

Saudi Arabia Ultrasound Devices Market By Product Type (Diagnostic Ultrasound Systems, Therapeutic Ultrasound), By Application (Radiology, Cardiology, Obstetrics & Gynecology, Gastroenterology, Urology, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Saudi Arabia Ultrasound Devices Market was valued at USD 357.62 Million in 2024 and is expected to reach USD 453.31 Million by 2030 with a CAGR of 4.23% during the forecast period. The Saudi Arabian ultrasound devices market is poised for significant growth, driven by technological advancements, increasing healthcare investments, and rising demand for non-invasive diagnostic solutions. Ultrasound imaging has become an essential diagnostic tool in the Kingdom's healthcare sector, particularly in obstetrics, cardiology, and musculoskeletal conditions. Siemens Healthineers has entered into a partnership with Dallah Health Company to manage the technology in the radiology department at Nakheel Hospital in Riyadh, Saudi Arabia. Under this agreement, Siemens Healthineers will oversee the installation, maintenance, upgrades, and replacement of medical imaging equipment, as well as provide training for the biomedical and clinical teams. Additionally, the collaboration will enhance clinical workflows and overall patient experience. This ensures that Nakheel Hospital remains at the forefront of technological advancements and is prepared for future innovations. As part of Saudi Arabia's broader healthcare transformation under Vision 2030, the market is expected to expand rapidly, providing opportunities for both domestic and international companies in the medical device industry.

One of the key drivers of the ultrasound devices market in Saudi Arabia is the increasing prevalence of chronic diseases, such as cardiovascular diseases, diabetes,

and cancer. These conditions require regular monitoring, making ultrasound a vital tool for early detection and disease management. In particular, ultrasound devices are widely used for imaging the heart, liver, kidneys, and other organs, providing detailed images that help healthcare professionals make more accurate diagnoses.

However, despite the promising growth prospects, the ultrasound devices market in Saudi Arabia faces several challenges. The high initial cost of advanced ultrasound systems can be a barrier, particularly for smaller healthcare providers and those in remote areas. Additionally, there is a need for specialized training to ensure that medical professionals are proficient in using the latest ultrasound technologies effectively. Addressing these challenges requires ongoing investments in training programs and financial support for healthcare facilities to ensure equitable access to advanced ultrasound solutions across the Kingdom.

Key Market Drivers

Growth in Healthcare Industry

The growth of the healthcare industry in Saudi Arabia is a significant driver of the country's ultrasound devices market. Saudi Arabia's health law is designed to ensure equitable and accessible healthcare for all individuals. Through the Ministry of Health (MoH), the country offers a comprehensive network of healthcare services across all regions. Citizens receive free healthcare at government medical facilities, supported by a newly implemented health strategy tailored to address the evolving needs of the healthcare sector. As the Kingdom invests heavily in healthcare infrastructure as part of its Vision 2030 initiative, there is a strong push to adopt advanced medical technologies to enhance diagnostic capabilities and improve patient outcomes. Ultrasound devices, known for their non-invasive nature and versatility, are increasingly being integrated into medical facilities across Saudi Arabia to meet the growing demand for efficient, real-time imaging solutions.

The rising number of healthcare facilities, coupled with a growing patient population, has created a substantial demand for advanced diagnostic equipment. Ultrasound devices are particularly sought after in the fields of obstetrics, cardiology, and musculoskeletal imaging, where accurate, timely, and non-invasive assessments are critical. Their ability to provide immediate results, combined with relatively lower operational costs compared to other imaging modalities, makes them an attractive option for healthcare providers looking to enhance service delivery.

Additionally, the expansion of specialized healthcare services, such as prenatal care, cancer diagnosis, and cardiology, has fueled the demand for ultrasound technology. As Saudi Arabia continues to modernize its healthcare system and address the needs of a growing and aging population, ultrasound devices are poised to play an increasingly central role in diagnostics. This growth in the healthcare industry, alongside rising healthcare awareness and demand for non-invasive diagnostic methods, is expected to continue driving the expansion of the ultrasound devices market in Saudi Arabia.

Surge in Technological Advancements

The surge in technological advancements is a key driver of the growth in Saudi Arabia's ultrasound devices market. With the continuous evolution of imaging technologies, ultrasound devices have become more advanced, offering higher resolution, greater accuracy, and enhanced capabilities for both diagnostic and therapeutic applications. In 2021, Abdul Latif Jameel Health collaborated with Butterfly Network to introduce the world's first handheld, single-probe, full-body ultrasound system to the MENA region. The device, named Butterfly iQ+, is a compact ultrasound solution composed of three components: a probe featuring patented on-chip digital micro-beaming technology and optimized power-efficient FPGA electronics, a compatible iOS or Android mobile device to which the probe connects, and the Butterfly iQ+ mobile application. These technological improvements are significantly reshaping the landscape of medical imaging in the Kingdom, contributing to the increased adoption of ultrasound systems across healthcare facilities.

One of the major technological advancements fueling this growth is the development of 3D and 4D ultrasound imaging. These innovations provide detailed, real-time images that allow healthcare professionals to better assess and diagnose a wide range of conditions, including cardiovascular diseases, cancer, and musculoskeletal disorders. The ability to visualize structures in three dimensions not only improves diagnostic accuracy but also aids in planning and monitoring treatments, further driving demand for these sophisticated ultrasound systems.

Another key advancement is the integration of portable and handheld ultrasound devices, which are revolutionizing patient care, particularly in remote or underserved areas. These compact, lightweight systems offer convenience, affordability, and mobility, enabling healthcare providers to perform diagnostics in diverse settings, from emergency rooms to rural clinics. As the healthcare sector in Saudi Arabia continues to prioritize accessibility and efficiency, the demand for portable ultrasound devices has been steadily increasing.

Key Market Challenges

High Initial Costs of Advanced Equipment

A significant challenge facing the ultrasound devices market in Saudi Arabia is the high initial cost associated with advanced ultrasound equipment. Despite the clear advantages that modern ultrasound systems offer, such as enhanced imaging quality, portability, and advanced diagnostic capabilities, the upfront financial investment required to procure these devices remains a substantial barrier for many healthcare providers in the Kingdom.

The cost of advanced ultrasound machines can be prohibitive, especially for smaller healthcare institutions, private clinics, and facilities located in rural or underserved areas. These devices often feature cutting-edge technology, such as 3D/4D imaging, Doppler ultrasound, and AI-assisted diagnostics, all of which come at a premium price. In addition to the base cost of the equipment, healthcare providers must also account for expenses related to installation, maintenance, and the purchase of consumables, which further increase the total financial commitment.

The high cost of ultrasound equipment can also be a deterrent for healthcare facilities when considering the adoption of the latest models. While the benefits of investing in newer ultrasound technology are clear—offering improved diagnostic accuracy and enhanced patient outcomes—the initial financial burden may lead some hospitals and clinics to delay or avoid upgrading their equipment. This issue is particularly acute in smaller or public healthcare settings, where budgets are more constrained and resources are often limited.

Key Market Trends

Rising Demand for Non-Invasive Diagnostic Procedures

The rising demand for non-invasive diagnostic procedures is a key trend driving the growth of Saudi Arabia's ultrasound devices market. Non-invasive prenatal testing (NIPT) for Down's, Patau's, and Edwards' syndromes is available as a screening tool. Key statistical metrics—sensitivity, specificity, and negative predictive value (NPV)—are essential for evaluating the performance of medical tests, including prenatal screenings. Sensitivity reflects the test's ability to accurately identify fetuses affected by a specific condition, while specificity indicates its effectiveness in correctly identifying fetuses

without the condition. As patients and healthcare providers increasingly prioritize minimally invasive methods that offer greater comfort, faster recovery times, and reduced risks, ultrasound devices have become a central tool in modern diagnostics. This trend aligns with Saudi Arabia's healthcare transformation goals under Vision 2030, which emphasize the adoption of advanced technologies that enhance patient care while minimizing the need for invasive procedures.

Ultrasound imaging, which relies on sound waves rather than radiation, is particularly valued for its ability to provide real-time, accurate diagnostic information without causing harm to the patient. Its applications span a wide range of medical specialties, including obstetrics, cardiology, musculoskeletal imaging, and oncology, where non-invasive diagnostics are critical for early detection and ongoing monitoring of conditions. The growing preference for non-invasive procedures is driving the increased adoption of ultrasound devices in both routine and specialized healthcare settings across the Kingdom.

Moreover, the expansion of outpatient care centers, private clinics, and diagnostic imaging centers in Saudi Arabia is further fueling the demand for ultrasound technology. As these facilities look to offer more patient-friendly diagnostic options, ultrasound devices are increasingly seen as an essential tool for providing efficient, accurate, and non-invasive assessments. As awareness of the benefits of non-invasive diagnostics continues to rise, the ultrasound devices market in Saudi Arabia is expected to experience sustained growth, reflecting both shifting patient preferences and the country's commitment to improving healthcare accessibility and quality.

Segmental Insights

Product Type Insights

Based on Product Type, Diagnostic Ultrasound Systems have emerged as the fastest growing segment in the Saudi Arabia Ultrasound Devices Market in 2024. One key driver of this growth is the continuous technological advancements in diagnostic ultrasound systems, including the development of high-definition imaging, 3D and 4D imaging capabilities, and the integration of artificial intelligence (AI). These innovations have significantly enhanced the diagnostic accuracy of ultrasound systems, enabling healthcare professionals to detect and assess medical conditions with greater precision. The ability to produce detailed, real-time images is especially beneficial in early detection, leading to better treatment planning and patient outcomes.

Additionally, the growing focus on non-invasive diagnostic methods has further fueled the adoption of diagnostic ultrasound systems. Ultrasound is widely preferred over more invasive techniques due to its safety, minimal discomfort for patients, and lower associated costs. These factors have made diagnostic ultrasound systems increasingly attractive to healthcare providers who aim to provide efficient, patient-centered care while controlling costs.

Application Insights

Based on Application, Radiology have emerged as the fastest growing segment in the Saudi Arabia Ultrasound Devices Market during the forecast period. As the prevalence of chronic diseases, such as cancer, cardiovascular conditions, and musculoskeletal disorders, continues to rise in Saudi Arabia, there has been a growing demand for advanced diagnostic imaging technologies. Radiology departments, which heavily rely on ultrasound devices for non-invasive diagnostic procedures, are at the forefront of this growth. Ultrasound's ability to provide real-time, detailed images makes it an essential tool in radiology, fueling its expansion in the market.

Ultrasound imaging offers a non-invasive alternative to more costly and resource-intensive imaging modalities such as MRI and CT scans. As healthcare providers seek cost-effective diagnostic solutions without compromising patient care, ultrasound has become increasingly preferred in radiology. Its affordability and minimal patient discomfort have made it a go-to option for radiologists across Saudi Arabia, driving its adoption in the radiology segment.

Regional Insights

Based on Region, Northern & Central have emerged as the dominating region in the Saudi Arabia Ultrasound Devices Market in 2024. The Northern and Central regions of Saudi Arabia, particularly cities like Riyadh and Jeddah, house a high concentration of hospitals, diagnostic centers, and specialized healthcare facilities. These urban centers are home to some of the country's most advanced medical institutions, where the demand for cutting-edge medical technologies, including ultrasound devices, is particularly strong. The availability of state-of-the-art diagnostic tools in these regions has positioned them as leaders in the adoption of ultrasound technology.

The Saudi government's ongoing healthcare reforms under Vision 2030 have prioritized the expansion and modernization of healthcare infrastructure in key regions, including the Northern and Central areas. With an emphasis on improving healthcare access,

quality, and availability, these regions have benefited from significant investments in medical equipment and facilities, driving the growth of the ultrasound devices market. The government's initiatives to enhance diagnostic capabilities in major cities have further propelled the adoption of ultrasound devices in the region.

Key Market Players

GE HealthCare Technologies Inc.

Siemens Ltd.

Koninklijke Philips N.V.

FUJIFILM Corporation

Philips Healthcare Saudi Arabia Ltd

Report Scope

In this report, the Saudi Arabia Ultrasound Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Ultrasound Devices Market, By Product Type:

Diagnostic Ultrasound Systems

Therapeutic Ultrasound

Saudi Arabia Ultrasound Devices Market, By Application:

Radiology

Cardiology

Obstetrics & Gynecology

Gastroenterology

Urology

Others

Saudi Arabia Ultrasound Devices Market, By Region:

Eastern

Western

Northern & Central

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Ultrasound Devices Market.

Available Customizations:

Saudi Arabia Ultrasound Devices 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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