

Diagnostic Imaging Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product Type (X-Ray, Ultrasound, Computed Tomography, Nuclear Imaging, and Magnetic Resonance Imaging), By Application (Oncology, Neurology, Cardiology, Gynecology, Orthopedics, and Others), By End User (Hospitals, Diagnostic Imaging Centers, and Ambulatory Imaging Centers), By Region and Competition

<https://marketpublishers.com/r/D6A593F88820EN.html>

Date: October 2023

Pages: 182

Price: US\$ 4,900.00 (Single User License)

ID: D6A593F88820EN

Abstracts

In 2022, the Global Diagnostic Imaging Market reached a valuation of USD 25.09 billion, and it is poised for remarkable growth in the forecast period with a projected Compound Annual Growth Rate (CAGR) of 5.53% through 2028.

Diagnostic imaging comprises a diverse array of techniques utilized to visualize the human body, serving as a vital tool in the diagnosis, monitoring, and treatment of medical conditions. Each imaging modality offers distinct insights into the targeted body part, including the detection of diseases, injuries, or the assessment of the effectiveness of medical interventions. These non-invasive methods for capturing internal body structures, collectively referred to as diagnostic imaging, encompass technologies such as X-rays, magnetic resonance imaging (MRI), computed tomography (CT), prenatal diagnostics, and other specialized modalities.

Healthcare professionals harness the power of diagnostic imaging to establish precise diagnoses and conduct comprehensive patient assessments. Moreover, this technology plays a crucial role in closely monitoring a patient's response to treatment regimens and

medications. Diagnostic imaging encompasses a wide range of procedures, enabling healthcare providers to gain valuable visual insights into the body's internal structures, ultimately aiding in the accurate identification of the root causes of health issues or injuries.

Key Market Drivers

Rise in the Prevalence of Chronic Diseases

The rise in the prevalence of chronic diseases is expected to significantly increase the demand for diagnostic imaging in the future. This upward trend is driven by several interconnected factors that underscore the critical role of imaging technologies in the diagnosis and management of chronic health conditions.

Chronic diseases, such as cardiovascular disease, cancer, diabetes, and respiratory disorders, are becoming increasingly common worldwide due to factors like aging populations, sedentary lifestyles, and dietary habits. These conditions often require precise and early diagnosis to initiate effective treatments and improve patient outcomes. Diagnostic imaging techniques like X-rays, CT scans, MRIs, and ultrasound play a pivotal role in detecting and monitoring these diseases, allowing healthcare providers to make informed decisions about patient care. Diagnostic imaging helps tailor treatment plans to individual patient needs, allowing for more effective and less invasive interventions. For example, cancer imaging techniques help oncologists precisely locate tumors, assess their stage, and monitor treatment response, all of which contribute to better treatment outcomes.

Increased Adoption of Advanced Technologies in Diagnostic imaging

The increased adoption of advanced technologies in diagnostic imaging is poised to significantly boost the demand for diagnostic imaging in the future. This trend is driven by a convergence of factors that underscore the pivotal role of cutting-edge technologies in enhancing healthcare diagnostics and patient care. One of the key drivers of this demand is the continuous development and integration of artificial intelligence (AI) and machine learning algorithms into diagnostic imaging processes. These AI-driven systems have the potential to expedite and improve the accuracy of image analysis, aiding healthcare professionals in early disease detection, diagnosis, and treatment planning. AI can assist in identifying subtle patterns or abnormalities in medical images, making the diagnostic process more efficient and effective.

Furthermore, the advent of 3D and 4D imaging techniques, such as 3D mammography and 4D fetal ultrasound, has revolutionized the field of diagnostic imaging. These technologies provide more detailed and dynamic views of anatomical structures and physiological processes, offering clinicians invaluable insights for diagnosis and treatment. The demand for these advanced imaging modalities is expected to increase as they become more accessible and affordable. The increased adoption of advanced technologies in diagnostic imaging promises to revolutionize the field by enhancing diagnostic accuracy, accessibility, and convenience. As these technologies become more widespread and integrated into healthcare systems, the demand for diagnostic imaging is expected to rise, ultimately leading to improved patient care and outcomes in the future.

Increase in the Geriatric Population

The increase in the geriatric population is expected to significantly drive up the demand for diagnostic imaging in the future. This demographic shift is driven by longer life expectancies and declining birth rates, resulting in a growing elderly population worldwide. The aging process brings with it a higher likelihood of developing various chronic diseases and age-related conditions, which necessitate increased diagnostic imaging services.

As individuals age, their risk of developing chronic illnesses such as cardiovascular disease, cancer, osteoarthritis, and neurological disorders rises. Diagnostic imaging plays a crucial role in early detection, disease monitoring, and treatment planning for these conditions. Regular screenings and imaging tests are essential for managing the health of the elderly population effectively. Older adults often present with complex medical conditions that require a multidisciplinary approach to diagnosis and treatment. Advanced imaging technologies like MRI, CT scans, and PET scans provide detailed and comprehensive insights into these conditions, aiding healthcare providers in making accurate diagnoses and tailoring treatments to individual patients.

The growing geriatric population is a significant driver of increased demand for diagnostic imaging in the future. As the elderly population continues to expand, healthcare systems must be prepared to meet the rising need for advanced imaging services to facilitate early diagnosis, enhance treatment outcomes, and improve the overall quality of care for older adults.

Introduction of Technologically Advanced Systems

The demand for diagnostic imaging equipment is projected to experience significant growth due to factors such as the increasing need for early and cost-effective diagnoses of chronic diseases and the aging global population. Two key drivers influencing market growth are the introduction of technologically advanced devices and the expansion of the healthcare industry in Asian countries. For example, Fujifilm Corporation introduced a new Artificial Intelligence (AI)-based lung nodule detection technology in May 2020. This technology aids in the diagnosis of lung cancer by detecting pulmonary nodules in chest CT scans.

Furthermore, in November 2020, Canon Medical Systems Corporation introduced the One-Beat Spectral Cardiac CT, which enables the capture of whole-heart spectral images in a single heartbeat. This technology incorporates quick kVp switching and deep learning spectral reconstruction. The introduction of various innovative products is expected to drive demand and contribute to the market's growth.

Key Market Challenges

Expensive Procedures and Equipment

The demand for diagnostic imaging is being hindered by the cost associated with expensive procedures and equipment, posing significant challenges for healthcare systems, providers, and patients alike. The high cost of acquiring and maintaining advanced imaging equipment, such as MRI machines, CT scanners, and PET scanners, places a considerable financial burden on healthcare institutions. These institutions often pass these costs onto patients through increased charges for imaging services, making them less accessible for individuals without adequate insurance coverage or financial means. The complexity of certain imaging procedures necessitates specialized training for technicians and radiologists, which can increase labor costs. The scarcity of qualified personnel in some regions further exacerbates this issue, leading to longer wait times for imaging appointments and delayed diagnoses.

The high costs associated with diagnostic imaging procedures and equipment are hindering their demand, potentially limiting access to crucial medical diagnostics for many patients. Addressing this challenge requires innovative approaches, such as public-private partnerships, research into cost-effective imaging technologies, and improved insurance coverage, to ensure that patients can access the diagnostic imaging services they need without undue financial hardship. This is essential for both timely and accurate diagnoses and the overall improvement of healthcare outcomes.

Recurring Expense of Maintaining and Upgrading Imaging Equipment

Another factor is the recurring expense of maintaining and upgrading imaging equipment to ensure its accuracy and compliance with evolving healthcare standards. Diagnostic imaging equipment, such as MRI machines, CT scanners, and ultrasound devices, require regular maintenance to ensure their proper functionality and accuracy. Routine servicing, calibration, and repairs are necessary to maintain image quality and reliability. The cost of maintaining a fleet of sophisticated imaging devices can be substantial, draining financial resources from healthcare facilities.

These ongoing costs can make healthcare institutions hesitant to invest in new imaging technologies and may limit the accessibility of state-of-the-art imaging services to certain regions or facilities. The financial constraints imposed by the recurring costs of maintaining and upgrading imaging equipment can lead to several adverse consequences, including longer waiting times for imaging appointments, limited access to cutting-edge diagnostic technologies, and potentially higher costs for patients as healthcare providers seek to recoup their expenses.

Key Market Trends

Point-of-Care Imaging

The development of smaller, portable, and point-of-care imaging devices is making diagnostic imaging more accessible in emergency situations, ambulances, and remote areas, reducing the need for centralized imaging facilities. In emergency situations, such as trauma cases or stroke incidents, timely diagnosis is critical for patient outcomes. Portable imaging devices allow medical professionals to quickly assess injuries, internal bleeding, or neurological conditions on-site, facilitating rapid decision-making regarding treatment options. Equipping ambulances with portable imaging devices enables paramedics and emergency medical personnel to perform preliminary scans and diagnostics while en route to the hospital. This real-time information can help hospitals prepare for incoming patients and initiate appropriate interventions upon arrival.

In remote or underserved areas with limited access to centralized healthcare facilities, portable imaging devices bring diagnostic capabilities to the patient's location. This is particularly important for communities that would otherwise face challenges in receiving timely and comprehensive medical care.

Advanced Imaging Modalities

Continuous advancements in imaging modalities, such as positron emission tomography (PET)-MRI and hybrid imaging technologies, offer more comprehensive and detailed information for improved diagnosis. PET-MRI combines the functional and metabolic information from PET scans with the detailed anatomical information from MRI scans. This simultaneous imaging provides a holistic view of the body's structures and functions in a single scan, allowing for more accurate and comprehensive assessments. Traditional PET-CT scans are limited in their ability to distinguish between different soft tissues. PET-MRI, on the other hand, excels in soft tissue contrast and can detect subtle abnormalities in organs like the brain, liver, and prostate, making it invaluable in oncology and neurology.

PET-MRI reduces radiation exposure compared to PET-CT, making it particularly advantageous for pediatric patients and individuals requiring multiple scans over time. The lower radiation dose also minimizes potential long-term risks associated with radiation exposure.

Segmental Insights

Product Type Insights

Based on the product type, the market is segmented into X-ray imaging systems, computed tomography (CT) scanners, ultrasound imaging systems, magnetic resonance imaging (MRI) systems, and nuclear imaging systems. X-ray imaging systems lead the diagnostic imaging market owing to their low cost and the ability to produce accurate images that provide a clear idea of the musculoskeletal system. This is particularly beneficial for diagnosing fractures, bone diseases, and joint abnormalities.

The growth of the X-ray imaging systems segment is further supported by the increasing demand for mobile X-ray systems, which allow for convenient imaging in various healthcare settings. Additionally, the expanding number of hospitals and diagnostic centres, especially in emerging countries, contributes to the growth of this market segment. The advancements in digital technology have also improved the quality and efficiency of X-ray imaging, making it a preferred choice for many healthcare professionals. Another factor driving the growth of X-ray imaging systems is the painless and non-invasive nature of the procedures. Patients find X-ray examinations relatively comfortable and quick, which leads to improved patient satisfaction. Moreover, X-rays are generally more affordable compared to other modalities such as MRI and CT

scanners, making them more accessible for healthcare facilities with budget constraints. Overall, the continued advancements in X-ray technology, coupled with its cost-effectiveness and diagnostic accuracy, contribute to the dominance of X-ray imaging systems in the diagnostic imaging market.

End User Insights

Based on the end user, the market is segmented into hospitals, diagnostic imaging centers, and Ambulatory Imaging Centres. Currently, hospitals comprise the largest share. However, the adoption of imaging systems by diagnostic centers is expected to grow at the highest compound annual growth rate (CAGR) during the forecast period. This can be attributed to several factors, including the increasing number of private imaging centers fueled by the rising demand for diagnostic imaging procedures. The growth of this end user segment is expected to be driven by the need for accurate and timely diagnosis, as well as the advancements in imaging technology that enable better visualization and improved patient outcomes. With the increasing focus on early detection and prevention of diseases, the role of diagnostic imaging centers in delivering high-quality healthcare services is becoming increasingly important.

Regional Insights

In 2022, North America emerged as the dominant player in the medical/diagnostic imaging market, capturing a major share. With a well-established healthcare infrastructure and the presence of key players for medical imaging outsourcing, the region is poised to maintain its dominance in the global medical imaging market during the forecast period. This can be attributed to the increasing prevalence of chronic diseases, which has led to a growing demand for advanced diagnostic imaging technologies.

On the other hand, Asia-Pacific is projected to exhibit the highest compound annual growth rate (CAGR) from 2024 to 2028. This can be attributed to several factors, including the rapid increase in the number of hospitals, the rising demand for early diagnosis, and the growing prevalence of diseases such as cancer and cardiac ailments. Additionally, the region is experiencing a significant upsurge in the number of geriatric populations, further driving the demand for medical imaging services. Overall, these trends indicate a dynamic and evolving medical imaging market, with North America maintaining its stronghold and Asia-Pacific emerging as a key growth region in the coming years.

Key Market Players

GE Healthcare Inc.

Philips Healthcare Informatics Inc.

Hitachi Medical Corporation

Hologic, Inc.

Siemens Healthcare GmbH

Samsung Medison

Shimadzu Corporation

Toshiba Medical Systems Corporation

Esaote S.P.A

Fujifilm Corporation

Report Scope:

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

Diagnostic Imaging Market, By Product Type:

X-Ray

Ultrasound

Computed Tomography

Nuclear Imaging

Magnetic Resonance Imaging

Diagnostic Imaging Market, By Application:

Oncology

Neurology

Cardiology

Gynaecology

Orthopaedics

Others

Diagnostic Imaging Market, By End User:

Hospitals

Diagnostic Imaging Centres

Ambulatory Imaging Centres

Diagnostic Imaging Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Diagnostic Imaging Market.

Available Customizations:

Global Diagnostic Imaging market report with the given market data, Tech Sci 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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