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Australia and New Zealand Point-of-Care Diagnostic Ultrasound Market Size and Forecast (2020 - 2030), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Technology (2D, 3D/4D, and Others), Portability (Trolley and Compact/Handheld), Application (General Imaging, Surgery, Cardiology, and Others), and End User (Emergency Department, Intensive Care Critical Care, Operating Theatre, IVF Clinics, Physiotherapy Centers, Sports Medicine, General Practitioner, Respiratory Center, Anesthesia, and General Wards)

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Abstracts

The Australia and New Zealand point-of-care diagnostic ultrasound market is expected to grow from US$ 66.01 million in 2022 to US$ 83.53 million by 2030; it is estimated to record a CAGR of 5.24% from 2022–2030.

Analyst’s Viewpoint

Point-of-care ultrasound (POCUS) has been adopted at a growing rate in emergency departments across Australia and New Zealand and is now considered to be a fundamental competency of emergency physicians. Technological advancements have the potential to reduce the negative impact of healthcare access and availability issues in rural and remote areas of Australia. It is highly possible that technology will advance further, and a wider range of users will have access to compact, handheld, and portable ultrasound machines.

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A wider variety of different POCUS devices are available in Australian healthcare facilities compared to the past. The Cairns Hospital in Queensland, Australia, has implemented the state-of-the-art Mindray TEX20 latest high-end POC ultrasound, enabling emergency clinicians to address obstacles, such as scarce resources, diverse patient populations, and lack of follow-up care. POC ultrasound technology has become an essential tool both in facilities such as emergency rooms and ICUs in hospitals. The growing number of elective surgeries and emergencies generate the demand for more safe, accurate, and real-time diagnosis of various conditions by utilizing POC ultrasound.

Market Insights

Increasing Use of Point-of-Care Diagnostic Ultrasound in Emergency Care Drive Australia and New Zealand Point-of-Care Diagnostic Ultrasound Market Growth

The growing incidence of chronic diseases and the number of patients requiring emergency care due to various health ailments, such as acute abdominal pain, urology problems, and immense chest pain, surge the demand for point-of-care ultrasound (POCUS) devices. POCUS facilitates patient care, improves medical procedure efficacy, decreases complications, and saves crucial time. The accuracy of POCUS in diagnosing pulmonary conditions is equivalent or even higher than laboratory markers in diagnosing specific pulmonary conditions.

POCUS has been widely used in many disciplines as a rapid diagnostic tool, especially in emergency medicine. POCUS allows physician assistants (PAs) or nurse practitioners (NPs) in the emergency department to immediately acquire, interpret, and clinically integrate ultrasonographic imaging. In the emergency department, various clinical applications such as FAST exam, focussed echo, lung sonography, fluid drainage, and several other procedures can be performed with the help of these devices. It can be carried out by the attending physician or advanced practice professionals (APPs) and is not limited to any particular protocol. POCUS has been used to aid in the diagnosis of multiple medical conditions ranging from acute appendicitis, airway compromise, and abdominal aortic aneurysm to traumatic injury assessment. It is thus very important for emergency departments to have POCUS so that they can be efficient, effective, and equipped to handle all kinds of emergencies. The relatively fast use has made it a potential option where a formal radiological investigation may delay the diagnosis. Thus, point-of-care diagnostic ultrasound is increasingly adopted in emergency care.

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Future Trend

AI and 5G Technology in POCUS Expected to Accelerate Australia and New Zealand Point-of-Care Diagnostic Ultrasound Market Expansion

Ultrasound equipment is beginning to incorporate robotics, cloud computing, 5G networks, artificial intelligence (AI), and remote technologies. Over time, ultrasound systems have developed into advanced terminal platforms with strong imaging and communication capabilities. Furthermore, specialized ultrasound equipment is typically more needed and appropriate to fulfill the growing needs and specifications of many clinical specializations and departments. Tele-remote POCUS is the technique of acquiring, storing, transmitting, analyzing, and processing photographs remotely by digitally reconstructing POCUS images using contemporary computers, network connectivity, and multimedia technologies. Through high-precision synchronization, remote real-time diagnostic and interventional procedures via text, audio, video, and other multi-channel connections can be enabled.

The real-time, long-distance, high-resolution, high-bandwidth, low-latency requirements for robotic operation and remote ultrasound consultation have been met in recent years by developing 5G technology, which makes it possible to transmit POCUS imaging in high quality and share it as a valuable medical resource. This opens the door to the possibility of tele-remote POCUS technology being used widely. Thus, the increasing adoption of automation in point-of-care ultrasound is anticipated to drive the market in the future.

Report Segmentation and Scope

The " Australia and New Zealand Point-of-Care Diagnostic Ultrasound Market" is segmented on the basis of technology, portability, application, and end user. Based on technology, the Australia and New Zealand point-of-care diagnostic ultrasound market is segmented into 2D, 3D/4D, and others. Based on portability, the Australia and New Zealand point-of-care diagnostic ultrasound market is bifurcated into trolley and compact/handheld. In terms of application, the Australia and New Zealand point-of-care diagnostic ultrasound market is categorized into general imaging, cardiology, surgery, and others. Based on end user, the Australia and New Zealand point-of-care diagnostic ultrasound market is segmented into emergency, intensive care/critical care, operating theater, IVF clinics, physiotherapy centers, sports medicine, general practitioners, respiratory centers, anesthesia, and general wards.

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Technology-Based Insights

Based on technology, the Australia and New Zealand point-of-care diagnostic ultrasound market is segmented into 2D, 3D/4D, and others. The 2D segment held the largest market share in 2022. However, the 3D/4D segment is anticipated to register the highest CAGR during 2022–2030. In ultrasound, B-Mode is a setting that creates a two-dimensional (2D) greyscale image on the ultrasound screen and is the most commonly used mode. It is generally called 2D mode. The 2D ultrasound systems are readily available in the market and are affordable. 2D ultrasounds use high-frequency, non-ionized sound waves that are transmitted and received on one plane. Generally, 2D ultrasound is used to diagnose the health of the fetus in pregnant women. It produces a black-and-white image that shows the skeletal structure of the baby and makes the internal organs visible. The 2D image produced by point-of-care ultrasound (POCUS) allows healthcare professionals to visualize organs, blood vessels, and other structures in real time, helping with diagnosis and guiding procedures. 2D ultrasound is easier to use, time-efficient, and cost-effective compared to other technologies. In addition, advanced image quality and rapid results lead to the usage of this technology in diagnostic centers.

Portability-Based Insights

Based on portability, the Australia and New Zealand point-of-care diagnostic ultrasound market is bifurcated into trolley and compact/handheld. The trolley segment held a larger share in the Australia and New Zealand point-of-care diagnostic ultrasound market in 2022 and is anticipated to register the highest CAGR during 2022–2030. Trolley-based ultrasound is a portable ultrasound equipment often used in medical settings for diagnostic imaging purposes. It allows healthcare professionals to conveniently diagnose bedridden patients at the bedside without interrupting their treatment. Trolley-based diagnostic ultrasounds are convenient to move from one location to another in hospitals and diagnostic centers. These devices are suitable for monitoring fetuses and patients.

The cost-effectiveness of the system and the fact that it does not require more space make it a popular adoption choice for small clinics and physicians. The system’s versatility, user-friendly features, higher adoption of imaging techniques to diagnose diseases, and the increased use of trolley-based ultrasound in acute care and emergency care settings support the growth of the segment in the market.

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Application-Based Insights

In terms of application, the Australia and New Zealand point-of-care diagnostic ultrasound market is categorized into general imaging, cardiology, surgery, and others. The cardiology segment held the largest share in the Australia and New Zealand point-of-care diagnostic ultrasound market in 2022. However, general imaging segment is anticipated to register the highest CAGR during 2022–2030. POC ultrasound refers to using portable ultrasound devices by healthcare providers at the patient's bedside or in the clinical setting. In general imaging, POC ultrasound provides real-time visualization and aids in the diagnosis of various medical conditions. It offers accessibility and portability for various medical settings. Its compact and portable nature allows healthcare providers to perform imaging studies at the patient's bedside, making it easier to assess different anatomical structures and organ systems in real-time. Moreover, POC ultrasound is cost-effective, enhances patient care, improves diagnosis speed, and enhances the efficiency and accuracy of medical evaluations in general imaging. It serves as a rapid and accessible tool for initial assessment, guiding further diagnostics and treatment decisions.

End User-Based Insights

Based on end user, the Australia and New Zealand point-of-care diagnostic ultrasound market is segmented into emergency, intensive care/critical care, operating theater, IVF clinics, physiotherapy centers, sports medicine, general practitioners, respiratory centers, anesthesia, and general wards. The emergency department segment held the largest market share in 2022 and is anticipated to register the highest CAGR during the forecast period.

Australia and New Zealand Point-of-Care Diagnostic Ultrasound market, by End User – 2022 and 2030

Country Analysis

Traditionally, ultrasound was the domain of sonographers, specialist radiologists, and cardiologists. This has changed with the introduction of point-of-care ultrasound (POCUS), which is now used in various specialties for both diagnosis and procedure guidance. Australian rural doctors consider obstetric scanning to be an important component of their POCUS practice. Pregnant women in rural and remote Australia have less access to timely ultrasound services compared to women in metropolitan and regional areas due to a chronic shortage of trained sonographers.

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According to the Australian Institute of Health and Welfare cancer data 2021, cancer is a major cause of illness and death in the country. In 2021, ~151,000 new cancer cases were diagnosed in Australians—an average of 413 cases per day. In the same year, ~49,000 people succumbed to death due to cancer in the country—an average of 135 deaths per day. In addition, colorectal cancer is estimated to be the fourth most diagnosed cancer in the country in 2023, with around 15,400 cases reported that year. POCUS has proved to be an accurate technique for the diagnosis of gastrointestinal cancers.

Strategic Insights

The report profiles leading players operating in the Australia and New Zealand point-of-care diagnostic ultrasound market. These include GE Healthcare; Butterfly Network, Inc.; Fujifilm; Esoate SpA; Hologic, Inc; Echonous Inc; Koninklijke Philips NV; Shenzhen Mindray Bio-medical Electronics Co Ltd; and Clarius Mobile Health Corp. These companies focus on new product launches and geographical expansions to meet the growing consumer demand worldwide and increase their product range in specialty portfolios. They have a widespread global presence, which allows them to serve a large set of customers and subsequently increase their market share.

Industry Developments and Future Opportunities:

In January 2021, Hologic Inc expanded its ultrasound portfolio by launching a new SuperSonic MACH 20 ultrasound system. Hologic Inc offers three ultrasound technology tiers that ensure more facilities have access to customized ultrasound solutions to address their unique imaging needs. The systems are designed to increase efficiency and diagnostic accuracy, feature high-quality images and innovative imaging modes, and offer an intuitive user experience.

In July 2020, FUJIFILM Sonosite, Inc launched the new Sonosite PX ultrasound system. Sonosite PX is the next generation in Sonosite POCUS, with the most advanced image clarity ever seen in a Sonosite system, a suite of workflow efficiency features, and an adaptable form factor.

In March 2020, EchoNous Inc announced FDA approval of its KOSMOS Platform, which consists of a distinctive 8oz. Ultrasound-based tool is combined with deep learning for clinical assessment of the heart, lungs, and abdomen. It is

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the first tool in medicine to apply the mathematical framework of machine learning to mimic the human learning and decision-making process.

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