

Cone Beam Imaging Market Report by Application (Implantology, Orthodontics, Oral Surgery, Endodontics, Periodontology, Orthopedics, ENT, and Others), Patient Position (Standing, Seating, Supine), Detector Type (Flat Panel Image Detector, Image Intensifier Type Detector), End User (Hospitals and Clinics, Diagnostic Centers, and Others), and Region 2024-2032

<https://marketpublishers.com/r/CD60A5D3C3BFEN.html>

Date: August 2024

Pages: 139

Price: US\$ 3,899.00 (Single User License)

ID: CD60A5D3C3BFEN

Abstracts

The global cone beam imaging market size reached US\$ 833.4 Million in 2023. Looking forward, IMARC Group expects the market to reach US\$ 1,732.1 Million by 2032, exhibiting a growth rate (CAGR) of 8.2% during 2024-2032. The increasing demand for dental applications, technological advancements enhancing imaging quality, the rising prevalence of dental disorders, and the growing adoption of cone beam computed tomography (CBCT) systems in various medical specialties are some of the key factors influencing the cone beam imaging market outlook.

Cone Beam Imaging Market Analysis:

Major Market Drivers: The increasing precise dental and orthopedic diagnostics support the cone beam imaging market growth, as it provides detailed three-dimensional (3D) imaging with lower radiation doses compared to traditional computed tomography (CT), crucial for effective treatment planning and surgical outcomes. Besides this, CBCT systems are becoming more useful in contemporary medical practices due to their increased diagnostic capabilities and adaptability, which is strengthening the market's growth.

Key Market Trends: The growing integration of artificial intelligence (AI) and machine learning (ML) in cone beam imaging systems, which automates and improves the accuracy of image analysis represents the key trend in the market. Additionally, significant improvements in healthcare infrastructure and increasing awareness of advanced diagnostic techniques are propelling the cone beam imaging market value.

Geographical Trends: The cone beam imaging market forecast revealed North America as the leading region due to its advanced healthcare infrastructure, high healthcare spending, and a strong focus on research and development (R&D). Besides this, Asia Pacific is experiencing fast growth, driven by increasing healthcare investments and expanding dental and orthopedic care sectors in countries such as China and India.

Competitive Landscape: Some of the major market players in the cone beam imaging industry include Asahi RoEntgen Ind. Co. Ltd., Carestream Health Inc., Cefla S.C., Curve Beam LLC, Danaher Corporation, Dentsply Sirona, J. Morita Mfg. Corp., Planmeca Group, Prexion Corporation, and Vatech Co. Ltd., among many others.

Challenges and Opportunities: Cone beam imaging market overview indicated that the expensive nature of CBCT systems poses a serious obstacle to market growth and may prevent smaller clinics from participating. However, this also presents an opportunity for manufacturers to innovate more cost-effective solutions that do not compromise on quality. Moreover, regulatory challenges, with CBCT systems classified as high-risk devices, is spurring the need for stringent compliance with international standards, thereby creating opportunities for companies to lead in regulatory excellence and build trust with healthcare providers and patients.

Cone Beam Imaging Market Trends:

Advancements in technology

Technological advancements have revolutionized diagnostic imaging. Innovations such as high-resolution imaging sensors, faster scanning capabilities, and advanced software algorithms have significantly enhanced image quality and diagnostic accuracy.

Additionally, developments in ergonomic patient positioning systems and radiation dose reduction techniques have improved patient comfort and safety during procedures. Integration with AI and ML algorithms further boosts diagnostic capabilities, enabling automated image analysis and interpretation. These technological strides elevate the efficiency and effectiveness of these imaging systems and expand their applications across numerous medical specialties, boosting cone beam imaging market revenue.

Adoption across medical specialties

While cone beam imaging was initially developed for dental applications such as orthodontics, implantology, and maxillofacial surgery, its utility has expanded to other fields, including otolaryngology, orthopedics, and interventional radiology. In otolaryngology, CBCT is used for sinus imaging and evaluating temporomandibular joint (TMJ) disorders. Moreover, patients seeking orthodontic treatment have a wide range of prevalence rates of temporomandibular joint disorder (TMD), from 21.1% to 73.3%, which is further boosting the market demand. Additionally, the increasing product utilization in interventional radiology for image-guided procedures such as biopsies and ablations is aiding in market expansion.

Rising prevalence of dental disorders

The escalating prevalence of dental issues is bolstering the demand for advanced diagnostic tools like cone beam imaging in dentistry. Globally, conditions like dental caries, periodontal diseases, and temporomandibular joint disorders are on the rise, highlighting the necessity for precise diagnostic imaging. Statistics reveal that over 90% of adults have experienced cavities, with up to 10% of children aged 2 to 5 left untreated. Adolescents aren't spared either, with over half experiencing cavities in their permanent teeth by age 19. This is prompting dental professionals to adopt cone beam imaging more frequently to improve diagnostic accuracy, treatment outcomes, and overall patient care as it offers three dimensions (3-D) visualization, precise measurements, and reduced radiation exposure.

Cone Beam Imaging Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on application, patient position, detector type, and end user.

Breakup by Application:

Implantology

Orthodontics

Oral Surgery

Endodontics

Periodontology

Orthopedics

ENT

Others

Implantology accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the application. This includes implantology, orthodontics, oral surgery, endodontics, periodontology, orthopedics, ENT, and others. According to the report, implantology represented the largest segment.

Cone beam imaging market research report shows that implantology stands out as the largest application segment since CBCT technology plays a crucial role in pre-operative planning and accurate dental implant placement. Concurrently, accurate imaging solutions are becoming more mandatory as the demand for dental implants rises as a result of aging populations and rising dental awareness. As implantology procedures become more sophisticated and patient expectations for successful outcomes rise, cone beam imaging emerges as an indispensable tool in ensuring optimal treatment planning and implant success rates.

Breakup by Patient Position:

Standing

Seating

Supine

Seating holds the largest share of the industry.

A detailed breakup and analysis of the market based on the patient position have also been provided in the report. This includes standing, seating, and supine. According to the report, seating accounted for the largest market share.

Seating solutions account for the largest cone beam imaging market share due to their critical role in ensuring precise patient positioning for optimal imaging outcomes. Cone beam imaging setups require seating systems in order to provide precise alignment and stability during imaging procedures. Seating solutions' ability to meet a wide range of patient needs and imaging requirements through advancements in ergonomic design and customization options is fostering market expansion. Furthermore, since seating solutions improve the overall imaging experience and lower the risk of motion products, the emphasis on patient comfort and safety further emphasizes the importance of these solutions.

Breakup by Detector Type:

Flat Panel Image Detector

Image Intensifier Type Detector

The report provided a detailed breakup and analysis of the market based on the detector type. This includes flat panel image and image intensifier type detectors.

Flat panel detectors are sought after for their superior image quality, reduced radiation exposure, and swift image processing, which collectively enhance diagnostic accuracy. It offers high-resolution images with minimal radiation; they optimize patient safety while delivering precise diagnostic insights. It exhibits the ability to process images to aid in timely diagnoses and treatment decisions, highlighting its significance in modern healthcare settings where accuracy and efficiency are paramount.

On the other hand, image intensifier-type detectors remain in demand due to their cost-

effectiveness and reliable performance in dynamic imaging scenarios. These detectors are adept at capturing real-time images, making them ideal for a wide range of clinical applications where rapid imaging is essential. Their affordability and consistent performance contribute to their continued relevance in medical settings, ensuring healthcare professionals can efficiently diagnose and treat patients across diverse scenarios.

Breakup by End User:

Hospitals and Clinics

Diagnostic Centers

Others

Hospitals and clinics exhibit a clear dominance in the market.

A detailed breakup and analysis of the market based on the end user have also been provided in the report. This includes hospitals and clinics, diagnostic centers, and others. According to the report, hospitals and clinics accounted for the largest market share.

The widespread product demand across hospital and clinic management systems propelled by the growing emphasis on patient-centric care and efficient administrative processes is boosting the demand for cone beam imaging systems. Additionally, the increasing complexity of healthcare regulations and compliance standards necessitating sophisticated software tools to ensure adherence and mitigate risks is contributing to the market growth. Moreover, the digital transformation sweeping through the healthcare industry has spurred the adoption of advanced imaging technologies. Furthermore, with the rise of personalized medicine and genomic advancements, there is a growing demand for management systems that can integrate genomic data seamlessly into patient records to support tailored treatment plans and precision medicine approaches.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America leads the market, accounting for the largest cone beam imaging market share

The 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 represents the largest regional market for cone beam imaging.

North America enjoys the leading position in the market owing to its robust healthcare infrastructure and a strong emphasis on advanced diagnostic methods. North America's leadership in medical technology innovation, coupled with substantial healthcare spending, supports the adoption of cutting-edge imaging technologies like cone beam computed tomography (CBCT). Moreover, there is a significant focus on R&D within the region, which fuels technological advancements in imaging systems, enhancing their capabilities and applications in both dental and orthopedic care. Moreover, the high prevalence of dental disorders and increasing orthopedic surgeries in the region necessitate detailed imaging for accurate diagnostics and treatment planning, further driving the demand for CBCT. Additionally, the presence of leading medical device manufacturers in North America who actively invest in and promote the latest imaging technologies ensures wide availability and continual improvements in cone beam imaging solutions.

Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the cone beam imaging industry include Asahi RoEntgen Ind. Co. Ltd., Carestream Health Inc., Cefla S.C., Curve Beam LLC, Danaher Corporation, Dentsply Sirona, J. Morita Mfg. Corp., Planmeca Group, Prexion Corporation, Vatech Co. Ltd, etc.

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

The competitive landscape of the global cone beam imaging market is characterized by the presence of several major players. These companies are engaged in intense competition and innovation to capture larger shares of a rapidly growing market. Each company brings distinct technological advancements and strategic initiatives, such as mergers, acquisitions, partnerships, and new product developments, to stay ahead. For instance, Dentsply Sirona and Planmeca Group are renowned for their innovation in digital dentistry, frequently updating their CBCT offerings to enhance image quality and user experience. The diversity in strategies and continual advancements in technology contribute to a dynamic market environment, pushing the boundaries of what CBCT systems can achieve in diagnostic imaging across various medical fields.

Cone Beam Imaging Market News:

In October 2023, PreXion, Inc. introduced the 3-in-1 PreXion3D Evolve CBCT, PAN, and CEPH, as well as the Evolve Sensor intraoral dental digital imaging sensor, to expand its already extensive line of dental imaging products.

In September 2023, Dentsply Sirona revealed a new tool for SureSmile users as well as updates to its cloud-based platform, DS Core. DENTSPLY Sirona's cloud-based platform, DS Core, helps dentists from the time an image is captured until the patient is being treated.

In March 2023, Planmeca OY launched the Planmeca Viso G3 imaging unit at the International Dental Show 2023. The Planmeca Viso G3 imaging unit offers premium imaging of the whole dentition to dental practitioners around the world and comes with the full benefits of Viso technology.

Key Questions Answered in This Report

1. What was the size of the global cone beam imaging market in 2023?
2. What is the expected growth rate of the global cone beam imaging market during

2024-2032?

3. What has been the impact of COVID-19 on the global cone beam imaging market?
4. What are the key factors driving the global cone beam imaging market?
5. What is the breakup of the global cone beam imaging market based on application?
6. What is the breakup of the global cone beam imaging market based on the patient position?
7. What is the breakup of the global cone beam imaging market based on the end user?
8. What are the key regions in the global cone beam imaging market?
9. Who are the key players/companies in the global cone beam imaging market?

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