

# **Intraoperative Imaging Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application**

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## **Abstracts**

### **Intraoperative Imaging Market Summary**

#### **Introduction**

Intraoperative Imaging systems deliver real-time visualization during surgical procedures, utilizing technologies such as C-arms, intraoperative MRI, and CT to enhance precision in neurosurgery, orthopedics, and oncology. The industry is characterized by its emphasis on accuracy, seamless integration with surgical navigation systems, and support for minimally invasive techniques. Key trends include AI-driven image processing, portable and compact imaging devices, and the adoption of hybrid operating rooms, with growth in emerging markets fueled by advancements in healthcare infrastructure.

#### **Market Size and Growth Forecast**

The global Intraoperative Imaging market was valued at USD 2.6–4.1 billion in 2024, with an estimated CAGR of 6.0%–8.0% from 2025 to 2030, driven by the need for surgical precision and technological advancements.

#### **Regional Analysis**

North America grows at 5.8%–7.8%; the U.S. leads with advanced hospital systems, focusing on AI-integrated imaging solutions.

Europe achieves 5.5%–7.5% growth; Germany drives demand, emphasizing hybrid

operating room adoption.

Asia Pacific records 6.5%–8.5% growth; China and Japan are key markets, with trends toward portable imaging devices.

Rest of the World grows at 5.3%–7.3%; India shows potential, prioritizing cost-effective imaging systems.

### Application Analysis

Hospitals & Diagnostic Centers expand at 6.2%–8.2%; they dominate complex surgeries, with trends favoring navigation-integrated systems.

Ambulatory Surgical Centers and Clinics grow at 6.0%–8.0%; they support outpatient procedures, emphasizing compact and portable devices.

Research Laboratories & Academic Institutes rise at 5.8%–7.8%; they drive innovation, focusing on AI-enhanced imaging analytics.

### Key Market Players

General Electric, based in Boston, Massachusetts, USA, is a global leader in intraoperative imaging, offering a wide range of advanced systems like C-arms and intraoperative CT scanners. Its solutions are known for high-resolution imaging and seamless integration with surgical workflows.

Siemens Healthineers, headquartered in Erlangen, Germany, specializes in precision imaging systems, including intraoperative MRI and fluoroscopy devices. The company focuses on durability and advanced software for real-time surgical guidance.

Ziehm Imaging, from Nuremberg, Germany, is a pioneer in mobile C-arm technology, producing compact and versatile imaging systems tailored for orthopedic and endovascular procedures. Its devices emphasize portability and ease of use.

Medtronic, based in Dublin, Ireland, provides intraoperative imaging solutions integrated with its navigation platforms, particularly for neurosurgery and spine procedures. The company is known for its focus on enhancing surgical accuracy.

Koninklijke Philips, headquartered in Amsterdam, Netherlands, offers high-performance

imaging systems with AI-driven analytics, catering to oncology and cardiovascular surgeries. Its solutions prioritize patient safety and operational efficiency.

Canon Healthcare, from Tokyo, Japan, supplies scalable intraoperative imaging systems, with a focus on oncology applications. The company emphasizes high-quality imaging and user-friendly interfaces.

Stryker, based in Kalamazoo, Michigan, USA, provides robust imaging systems for orthopedic surgeries, integrating advanced visualization with its surgical tools. Its products are designed for reliability in high-pressure operating environments.

### Porter's Five Forces Analysis

The threat of new entrants is low; stringent regulatory requirements and high capital costs create significant barriers.

The threat of substitutes is moderate; traditional imaging methods compete, but intraoperative systems offer unmatched real-time precision.

Buyer power is moderate; hospitals and surgical centers demand high-quality systems, but large institutions negotiate pricing.

Supplier power is low; components like sensors and imaging software are widely available, reducing supplier leverage.

Competitive rivalry is high; companies differentiate through AI integration, portability, and hybrid room compatibility.

### Market Opportunities and Challenges

#### Opportunities

Growing demand for minimally invasive surgeries fuels adoption of intraoperative imaging.

AI-driven and portable imaging systems drive market expansion.

Emerging markets offer growth potential as healthcare infrastructure improves in

Asia and Africa.

## Challenges

High costs of advanced imaging systems limit adoption in resource-constrained regions.

Complex regulatory approvals for medical imaging devices increase compliance costs.

Shortages of trained radiologists and surgeons hinder optimal system utilization.

## Growth Trend Analysis

The Intraoperative Imaging market is experiencing robust growth, driven by the need for enhanced surgical precision. On July 15, 2024, Lumicell secured a Category III CPT® Code for intraoperative fluorescence imaging, supporting market expansion. Zimmer Biomet's acquisition of OrthoGrid Systems on August 7, 2024, bolsters orthopedic imaging capabilities. AdventHealth Celebration introduced a molecular imaging process for lung cancer surgery on December 16, 2024, improving accuracy. Grovecourt Capital's acquisition of IMRIS on February 19 and 20, 2025, enhances intraoperative MRI solutions. Ziehm Imaging's new endovascular solution at ECR 2025 on February 24, 2025, and Orthoscan's VERSA Mini C-Arm launch on March 4, 2025, align with a projected CAGR of 6.0%–8.0% through 2030, reflecting ongoing technological innovation.

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