

Middle East & Africa CT Scanner Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/M1C2550B2D72EN.html>

Date: April 2026

Pages: 215

Price: US\$ 3,450.00 (Single User License)

ID: M1C2550B2D72EN

Abstracts

The Middle East and Africa (MEA) CT Scanner Market is projected to grow significantly, with an expected market size of approximately US\$ 464.1 million by 2031, up from US\$ 359.0 million in 2024. This growth translates to a compound annual growth rate (CAGR) of 3.8% from 2025 to 2031, indicating a steady increase in demand for CT scanning technologies in the region.

Executive Summary and Market Analysis

The MEA region presents a diverse landscape for the CT scanner market, characterized by both challenges and opportunities. The modernization of health systems, an increasing burden of diseases, and enhanced access to advanced medical technologies are key drivers of market growth. High-income countries such as Saudi Arabia, the United Arab Emirates (UAE), and Qatar are making substantial investments in healthcare infrastructure as part of their national transformation initiatives. These programs aim to upgrade diagnostic capabilities, particularly through the adoption of high-slice CT systems and artificial intelligence (AI)-enabled platforms.

Strategic partnerships with global vendors, foreign direct investments, and collaborations between public and private sectors are pivotal in supporting these healthcare advancements. Additionally, the rise of medical tourism in certain Middle Eastern countries is contributing to the demand for high-quality imaging services and advanced diagnostic equipment, particularly in private healthcare facilities.

In Africa, while the CT scanner market is less developed, growth is being fueled by public health campaigns, increased donor funding, and the expansion of urban healthcare networks. The prevalence of non-communicable diseases, including cancer

and cardiovascular disorders, alongside trauma and infectious diseases, is driving the need for CT imaging in both primary and tertiary care settings. The popularity of mobile and mid-tier CT units is on the rise due to their cost-effectiveness and operational flexibility, making advanced imaging more accessible.

Financing models such as leasing and service-based contracts are emerging as solutions to address capital expenditure constraints, especially in lower-income markets. However, the region faces significant challenges, including a shortage of trained personnel, import restrictions, maintenance issues, and delays in regulatory approvals. To mitigate these challenges, vendors are increasingly implementing training programs and localized service models.

Market Segmentation Analysis

The Middle East and Africa CT Scanner Market can be segmented based on various criteria:

By Type: The market is divided into Stationary CT Scanners and Portable CT Scanners, with Stationary CT Scanners holding the largest market share in 2024.

By Architecture: The segmentation includes C-arm CT Scanners and O-arm CT Scanners, where C-arm CT Scanners dominated the market in 2024.

By Technology: The market is categorized into High Slice CT, Mid-size CT, Low Slice CT, and Cone Beam CT, with High Slice CT leading the market.

By Application: The applications include Neurology, Oncology, Orthopedics, and others, with Neurology being the most significant segment in 2024.

By End User: The end users are Hospitals, Diagnostic Centers, Veterinary Clinics, and Research Labs, with Hospitals being the primary users of CT scanners in 2024.

Market Outlook

The global increase in chronic and non-communicable diseases is a major driver for the CT scanner market. Conditions such as cardiovascular diseases, cancer, strokes, and

neurological disorders are becoming more prevalent due to factors like aging populations, sedentary lifestyles, urbanization, and poor dietary habits. These conditions necessitate advanced diagnostic imaging for early detection, precise localization, and effective treatment planning, where CT scans play a crucial role.

CT scans are favored for their ability to provide high-resolution, cross-sectional images quickly and non-invasively, making them essential in various diagnostic workflows, including emergency, outpatient, and inpatient settings. In oncology, for example, CT scans are extensively used for tumor staging and monitoring treatment responses, while in cardiology, they assist in calcium scoring and assessing coronary artery disease.

As populations in both developed and emerging economies age, the demand for diagnostic imaging, particularly CT technology, is expected to rise sharply. The ongoing trend of chronic diseases sustains a baseline demand for CT scanners and compels healthcare systems to upgrade their existing equipment to newer technologies that offer faster scans, reduced radiation exposure, and improved diagnostic accuracy.

Country Insights

The CT scanner market in the MEA region is further segmented by country, including Saudi Arabia, South Africa, the UAE, and the Rest of Middle East & Africa. South Africa is noted to hold the largest market share in 2024.

In South Africa, the CT scanner market operates within a dual healthcare system, comprising a well-developed private sector and a resource-constrained public sector. The private healthcare market drives demand for advanced CT imaging technologies, supported by higher healthcare spending and patient affordability. Conversely, the public sector focuses on expanding access to diagnostics through government-funded initiatives, often prioritizing mid-range and refurbished CT systems due to budget constraints. The increasing burden of non-communicable diseases is stimulating demand for timely and accurate imaging solutions.

Despite challenges such as disparities in access between urban and rural areas, infrastructure limitations, and a shortage of trained radiologists, ongoing public health reforms and private sector growth present significant opportunities for market expansion. The adoption of digital health solutions, mobile imaging technologies, and enhanced collaboration between manufacturers and healthcare providers are expected to drive future growth in the MEA CT scanner market.

Company Profiles

Key players in the Middle East and Africa CT Scanner Market include Medtronic Plc, Koninklijke Philips NV, GE HealthCare Technologies Inc, PLANMED OY, Canon Medical Systems Corp, Accuray Incorporated, Neusoft Medical Systems, Siemens Healthineers AG, Hitachi High-Tech Corp, and Shanghai United Imaging Healthcare Co., LTD. These companies are pursuing various strategies such as market expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase market share.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. CT SCANNER MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 Manufacturers/OEMs
 - 4.3.2 Distribution and Channel Partners
 - 4.3.3 Regulatory Bodies and Certification
 - 4.3.4 End Users
 - 4.3.5 List of Vendors in the Value Chain

5. MIDDLE EAST & AFRICA CT SCANNER MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends

5.5 Impact of Drivers and Restraints:

6. CT SCANNER MARKET - MIDDLE EAST & AFRICA MARKET ANALYSIS

6.1 Middle East & Africa CT Scanner Market Revenue (US\$ Million), 2024 - 2031

6.2 Middle East & Africa CT Scanner Market Forecast and Analysis

7. MIDDLE EAST & AFRICA CT SCANNER MARKET REVENUE ANALYSIS - BY TYPE

7.1 Stationary CT Scanners

7.1.1 Overview

7.1.2 Stationary CT Scanners: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Portable CT Scanners

7.2.1 Overview

7.2.2 Portable CT Scanners: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. MIDDLE EAST & AFRICA CT SCANNER MARKET REVENUE ANALYSIS - BY ARCHITECTURE

8.1 C-arm CT Scanners

8.1.1 Overview

8.1.2 C-arm CT Scanners: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 O-arm CT Scanners

8.2.1 Overview

8.2.2 O-arm CT Scanners: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. MIDDLE EAST & AFRICA CT SCANNER MARKET REVENUE ANALYSIS - BY TECHNOLOGY

9.1 High Slice CT

9.1.1 Overview

9.1.2 High Slice CT: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Mid size CT

9.2.1 Overview

9.2.2 Mid size CT: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3 Low Slice CT

9.3.1 Overview

9.3.2 Low Slice CT: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4 Cone Beam CT

9.4.1 Overview

9.4.2 Cone Beam CT: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. MIDDLE EAST & AFRICA CT SCANNER MARKET REVENUE ANALYSIS - BY APPLICATION

10.1 Neurology

10.1.1 Overview

10.1.2 Neurology: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.2 Oncology

10.2.1 Overview

10.2.2 Oncology: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.3 Orthopedics

10.3.1 Overview

10.3.2 Orthopedics: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.4 Others

10.4.1 Overview

10.4.2 Others: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11. MIDDLE EAST & AFRICA CT SCANNER MARKET REVENUE ANALYSIS - BY END USER

11.1 Hospitals

11.1.1 Overview

11.1.2 Hospitals: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.2 Diagnostic Centers

11.2.1 Overview

11.2.2 Diagnostic Centers: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.3 Veterinary Clinics

11.3.1 Overview

11.3.2 Veterinary Clinics: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.4 Research Lab

11.4.1 Overview

11.4.2 Research Lab: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

12. MIDDLE EAST & AFRICA CT SCANNER MARKET - COUNTRY ANALYSIS

12.1 Middle East & Africa

12.1.1 Middle East & Africa CT Scanner Market Revenue and Forecast and Analysis - by Country

12.1.1.1 Middle East & Africa CT Scanner Market Revenue and Forecast and Analysis - by Country

12.1.2.2 Saudi Arabia: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

12.1.2.2.1 Saudi Arabia: Middle East & Africa CT Scanner Market Share - by Type

12.1.2.2.2 Saudi Arabia: Middle East & Africa CT Scanner Market Share - by Architecture

12.1.2.2.3 Saudi Arabia: Middle East & Africa CT Scanner Market Share - by Technology

12.1.2.2.4 Saudi Arabia: Middle East & Africa CT Scanner Market Share - by Application

12.1.2.2.5 Saudi Arabia: Middle East & Africa CT Scanner Market Share - by End User

12.2.3.3 South Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

12.2.3.3.1 South Africa: Middle East & Africa CT Scanner Market Share - by Type

12.2.3.3.2 South Africa: Middle East & Africa CT Scanner Market Share - by Architecture

12.2.3.3.3 South Africa: Middle East & Africa CT Scanner Market Share - by Technology

12.2.3.3.4 South Africa: Middle East & Africa CT Scanner Market Share - by

Application

12.2.3.3.5 South Africa: Middle East & Africa CT Scanner Market Share - by End User

12.3.4.4 United Arab Emirates: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

12.3.4.4.1 United Arab Emirates: Middle East & Africa CT Scanner Market Share - by Type

12.3.4.4.2 United Arab Emirates: Middle East & Africa CT Scanner Market Share - by Architecture

12.3.4.4.3 United Arab Emirates: Middle East & Africa CT Scanner Market Share - by Technology

12.3.4.4.4 United Arab Emirates: Middle East & Africa CT Scanner Market Share - by Application

12.3.4.4.5 United Arab Emirates: Middle East & Africa CT Scanner Market Share - by End User

12.4.5.5 Rest of Middle East & Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

12.4.5.5.1 Rest of Middle East & Africa: Middle East & Africa CT Scanner Market Share - by Type

12.4.5.5.2 Rest of Middle East & Africa: Middle East & Africa CT Scanner Market Share - by Architecture

12.4.5.5.3 Rest of Middle East & Africa: Middle East & Africa CT Scanner Market Share - by Technology

12.4.5.5.4 Rest of Middle East & Africa: Middle East & Africa CT Scanner Market Share - by Application

12.4.5.5.5 Rest of Middle East & Africa: Middle East & Africa CT Scanner Market Share - by End User

13 COMPETITIVE LANDSCAPE

13.1 Heat Map Analysis by Key Players

13.2 Company Market Share Analysis, 2024

14 INDUSTRY LANDSCAPE

14.1 Overview

14.2 New Product Development

14.3 Merger and Acquisition

14.4 Other Strategic Developments

15 COMPANY PROFILES

15.1 Medtronic Plc

- 15.1.1 Key Facts
- 15.1.2 Business Description
- 15.1.3 Products and Services
- 15.1.4 Financial Overview
- 15.1.5 SWOT Analysis
- 15.1.6 Key Developments

15.2 Koninklijke Philips NV

- 15.2.1 Key Facts
- 15.2.2 Business Description
- 15.2.3 Products and Services
- 15.2.4 Financial Overview
- 15.2.5 SWOT Analysis
- 15.2.6 Key Developments

15.3 GE HealthCare Technologies Inc

- 15.3.1 Key Facts
- 15.3.2 Business Description
- 15.3.3 Products and Services
- 15.3.4 Financial Overview
- 15.3.5 SWOT Analysis
- 15.3.6 Key Developments

15.4 PLANMED OY

- 15.4.1 Key Facts
- 15.4.2 Business Description
- 15.4.3 Products and Services
- 15.4.4 Financial Overview
- 15.4.5 SWOT Analysis
- 15.4.6 Key Developments

15.5 Canon Medical Systems Corp

- 15.5.1 Key Facts
- 15.5.2 Business Description
- 15.5.3 Products and Services
- 15.5.4 Financial Overview
- 15.5.5 SWOT Analysis
- 15.5.6 Key Developments

15.6 Accuray Incorporated

- 15.6.1 Key Facts
- 15.6.2 Business Description
- 15.6.3 Products and Services
- 15.6.4 Financial Overview
- 15.6.5 SWOT Analysis
- 15.6.6 Key Developments
- 15.7 Neusoft Medical Systems
 - 15.7.1 Key Facts
 - 15.7.2 Business Description
 - 15.7.3 Products and Services
 - 15.7.4 Financial Overview
 - 15.7.5 SWOT Analysis
 - 15.7.6 Key Developments
- 15.8 Siemens Healthineers AG
 - 15.8.1 Key Facts
 - 15.8.2 Business Description
 - 15.8.3 Products and Services
 - 15.8.4 Financial Overview
 - 15.8.5 SWOT Analysis
 - 15.8.6 Key Developments
- 15.9 Hitachi High-Tech Corp
 - 15.9.1 Key Facts
 - 15.9.2 Business Description
 - 15.9.3 Products and Services
 - 15.9.4 Financial Overview
 - 15.9.5 SWOT Analysis
 - 15.9.6 Key Developments
- 15.10 Shanghai United Imaging Healthcare Co., LTD
 - 15.10.1 Key Facts
 - 15.10.2 Business Description
 - 15.10.3 Products and Services
 - 15.10.4 Financial Overview
 - 15.10.5 SWOT Analysis
 - 15.10.6 Key Developments

16. APPENDIX

- 16.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Middle East & Africa CT Scanner Market Segmentation

Table 2. List of Vendors

Table 3. Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 5. Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Architecture

Table 6. Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 7. Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 8. Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 9. Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 10. Saudi Arabia: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 11. Saudi Arabia: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Architecture

Table 12. Saudi Arabia: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 13. Saudi Arabia: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 14. Saudi Arabia: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 15. South Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 16. South Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Architecture

Table 17. South Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 18. South Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 19. South Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 20. United Arab Emirates: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 21. United Arab Emirates: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Architecture

Table 22. United Arab Emirates: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 23. United Arab Emirates: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 24. United Arab Emirates: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 25. Rest of Middle East & Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 26. Rest of Middle East & Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Architecture

Table 27. Rest of Middle East & Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 28. Rest of Middle East & Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 29. Rest of Middle East & Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 30. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. Middle East & Africa CT Scanner Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: CT Scanner Market

Figure 4. Middle East & Africa CT Scanner Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Middle East & Africa CT Scanner Market Revenue (US\$ Million), 2024 - 2031

Figure 7. Middle East & Africa CT Scanner Market Share (%) - by Type, 2024 and 2031

Figure 8. Stationary CT Scanners: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Portable CT Scanners: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. Middle East & Africa CT Scanner Market Share (%) - by Architecture, 2024 and 2031

Figure 11. C-arm CT Scanners: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. O-arm CT Scanners: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. Middle East & Africa CT Scanner Market Share (%) - by Technology, 2024 and 2031

Figure 14. High Slice CT: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 15. Mid size CT: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Low Slice CT: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. Cone Beam CT: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Middle East & Africa CT Scanner Market Share (%) - by Application, 2024 and 2031

Figure 19. Neurology: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Oncology: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. Orthopedics: Middle East & Africa CT Scanner Market - Revenue and

Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Others: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. Middle East & Africa CT Scanner Market Share (%) - by End User, 2024 and 2031

Figure 24. Hospitals: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Diagnostic Centers: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 26. Veterinary Clinics: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 27. Research Lab: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 28. Middle East & Africa CT Scanner Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 29. Saudi Arabia: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 30. South Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 31. United Arab Emirates: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 32. Rest of Middle East & Africa: Middle East & Africa CT Scanner Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 33. Company Market Share Analysis, 2024

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