Surgical Imaging Market by Technology (Image Intensifier C-arms, Flat Panel Detector C-arms), Application (Orthopedic & Trauma Surgeries, Neurosurgeries, Cardiovascular Surgeries), End User (Hospital, Surgery Center) - Global Forecasts to 2025

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Abstracts

The global surgical imaging market is projected to reach USD 2.4 billion by 2025 from an estimated USD 1.8 billion in 2020, at a CAGR of 6.3% during the forecast period. The major factors driving the growth of this market include the advantages of FPDs over image intensifiers, technological advancements, reimbursement cuts for analog radiography systems, and the increasing demand for minimally invasive procedures. However, the high cost of systems is estimated to restrain the growth of this market during the forecast period.

The image intensifier technology segment is expected to account for the largest share during the forecast period."

Based on technology, the surgical imaging market has been segmented into image intensifier C-arms and FPD C-arms. The image intensifier C-arms segment commanded the largest share of 75.1% of the market in 2019. However, the FPD C-arms segment is projected to register the highest CAGR of 7.7% during the forecast period. The large market share of this segment can be attributed to the large installed base, low price and low maintenance costs of this systems.

"The orthopedic & trauma surgeries application is expected to grow at the highest rate during the forecast period."

Based on application, the market has been segmented into orthopedic & trauma

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surgeries, neurosurgeries, cardiovascular surgeries, gastrointestinal surgeries, and other applications (urological, endobronchial & thoracic, and maxillofacial surgeries). The orthopedic & trauma surgeries segment is the largest and the fastest-growing application segment in this market. This can be attributed to the increasing popularity of minimally invasive procedures in orthopedic and trauma surgeries and the advantage of 3D navigation in these surgeries through the use of C-arms.

“The Hospital end user segment to account for the largest share during the forecast period’”

Based on end users, the market is divided into hospitals and surgery centers. Hospitals are expected to account for the largest share of the surgical imaging market in 2020, while surgery centers are expected to account for the highest growth rate. The large share of this segment can be attributed to the rising demand for effective disease management, growing surgical procedural volumes in hospitals, and the increasing number of hospitals being set up in developing countries.

“North America regional segment to account for the largest market share of the surgical imaging market”

Geographically, the surgical imaging market is segmented into North America, Europe, Asia Pacific (APAC), and the Rest of the World. North America is the largest regional market for surgical imaging systems, followed by Europe. The large share of the North American market can be attributed to the significant growth in hospital expenditure, the increasing incidence of overuse sports injuries, rising prevalence of CVD, and the increasing number of hip and knee replacement surgeries in the region.

Breakdown of supply-side primary interviews: • By Company Type: Tier 1 – 40%, Tier 2 – 30%, and Tier 3 – 30% • By Designation: C-level – 27%, Director-level – 18%, and Others – 55% • By Region: North America - 40%, Europe – 20%, APAC – 30%, Latin America – 8%, and Middle East – 2%

Some of the major market players in the surgical imaging market are GE Healthcare (UK), Siemens AG (Germany), Koninklijke Philips (Netherlands), and Ziehm Imaging (Germany)

Research Coverage

This report studies the surgical imaging market based on technology, application, end

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users, and region. The report also studies factors (such as drivers, restraints, opportunities, and challenges) affecting market growth. It analyzes the opportunities and challenges in the market and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micro markets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to four main regions and respective countries.

Key Benefits of Buying the Report

This report focuses on various levels of analysis—industry trends, market share of top players, and company profiles, which together form basic views and analyze the competitive landscape, emerging segments of the surgical imaging market, and high-growth regions and their drivers, restraints, challenges, and opportunities. The report will help both established firms as well as new entrants/smaller firms to gauge the pulse of the market and garner greater market shares.

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About

This research study involved the usage of extensive secondary sources, directories, and databases such as Hoovers, Bloomberg Businessweek, Factiva, and OneSource, to identify and collect information useful for this technical, market-oriented, and commercial study of the global surgical imaging market. Primary sources were mainly several industry experts from core and related industries and preferred suppliers, manufacturers, distributors, service providers, technology developers, doctors, and organizations related to all segments of this industry's value chain. In-depth interviews were conducted with various primary respondents, which included key industry participants, subject matter experts (SMEs), C-level executives of key market players, and industry consultants to obtain and verify critical qualitative and quantitative information as well as to assess the future growth prospects.

In the secondary research process, various secondary sources were referred to for identifying and collecting information for this study. Secondary sources include annual reports, press releases and investor presentations of companies, white papers, medical journals, certified publications, articles from recognized authors, gold standard and silver standard websites, disease-specific organizations, directories, and databases.

In the primary research process, various primary sources from both the supply and demand side were interviewed to obtain qualitative and quantitative information for this report. The primary sources from the supply side include industry experts such as CEOs, vice presidents, marketing directors, and related key executives from various key companies and organizations operating in the surgical imaging market. The primary sources from the demand side include doctors and purchasing managers from hospitals.

After the complete market engineering (which includes calculations for market statistics, market crackdown, market size estimations, market forecasting, and data triangulation), extensive primary research was conducted to gather information and to verify and validate the critical numbers arrived at. Primary research was also conducted to identify the segmentation types; industry trends; key players; competitive landscape of surgical imaging products supplied by different types of market players; and key market dynamics such as drivers, restraints, opportunities, industry trends, and key player strategies.

In the complete market engineering process, both top-down and bottom-up approaches were extensively used along with several data triangulation methods to perform market estimation and market forecasting for the overall market segments listed in this report. Extensive qualitative and quantitative analysis was performed on the complete market engineering process to list key information/insights throughout the report.

Both, top-down and bottom-up approaches were used to estimate and validate the size of the global market and to estimate the size of various other dependent submarkets of the overall surgical imaging market. The research methodology used to estimate the market size includes the following details: The key players in the market were identified through secondary research and their market shares in the respective regions were determined through primary and secondary research. This entire procedure includes the study of the annual and financial reports of top market players and extensive interviews for key insights with industry leaders such as CEOs, VPs, directors, and marketing executives. All percentage shares, splits, and breakdowns were determined by using secondary sources and verified through primary sources. All possible parameters that affect the markets covered in this research study have been accounted for, viewed in extensive detail, verified through primary research, and analyzed to get the final quantitative and qualitative data. This data was consolidated and added with detailed inputs and analysis from MarketsandMarkets, andpresented in this report.

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