 2023

Figure 5: Global: Hybrid Operating Room Market: Breakup by Application (in %), 2023

Figure 6: Global: Hybrid Operating Room Market: Breakup by End User (in %), 2023

Figure 7: Global: Hybrid Operating Room Market: Breakup by Region (in %), 2023

Figure 8: Global: Hybrid Operating Room (Intraoperative Diagnostic Imaging Systems) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 9: Global: Hybrid Operating Room (Intraoperative Diagnostic Imaging Systems) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 10: Global: Hybrid Operating Room (Operating Room Fixtures) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 11: Global: Hybrid Operating Room (Operating Room Fixtures) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 12: Global: Hybrid Operating Room (Surgical Instruments) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 13: Global: Hybrid Operating Room (Surgical Instruments) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 14: Global: Hybrid Operating Room (Audiovisual Display Systems and Tools) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 15: Global: Hybrid Operating Room (Audiovisual Display Systems and Tools) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 16: Global: Hybrid Operating Room (Other Components) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 17: Global: Hybrid Operating Room (Other Components) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 18: Global: Hybrid Operating Room (Cardiovascular Applications) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 19: Global: Hybrid Operating Room (Cardiovascular Applications) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 20: Global: Hybrid Operating Room (Neurosurgical Applications) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 21: Global: Hybrid Operating Room (Neurosurgical Applications) Market
Forecast: Sales Value (in Million US\$), 2024-2032

Figure 22: Global: Hybrid Operating Room (Thoracic Applications) Market: Sales Value
(in Million US\$), 2018 & 2023

Figure 23: Global: Hybrid Operating Room (Thoracic Applications) Market Forecast:
Sales Value (in Million US\$), 2024-2032

Figure 24: Global: Hybrid Operating Room (Orthopedic Applications) Market: Sales
Value (in Million US\$), 2018 & 2023

Figure 25: Global: Hybrid Operating Room (Orthopedic Applications) Market Forecast:
Sales Value (in Million US\$), 2024-2032

Figure 26: Global: Hybrid Operating Room (Other Applications) Market: Sales Value (in
Million US\$), 2018 & 2023

Figure 27: Global: Hybrid Operating Room (Other Applications) Market Forecast: Sales
Value (in Million US\$), 2024-2032

Figure 28: Global: Hybrid Operating Room (Hospital and Surgical Centers) Market:
Sales Value (in Million US\$), 2018 & 2023

Figure 29: Global: Hybrid Operating Room (Hospital and Surgical Centers) Market
Forecast: Sales Value (in Million US\$), 2024-2032

Figure 30: Global: Hybrid Operating Room (Ambulatory Surgical Centers) Market: Sales
Value (in Million US\$), 2018 & 2023

Figure 31: Global: Hybrid Operating Room (Ambulatory Surgical Centers) Market
Forecast: Sales Value (in Million US\$), 2024-2032

Figure 32: North America: Hybrid Operating Room Market: Sales Value (in Million US\$),
2018 & 2023

Figure 33: North America: Hybrid Operating Room Market Forecast: Sales Value (in
Million US\$), 2024-2032

Figure 34: United States: Hybrid Operating Room Market: Sales Value (in Million US\$),
2018 & 2023

Figure 35: United States: Hybrid Operating Room Market Forecast: Sales Value (in
Million US\$), 2024-2032

Figure 36: Canada: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018
& 2023

Figure 37: Canada: Hybrid Operating Room Market Forecast: Sales Value (in Million
US\$), 2024-2032

Figure 38: Asia-Pacific: Hybrid Operating Room Market: Sales Value (in Million US\$),
2018 & 2023

Figure 39: Asia-Pacific: Hybrid Operating Room Market Forecast: Sales Value (in Million
US\$), 2024-2032

Figure 40: China: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 &

2023

Figure 41: China: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 42: Japan: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 43: Japan: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 44: India: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 45: India: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 46: South Korea: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 47: South Korea: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 48: Australia: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 49: Australia: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 50: Indonesia: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 51: Indonesia: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 52: Others: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 53: Others: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 54: Europe: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 55: Europe: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 56: Germany: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 57: Germany: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 58: France: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 59: France: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 60: United Kingdom: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 61: United Kingdom: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 62: Italy: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 63: Italy: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 64: Spain: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 65: Spain: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 66: Russia: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 67: Russia: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 68: Others: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 69: Others: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 70: Latin America: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 71: Latin America: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 72: Brazil: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 73: Brazil: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 74: Mexico: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 75: Mexico: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 76: Others: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 77: Others: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 78: Middle East and Africa: Hybrid Operating Room Market: Sales Value (in Million US\$), 2018 & 2023

Figure 79: Middle East and Africa: Hybrid Operating Room Market: Breakup by Country

(in %), 2023

Figure 80: Middle East and Africa: Hybrid Operating Room Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 81: Global: Hybrid Operating Room Industry: SWOT Analysis

Figure 82: Global: Hybrid Operating Room Industry: Value Chain Analysis

Figure 83: Global: Hybrid Operating Room Industry: Porter's Five Forces Analysis

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