

# **Patient Positioning Systems Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Product (Tables, Accessories), By Application (Surgery, Diagnostics, Others), By End Use (Hospitals, Ambulatory centers, Others), By Region, and By Competition**

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## **Abstracts**

Global Patient Positioning Systems Market was valued at USD 1.16 billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.11% through 2029. The market is anticipated to experience growth in the foreseeable future due to several factors. These include the expanding elderly demographic, a higher incidence of cancer, greater patient awareness, and increased investments in diagnostic procedures. Key drivers for the patient positioning equipment market are technological advancements and the growing prevalence of non-communicable diseases. As an illustration, in February 2022, Mireye unveiled its intelligent imaging technology, which automates the patient positioning for X-ray exams.

### **Key Market Drivers**

#### **Aging Population and Increased Healthcare Needs**

The global healthcare landscape is undergoing a significant transformation, with one of the most influential drivers of change being the aging population and the corresponding surge in healthcare needs. As the elderly demographic expands, the demand for medical services and interventions rises in tandem.

Across the globe, populations are aging at an unprecedented rate. Advances in

healthcare, improved living conditions, and a decline in fertility rates have contributed to a substantial increase in life expectancy. While this demographic shift is a testament to human progress, it also brings new challenges.

As people age, they become more susceptible to age-related health conditions, such as osteoarthritis, fractures, and neurological disorders. These conditions often require medical procedures, and in many cases, surgical interventions. Patient positioning systems play a pivotal role in ensuring the success of these procedures, as they facilitate precision and reduce the risk of complications.

The aging population requires specialized care tailored to their unique healthcare needs. Healthcare facilities are responding by creating geriatric units and services to address the complex health issues faced by the elderly. Patient positioning systems, designed to prioritize patient safety and comfort, are integral to providing quality care in these specialized units.

Long-term care facilities, including nursing homes and assisted living centers, are experiencing increased demand as older adults require assistance with daily activities and ongoing medical care. These facilities rely on patient positioning systems to ensure the well-being and comfort of residents, which, in turn, boosts the demand for such systems.

The aging population isn't the sole factor driving the demand for patient positioning systems. The overall increase in healthcare needs, across all age groups, plays a pivotal role in this growth story.

Chronic diseases, such as heart disease, cancer, diabetes, and respiratory disorders, are affecting individuals of all age groups. As the prevalence of these conditions rises, so does the demand for diagnostic and therapeutic procedures. Patient positioning systems are essential for ensuring accurate treatment and monitoring for patients with chronic illnesses.

Surgical procedures are a fundamental component of modern healthcare. Whether it's a routine appendectomy or a complex cardiac surgery, patient positioning systems are critical for precise patient placement. They enable surgeons to operate with greater accuracy, which is particularly important in procedures on elderly patients with multiple comorbidities.

## Rising Incidence of Chronic Diseases

The global healthcare landscape is witnessing a remarkable transformation, largely fueled by the escalating incidence of chronic diseases. These persistent health conditions, such as cancer, cardiovascular diseases, diabetes, and respiratory disorders, have become a global health concern, impacting millions of lives. Amid this health crisis, patient positioning systems have emerged as indispensable tools, shaping the growth of the global patient positioning systems market.

Chronic diseases have become a significant public health challenge worldwide. The World Health Organization (WHO) estimates that chronic diseases are responsible for approximately 71% of all global deaths. As these diseases continue to affect a growing number of individuals, the need for early diagnosis, effective treatment, and therapeutic interventions has never been more critical.

Patient positioning systems play a pivotal role in ensuring precise diagnostics and interventions for individuals with chronic conditions. These systems enable healthcare professionals to accurately position patients during imaging, radiation therapy, and surgical procedures. By reducing the margin of error, patient positioning systems enhance the effectiveness of diagnostic tests and treatment, ultimately leading to better patient outcomes.

In the realm of cancer care, the demand for patient positioning systems is particularly pronounced. Radiotherapy is a common modality for cancer treatment, and precise patient positioning is essential to target tumors while minimizing damage to healthy tissue. These systems assist in ensuring that patients are in the correct position during each session, improving the efficiency and effectiveness of radiation therapy.

Chronic disease patients often undergo prolonged and repeated medical procedures. Prolonged periods of immobility during these procedures can lead to complications such as pressure ulcers, nerve damage, or musculoskeletal injuries. Patient positioning systems are designed to enhance patient comfort while mitigating the risk of such complications. This focus on safety and patient well-being has spurred the adoption of these systems in healthcare facilities worldwide.

Chronic diseases may require frequent imaging procedures, such as CT scans or X-rays, to monitor the progression of the condition and treatment effectiveness. Patient positioning systems assist in accurate positioning, reducing the need for repeated scans and thus minimizing a patient's exposure to radiation. This is of paramount importance, particularly for patients receiving long-term care.

Technological advancements have significantly advanced patient positioning systems. Intelligent imaging technology and robotic-assisted surgery have elevated the precision and efficiency of these systems. These technological enhancements have become critical as healthcare providers seek to provide the best possible care to patients with chronic diseases.

## Patient Safety and Comfort

In the ever-evolving landscape of healthcare, patient safety and comfort have become non-negotiable priorities. As patients increasingly demand higher standards of care, the role of patient positioning systems in ensuring their well-being and comfort cannot be overstated.

Patient safety has risen to the forefront of healthcare priorities. Medical errors, injuries, and complications during diagnostic and therapeutic procedures have garnered significant attention. As a response to these concerns, healthcare providers and institutions are actively seeking ways to enhance safety measures throughout the care continuum.

One of the primary functions of patient positioning systems is to minimize the risk of complications during medical procedures. These systems assist in precise and stable patient positioning, reducing the likelihood of complications such as pressure ulcers, nerve damage, or musculoskeletal injuries. By safeguarding against these adverse events, patient positioning systems contribute to improved patient safety.

Surgical interventions, whether routine or complex, necessitate precise patient positioning. Misalignment can lead to complications, longer recovery times, and less successful outcomes. Patient positioning systems are indispensable in the surgical theater, ensuring that patients are placed accurately and comfortably, enhancing safety, and improving the overall quality of surgical procedures.

For accurate diagnostic imaging, it is crucial that the patient is positioned correctly. Patient positioning systems are employed to optimize the patient's posture during X-rays, CT scans, and MRI procedures. This accuracy not only improves diagnostic outcomes but also minimizes the need for repeat imaging, thereby reducing radiation exposure and enhancing overall patient safety.

Patient falls are a significant concern in healthcare settings, especially among the

elderly and those with limited mobility. Proper patient positioning is crucial to prevent falls, and positioning systems help in ensuring that patients are stable and secure during various medical activities, from transferring patients to repositioning them in bed.

Patient comfort is intertwined with their overall experience within the healthcare system. When patients feel comfortable and at ease, they are more likely to cooperate with treatment plans and have improved mental well-being. Patient positioning systems are designed with patient comfort in mind, offering adjustable and ergonomic features to enhance the overall experience during procedures and hospital stays.

### Enhanced Diagnostic and Therapeutic Procedures

The healthcare landscape is continually evolving, and as the demand for precision and patient-centric care surges, patient positioning systems have emerged as crucial tools in ensuring the success of diagnostic and therapeutic procedures.

Accurate diagnosis and targeted treatment are fundamental in modern healthcare. Patient positioning systems play a pivotal role in ensuring precision during diagnostic procedures such as X-rays, CT scans, MRI scans, and ultrasound. These systems enable healthcare professionals to position patients with utmost accuracy, leading to more reliable results and improved patient outcomes.

In the realm of oncology, precision is of paramount importance. Radiation therapy is a common modality for cancer treatment, and patient positioning systems are instrumental in this process. These systems assist in maintaining the exact position of the patient during radiation therapy, ensuring that the cancerous cells are targeted while minimizing damage to surrounding healthy tissue. This precision is driving the adoption of patient positioning systems in cancer care.

In therapeutic procedures, even a small margin of error can have significant consequences. Patient positioning systems are designed to minimize this margin of error, ensuring that patients are correctly positioned for surgery, radiation therapy, or other treatments. This reduced margin of error is not only beneficial for patients but also leads to cost savings in healthcare by reducing the need for repeat procedures.

In the surgical theater, patient positioning systems are indispensable. Proper patient positioning is critical to the success of surgeries, be they routine procedures or complex operations. These systems assist in placing patients accurately and securely, which can lead to shorter surgery times, fewer complications, and faster recovery.

Patient positioning systems aren't just about precision; they also prioritize patient comfort. A more comfortable patient experience not only leads to better patient satisfaction but also increases the likelihood of successful diagnostic and therapeutic procedures. Patients who are at ease are more likely to cooperate with treatment plans and have improved overall mental well-being.

Patient safety is a key concern in diagnostic procedures involving radiation. Patient positioning systems help minimize the need for repeat scans, reducing a patient's exposure to radiation. This is especially important for chronic conditions or diseases that require ongoing monitoring, as it helps mitigate the risks associated with excessive radiation exposure.

## Key Market Challenges

### High Costs and Budget Constraints

Patient positioning systems, while crucial for patient care, can be expensive. Budget constraints in healthcare facilities, particularly in resource-limited settings, can hinder the adoption of these advanced systems. The challenge lies in finding a balance between providing high-quality patient care and managing costs effectively. Manufacturers are exploring cost-effective solutions to cater to various healthcare budgets.

### Global Supply Chain Disruptions

The COVID-19 pandemic exposed the vulnerabilities of global supply chains. Supply chain disruptions, whether due to a pandemic, natural disasters, or other unforeseen events, can impact the availability and delivery of patient positioning systems. Manufacturers are working on diversifying supply chain sources and ensuring robust contingency plans to mitigate such risks.

### Healthcare Inequalities

Disparities in healthcare access and resources present a challenge for the patient positioning systems market. Developing regions may lack the financial means and infrastructure to invest in advanced medical equipment. Addressing these healthcare inequalities requires collaborative efforts between governments, non-profit organizations, and manufacturers to make these systems accessible to underserved



populations.

## Key Market Trends

### Integration with Health Information Systems

Patient positioning systems are increasingly being integrated with electronic health records (EHRs) and health information systems. This integration allows for seamless data sharing and real-time monitoring of patient positioning during procedures. It enhances patient safety, reduces documentation errors, and improves the efficiency of healthcare operations.

### Portable and Modular Systems

Mobility and flexibility have become essential features in healthcare equipment. Portable and modular patient positioning systems are gaining traction as they offer versatility and adaptability in various clinical settings. These systems enable healthcare professionals to provide high-quality care to patients in different environments, including emergency situations and remote healthcare services.

### Focus on Infection Control

Infection control and prevention are at the forefront of healthcare considerations. Patient positioning systems are being designed with features that are easy to clean and disinfect. Manufacturers are increasingly using materials that are resistant to pathogens, ensuring that the systems comply with stringent hygiene standards.

## Segmental Insights

### Product Insights

Based on the category of Product, the tables category emerged as the dominant force in the market during 2023, attributed to heightened demand and an increasing number of facilities, including hospitals, ambulatory centers, specialty centers, and diagnostic facilities. This segment is poised to maintain its market leadership throughout the projected period, fueled by the growing need for precise and efficient diagnostic imaging, which creates opportunities for its expansion.

Conversely, the accessories sector is anticipated to experience the most rapid CAGR in

the market. This growth can be attributed to the escalating number of patients undergoing diverse medical procedures and diagnostic processes. Developing nations like India and China are witnessing a rising demand for diagnostic services, which is likely to drive sales of patient positioning systems in the foreseeable future. Key players in this field, such as Hill-Rom Services, Inc. and STERIS, among others, offer a range of accessories to meet market demands.

### Application Insights

In 2023, the surgery sector dominated, primarily due to the rising prevalence of chronic illnesses such as cancer. Moreover, the global surge in healthcare spending is expected to further bolster the growth of this field. Additionally, the increasing number of surgical procedures and advancements in technology are poised to stimulate market expansion.

Conversely, the diagnostics sector is projected to experience substantial growth throughout the forecast period. This can be attributed to the increasing worldwide investment in diagnostic and imaging services. Diagnostic tests currently account for more than 3.0% of the total healthcare expenditure and play a pivotal role in a physician's decision-making process. Almost all cancer diagnoses rely on laboratory tests and their outcomes. Furthermore, the surging demand for diagnosing chronic diseases and the rising elderly population are anticipated to drive the demand for diagnostics, thereby supporting market growth.

### Regional Insights

In 2023, North America secured a prominent position in the market, primarily due to the escalating incidence of chronic and lifestyle-related illnesses and the presence of advanced healthcare infrastructure. Furthermore, the strong presence of key market players such as Hill-Rom Holdings, Inc.; Stryker Corporation; Medline Industries; Skytron, LLC; and SchureMed in the United States is anticipated to fuel the growth of the patient positioning systems market in North America.

Europe is also projected to maintain the second-largest market share throughout the forecast period. This is attributed to the thriving medical device industry in countries like the UK, France, and Germany, along with increasing opportunities for market participants in this region.

Meanwhile, Asia Pacific is set to register the most rapid CAGR when compared to other regions over the forecast period. This can be attributed to the growing aging population



and healthcare expenditure in this area. For instance, the Asian Development Bank predicts that the elderly population in Asia will reach around 923 million by 2050. This demographic shift is expected to open up additional opportunities for the development of this market.

### Key Market Players

Medtronic PLC

Hill-Rom Holdings Inc

Stryker Corp

Medline Industries Inc

Skytron LLC

Smith & Nephew PLC

STERIS PLC

Mizuho Orthopedic Systems Inc

Leoni AG

OPT SURGISYSTEMS SRL

### Report Scope:

In this report, the Global Patient Positioning Systems Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Patient Positioning Systems Market, By Product:

Tables

Accessories

Patient Positioning Systems Market, By Application:

Surgery

Diagnostics

Others

Patient Positioning Systems Market, By End Use:

Hospitals

Ambulatory centers

Others

Patient Positioning Systems Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Patient Positioning Systems Market.

Available Customizations:

Global Patient Positioning Systems market report with the given market data, Tech Sci

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Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

Detailed analysis and profiling of additional market players (up to five).

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