

# **Intraoperative Imaging Market Report by Product (iCT, iMRI, iUltrasound, C-arm Systems), Application (Neurosurgery, Orthopedic Surgery, ENT Surgery, Oncology Surgery, Trauma Surgery/Emergency room, Cardiovascular, and Others), End Use (Hospitals and Clinics, Ambulatory Surgical Centers, Academic Institutes and Research Laboratories), and Region 2023-2028**

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## **Abstracts**

The global intraoperative imaging market size reached US\$ 2.2 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 3.0 Billion by 2028, exhibiting a growth rate (CAGR) of 5.31% during 2022-2028. The escalating need for precision in complex surgeries, the rising incidences of complex medical conditions, growing emphasis on patient-centric approaches, and continual technological advancements in the power industry are among the key factors driving the market growth.

Intraoperative imaging refers to the use of image-guided technologies during surgical procedures to provide real-time visualization of anatomical structures. Utilizing modalities like MRI, CT, and ultrasound, intraoperative imaging systems help surgeons navigate through complex surgeries with greater accuracy. These imaging systems are particularly critical in procedures that demand high precision, such as neurosurgery, spinal surgeries, and orthopedic interventions. The imaging technology integrates seamlessly with the surgical workflow, enabling clinicians to make data-driven decisions while minimizing the need for surgical revisions. Through sophisticated algorithms and advanced visualization techniques, these systems enhance the surgeon's capabilities, thereby improving patient outcomes.

The global market is primarily driven by the escalating need for precision in complex surgeries. In line with this, advancements in imaging technologies are enhancing surgical outcomes and thus providing an impetus to the market. Moreover, an increasing number of surgical interventions necessitate the use of intraoperative imaging as a significant growth-inducing factor. In addition to this, higher levels of healthcare spending are facilitating more widespread adoption of advanced imaging systems. Besides this, the development of portable and compact devices is expanding the range of surgical environments where these technologies can be applied. Also, continuing medical education and training programs are positively impacting the market by increasing clinician competency in the use of such systems. The market is further driven by governmental support through favorable regulations and funding. Apart from this, rising patient awareness and advocacy are fueling market growth. Other factors include the development of hybrid operating rooms, international collaborations in healthcare technology, and extensive research and development activities.

#### Intraoperative Imaging Market Trends/Drivers:

Rising incidences of complex medical conditions

The burgeoning incidence of complex medical conditions such as tumors, spinal disorders, and cardiovascular diseases is significantly influencing the increased utilization of intraoperative imaging systems. Surgical intervention in these complex cases requires an exceptional level of precision and insight, which intraoperative imaging can provide. These systems deliver real-time, high-quality images that allow clinicians to navigate surgical sites more effectively, thereby reducing risks like tissue damage or incomplete removal of tumors. Furthermore, real-time imaging provides the opportunity for immediate adjustments during the procedure, thereby reducing the need for subsequent surgeries. The implication here is not merely technological; it's profoundly human. The opportunity to improve surgical outcomes can mean reduced morbidity rates, better postoperative recovery, and ultimately, enhanced quality of life for patients. Therefore, as the prevalence of complex medical conditions continues to rise, the importance of intraoperative imaging systems in ensuring effective and safe surgical interventions is expected to grow concomitantly, thereby driving market expansion.

Continual technological advancements in the power industry

Artificial intelligence (AI) is increasingly becoming a revolutionary force in healthcare,

and its integration with intraoperative imaging systems is no exception. AI algorithms can sift through vast data sets, identifying patterns and nuances that may be imperceptible to the human eye. When applied to intraoperative imaging, these capabilities result in more accurate image interpretations and predictive analytics. For instance, AI can potentially predict tissue responses and recommend adjustments in real-time, further empowering surgeons in their decision-making processes. This technological synergy between AI and intraoperative imaging represents an evolution of surgical practices, offering a new level of precision and control. Therefore, the integration of AI with intraoperative imaging is perceived as a game-changing factor that has a considerable impact on market growth by adding layers of sophistication and effectiveness to existing systems.

### Growing emphasis on patient-centric approaches

In the contemporary healthcare landscape, there is a discernible shift towards patient-centric care models. These models prioritize not just the effectiveness of medical treatments but also consider the patient's comfort, dignity, and overall well-being. Intraoperative imaging contributes substantially to this paradigm. By enabling greater precision, these systems minimize the invasiveness of surgical procedures, thus aiding in faster recovery and reduced postoperative complications. In essence, the technology serves dual purposes; it enhances surgical effectiveness while also promoting patient comfort and safety. For instance, the less invasive a procedure, the quicker the recovery time, which translates into shorter hospital stays and lower healthcare costs. These benefits resonate strongly with current healthcare paradigms that emphasize patient satisfaction and holistic well-being. Therefore, the alignment of intraoperative imaging technologies with patient-centric healthcare approaches is an essential driver for its increasing adoption and subsequent market growth.

### Intraoperative Imaging Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market report, along with forecasts at the global, regional, and country levels from 2023-2028. Our report has categorized the market based on product, application, and end use.

### Breakup by Product:

iCT

iMRI

iUltrasound

C-arm Systems

C-arm systems account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the product. This includes iCT, iMRI, iUltrasound and C-arm systems. According to the report, c-arm systems represented the largest segment.

For the C-arm systems segment in the global intraoperative imaging market, several factors are currently propelling its growth. The increasing need for real-time imaging during surgical interventions is one primary driver. Surgeons are continually seeking improved visual guidance to enhance the precision of their procedures, thus fostering demand for C-arm systems. Moreover, technological advancements are offering features such as higher resolution and mobility, further fueling adoption. Regulatory approvals are also enabling quicker market entry for innovative C-arm products. Investments in healthcare infrastructure and the availability of funding for advanced medical equipment also contribute to this upward trend. Hence, a blend of technological, regulatory, and financial factors is driving the growth of the C-arm systems segment.

Breakup by Application:

- Neurosurgery
- Orthopedic Surgery
- ENT Surgery
- Oncology Surgery
- Trauma Surgery/Emergency room
- Cardiovascular
- Others

Neurosurgery dominates the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes neurosurgery, orthopedic surgery, ENT surgery, oncology surgery, trauma surgery/emergency room, cardiovascular, and others. According to the report, neurosurgery represented the largest segment.

The neurosurgery segment is experiencing growth due to an increasing incidence of neurological disorders and the consequent rise in neurosurgical procedures. Precision is paramount in neurosurgery, and intraoperative imaging provides the necessary real-

time insights for better surgical outcomes. Technological advancements are enabling more detailed and faster imaging, which is particularly crucial in complex neurological procedures. Additionally, ongoing research and development efforts aim to make these systems more adaptable to the specific needs of neurosurgery. The increasing availability of skilled neurosurgeons familiar with intraoperative imaging technologies also positively influences this segment. Investments in specialized healthcare settings, like neurosurgical centers, further accelerate this growth. Thus, both clinical demands and technological developments are spurring the growth of the Neurosurgery segment in the global market.

#### Breakup by End Use:

Hospitals and Clinics

Ambulatory Surgical Centers

Academic Institutes and Research Laboratories

Hospitals and clinics represent the largest market segment

The report has provided a detailed breakup and analysis of the market based on the end use. This includes hospitals and clinics, ambulatory surgical centers, and academic institutes and research laboratories. According to the report, hospitals and clinics represented the largest segment.

In the hospitals and clinics segment, the emphasis on quality healthcare delivery is acting as a significant growth factor. These institutions are investing in advanced intraoperative imaging technologies to ensure better patient outcomes. Furthermore, increasing patient volumes and complexities of surgical procedures necessitate the adoption of reliable and accurate imaging systems. The availability of specialized personnel trained in operating such equipment is another driver. Additionally, collaborations between hospitals and manufacturers for custom solutions are becoming commonplace. Enhanced focus on minimally invasive surgeries, which require real-time imaging support, is also a contributing factor. Thus, various operational and clinical needs are driving the growth of intraoperative imaging in hospitals and clinics.

#### 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 intraoperative imaging market share

The market research 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.

In the North America region, several factors are collectively driving the growth of the intraoperative imaging market. The well-established healthcare infrastructure provides a strong foundation for the adoption of advanced medical technologies. Governmental support in the form of research grants and favorable policies is also fostering market growth.

Additionally, the region boasts a high prevalence of chronic conditions that often require

surgical interventions, subsequently boosting the demand for intraoperative imaging. A focus on delivering quality healthcare and patient safety mandates the need for precise and reliable imaging systems.

Furthermore, the presence of a skilled healthcare workforce trained in the operation of advanced equipment amplifies market growth. Industry-academia collaborations are also quite prevalent, enabling faster innovation and application of intraoperative imaging technologies. Finally, the consumer awareness and willingness to opt for advanced healthcare solutions contribute to making North America a significant player in the global market.

#### Competitive Landscape:

The leading companies are consistently focusing on technological advancements to improve the accuracy and efficiency of their imaging systems. By collaborating with healthcare providers and research institutions, these market players are fine-tuning the integration of imaging technologies within surgical workflows. They are currently working on enhancing the interoperability of their systems to enable seamless data exchange across different platforms. Regulatory compliance is another area where substantial efforts are being made to meet stringent medical standards. Ongoing clinical trials and research studies are also being sponsored to validate the efficacy of new imaging modalities. Robust after-sales support services, including training and maintenance, are being provided to ensure customer satisfaction and long-term relationships. Through these varied strategies, key players are solidifying their market positions and contributing to the overall growth of the global intraoperative imaging market.

The market research 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:

Brainlab AG  
Canon Inc.  
General Electric Company  
IMRIS (Deerfield Imaging Inc.)  
Koninklijke Philips N.V.  
Medtronic plc  
NeuroLogica Corp. (Samsung Electronics Co. Ltd.)  
Shenzhen Anke High-Tech Co. Ltd  
Shimadzu Corporation

Siemens Ag  
Stryker Corporation  
Ziehm Imaging GmbH

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

#### Recent Developments:

In June 2023, Brainlab AG announced an expanded collaboration outlining initiatives in their ongoing work with the AO Foundation. The AO will leverage Brainlab technology, including Mixed Reality Viewer, for craniomaxillofacial (CMF), spine and trauma education.

In September 2023, Canon Inc. Europe entered into a five-year partnership with EPA Images to upgrade its photography and videography equipment, focusing on Canon's advanced EOS R System full-frame mirrorless cameras and RF lenses. The partnership also includes extensive training and enrollment in Canon Professional Services to ensure effective utilization of the new technology.

In September 2022, IMRIS (Deerfield Imaging Inc.) announced the acquisition of Superconducting Systems, Inc. (SSI), Billerica, MA. SSI designs and develops cryogen-free (liquid helium free) superconducting magnets for medical and research applications. SSI magnets are used in commercial MRI systems throughout the world.

#### Key Questions Answered in This Report

1. What was the size of the global intraoperative imaging market in 2022?
2. What is the expected growth rate of the global intraoperative imaging market during 2023-2028?
3. What are the key factors driving the global intraoperative imaging market?
4. What has been the impact of COVID-19 on the global intraoperative imaging market?
5. What is the breakup of the global intraoperative imaging market based on the product?
6. What is the breakup of the global intraoperative imaging market based on the application?
7. What is the breakup of the global intraoperative imaging market based on the end use?
8. What are the key regions in the global intraoperative imaging market?
9. Who are the key players/companies in the global intraoperative imaging 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 INTRAOPERATIVE IMAGING MARKET**

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

### **6 MARKET BREAKUP BY PRODUCT**

- 6.1 iCT
  - 6.1.1 Market Trends
  - 6.1.2 Market Forecast
- 6.2 iMRI
  - 6.2.1 Market Trends
  - 6.2.2 Market Forecast
- 6.3 iUltrasound

- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 C-arm Systems
  - 6.4.1 Market Trends
  - 6.4.2 Market Forecast

## **7 MARKET BREAKUP BY APPLICATION**

- 7.1 Neurosurgery
  - 7.1.1 Market Trends
  - 7.1.2 Market Forecast
- 7.2 Orthopedic Surgery
  - 7.2.1 Market Trends
  - 7.2.2 Market Forecast
- 7.3 ENT Surgery
  - 7.3.1 Market Trends
  - 7.3.2 Market Forecast
- 7.4 Oncology Surgery
  - 7.4.1 Market Trends
  - 7.4.2 Market Forecast
- 7.5 Trauma Surgery/Emergency room
  - 7.5.1 Market Trends
  - 7.5.2 Market Forecast
- 7.6 Cardiovascular
  - 7.6.1 Market Trends
  - 7.6.2 Market Forecast
- 7.7 Others
  - 7.7.1 Market Trends
  - 7.7.2 Market Forecast

## **8 MARKET BREAKUP BY END USE**

- 8.1 Hospitals and Clinics
  - 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
- 8.3 Academic Institutes and Research Laboratories

8.3.1 Market Trends

8.3.2 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 Brainlab AG
    - 14.3.1.1 Company Overview
    - 14.3.1.2 Product Portfolio
  - 14.3.2 Canon Inc.
    - 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 General Electric Company
    - 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 IMRIS (Deerfield Imaging Inc.)
    - 14.3.4.1 Company Overview
    - 14.3.4.2 Product Portfolio
  - 14.3.5 Koninklijke Philips N.V.
    - 14.3.5.1 Company Overview
    - 14.3.5.2 Product Portfolio
    - 14.3.5.3 Financials

- 14.3.5.4 SWOT Analysis
- 14.3.6 Medtronic plc
  - 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 NeuroLogica Corp. (Samsung Electronics Co. Ltd.)
  - 14.3.7.1 Company Overview
  - 14.3.7.2 Product Portfolio
- 14.3.8 Shenzhen Anke High-Tech Co. Ltd
  - 14.3.8.1 Company Overview
  - 14.3.8.2 Product Portfolio
- 14.3.9 Shimadzu Corporation
  - 14.3.9.1 Company Overview
  - 14.3.9.2 Product Portfolio
  - 14.3.9.3 Financials
  - 14.3.9.4 SWOT Analysis
- 14.3.10 Siemens Ag
  - 14.3.10.1 Company Overview
  - 14.3.10.2 Product Portfolio
  - 14.3.10.3 Financials
  - 14.3.10.4 SWOT Analysis
- 14.3.11 Stryker Corporation
  - 14.3.11.1 Company Overview
  - 14.3.11.2 Product Portfolio
  - 14.3.11.3 Financials
  - 14.3.11.4 SWOT Analysis
- 14.3.12 Ziehm Imaging GmbH
  - 14.3.12.1 Company Overview
  - 14.3.12.2 Product Portfolio

## List Of Tables

### LIST OF TABLES

Table 1: Global: Intraoperative Imaging Market: Key Industry Highlights, 2022 and 2028

Table 2: Global: Intraoperative Imaging Market Forecast: Breakup by Product (in Million US\$), 2023-2028

Table 3: Global: Intraoperative Imaging Market Forecast: Breakup by Application (in Million US\$), 2023-2028

Table 4: Global: Intraoperative Imaging Market Forecast: Breakup by End Use (in Million US\$), 2023-2028

Table 5: Global: Intraoperative Imaging Market Forecast: Breakup by Region (in Million US\$), 2023-2028

Table 6: Global: Intraoperative Imaging Market: Competitive Structure

Table 7: Global: Intraoperative Imaging Market: Key Players

## List Of Figures

### LIST OF FIGURES

Figure 1: Global: Intraoperative Imaging Market: Major Drivers and Challenges

Figure 2: Global: Intraoperative Imaging Market: Sales Value (in Billion US\$), 2017-2022

Figure 3: Global: Intraoperative Imaging Market Forecast: Sales Value (in Billion US\$), 2023-2028

Figure 4: Global: Intraoperative Imaging Market: Breakup by Product (in %), 2022

Figure 5: Global: Intraoperative Imaging Market: Breakup by Application (in %), 2022

Figure 6: Global: Intraoperative Imaging Market: Breakup by End Use (in %), 2022

Figure 7: Global: Intraoperative Imaging Market: Breakup by Region (in %), 2022

Figure 8: Global: Intraoperative Imaging (iCT) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 9: Global: Intraoperative Imaging (iCT) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 10: Global: Intraoperative Imaging (iMRI) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 11: Global: Intraoperative Imaging (iMRI) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 12: Global: Intraoperative Imaging (iUltrasound) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 13: Global: Intraoperative Imaging (iUltrasound) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 14: Global: Intraoperative Imaging (C-arm Systems) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 15: Global: Intraoperative Imaging (C-arm Systems) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 16: Global: Intraoperative Imaging (Neurosurgery) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 17: Global: Intraoperative Imaging (Neurosurgery) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 18: Global: Intraoperative Imaging (Orthopedic Surgery) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 19: Global: Intraoperative Imaging (Orthopedic Surgery) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 20: Global: Intraoperative Imaging (ENT Surgery) Market: Sales Value (in Million US\$), 2017 & 2022



Figure 21: Global: Intraoperative Imaging (ENT Surgery) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 22: Global: Intraoperative Imaging (Oncology Surgery) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 23: Global: Intraoperative Imaging (Oncology Surgery) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 24: Global: Intraoperative Imaging (Trauma Surgery/Emergency Room) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 25: Global: Intraoperative Imaging (Trauma Surgery/Emergency Room) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 26: Global: Intraoperative Imaging (Cardiovascular) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 27: Global: Intraoperative Imaging (Cardiovascular) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 28: Global: Intraoperative Imaging (Other Applications) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 29: Global: Intraoperative Imaging (Other Applications) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 30: Global: Intraoperative Imaging (Hospitals and Clinics) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 31: Global: Intraoperative Imaging (Hospitals and Clinics) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 32: Global: Intraoperative Imaging (Ambulatory Surgical Centers) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 33: Global: Intraoperative Imaging (Ambulatory Surgical Centers) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 34: Global: Intraoperative Imaging (Academic Institutes and Research Laboratories) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 35: Global: Intraoperative Imaging (Academic Institutes and Research Laboratories) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 36: North America: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 37: North America: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 38: United States: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 39: United States: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 40: Canada: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 &

2022

Figure 41: Canada: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 42: Asia-Pacific: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 43: Asia-Pacific: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 44: China: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 45: China: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 46: Japan: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 47: Japan: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 48: India: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 49: India: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 50: South Korea: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 51: South Korea: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 52: Australia: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 53: Australia: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 54: Indonesia: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 55: Indonesia: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 56: Others: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 57: Others: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 58: Europe: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 59: Europe: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 60: Germany: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 61: Germany: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 62: France: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 63: France: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 64: United Kingdom: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 65: United Kingdom: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 66: Italy: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 67: Italy: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 68: Spain: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 69: Spain: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 70: Russia: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 71: Russia: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 72: Others: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 73: Others: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 74: Latin America: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 75: Latin America: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 76: Brazil: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 77: Brazil: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 78: Mexico: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 79: Mexico: Intraoperative Imaging Market Forecast: Sales Value (in Million

US\$), 2023-2028

Figure 80: Others: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 81: Others: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 82: Middle East and Africa: Intraoperative Imaging Market: Sales Value (in Million US\$), 2017 & 2022

Figure 83: Middle East and Africa: Intraoperative Imaging Market: Breakup by Country (in %), 2022

Figure 84: Middle East and Africa: Intraoperative Imaging Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 85: Global: Intraoperative Imaging Industry: SWOT Analysis

Figure 86: Global: Intraoperative Imaging Industry: Value Chain Analysis

Figure 87: Global: Intraoperative Imaging Industry: Porter's Five Forces Analysis

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