

Asia Pacific Portable X-Ray Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Asia Pacific Portable X-Ray Devices Market size is estimated at USD 1.54 billion in 2024, and is expected to reach USD 2.57 billion by 2029, growing at a CAGR of 10.75% during the forecast period (2024-2029).

During the COVID-19 pandemic, the number of visits to hospitals and diagnostic centers for X-ray imaging decreased in the early pandemic period in the Asia-Pacific countries. For instance, according to an article published by BMC Cancer in December 2022, a study was conducted in Japan that showed that COVID-19 had prolonged collateral effects on cancer care in Japan, including examination, diagnosis, and surgery, with significant effects on breast cancer, among others. Thus, owing to the COVID-19 pandemic, x-ray procedures such as mammography were significantly impacted during the initial pandemic phase. However, as the pandemic has subsided, X-ray imaging has gone back to normal, so the studied market is expected to have stable growth during the forecast period of the study.

The major factors contributing to the growth of the Asia-Pacific portable X-ray devices market are the rising burden of diseases requiring diagnosis and the rising technological advancement of X-ray devices.

Tuberculosis is one of the major diseases that require a chest x-ray for the proper diagnosis of the disease. The increasing prevalence of tuberculosis in Asian countries is expected to boost the growth of the market during the forecast period of the study. For instance, according to an article published by WHO in 2022, 30 high tuberculosis burden countries around the world accounted for 87% of all estimated incident cases worldwide in 2021, among which China accounted for 7.4% of the cases, which is the third highest in 2021. According to the same source, China is also considered a high-burden country for tuberculosis (TB), Human Immunodeficiency Virus (HIV) related TB, and Multidrug-resistant tuberculosis /rifampicin-resistant (MDR/RR-TB) for the time period between 2021 and 2025.

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Furthermore, according to the India TB Report 2022 published in March 2022, tuberculosis (TB) patients in India were estimated to increase by 19% in 2021 when compared to the previous year. The source also stated that the total number of incident TB patients (new and relapse) notified during 2021 was 19,33,381.

Moreover, the rising prevalence of dental diseases and the deteriorating dental health in the Asia-Pacific countries are expected to boost the usage of dental x-ray devices during the forecast period of the study. For instance, according to an article published by PubMed Central in November 2022, a study was conducted in China, which showed that dental patients' oral health needs to be improved in the country as the majority of patients were reported to be practicing poor oral health behaviors. Thus, the deterioration of oral health is also expected to boost market growth.

Furthermore, the rising product launches by major market players are also expected to enhance market growth. For instance, in March 2021, Fujifilm India Pvt. Ltd. launched its mobile digital radiology system 'FDR Nano.' This new device offers high-resolution imaging with low X-ray doses in healthcare settings.

Hence, the aforementioned factors, such as the rising prevalence of dental diseases and tuberculosis and the rising product launches by major market players, are expected to boost the market growth. However, the high cost of devices is expected to impede the market growth.

Asia Pacific Portable X-Ray Devices Market Trends

Mammography Segment is Expected to Grow With a Significant CAGR Over the Forecast Period of the Study

Mammography refers to a standard diagnostic and screening technique used to screen breast tissues to check the presence of a malignant tumor. The process involves the usage of low-energy X-rays for the early detection of breast cancer. The rising prevalence of breast cancer cases and the increasing technological advancements in mammography are expected to boost segment growth.

For instance, according to the data updated by Cancer Australia in January 2023, it was estimated that 20,640 new cases of breast cancer would be diagnosed in Australia in 2022, out of which 212 would be males and 20,428 females. The source also stated that it was estimated that a person had a 1 in 15 (or 6.7%) risk of being diagnosed with breast cancer by the age of 85 in 2022 in Australia. Thus, the high prevalence of breast cancer in Australia is expected to boost the adoption of mammography, which will drive the growth of the segment.

Furthermore, according to the bi-annual report published by the Indian Council of Medical Research (ICMR) in December 2022, the national average of cancer cases for 2022 in India was 100.4 per 100,000, with a large number of women (an estimated 105.4 per 100,000) being diagnosed with breast cancer. The source also stated an estimated 182,000 people were living with breast cancer in India in 2022, and this is expected to reach 250,000 by 2030. Thus, due to the high burden of breast cancer in the country, the demand for mammography procedures is expected to increase, which will drive the growth of the studied segment.

Moreover, the launch of technologically advanced products in the market is also boosting the segment's growth. For instance, in October 2022, GenWorks launched Braster Pro for breast cancer screening in India, and it has been shown that combining Braster with other screening devices like mammography can increase efficiency by up to 9%. Such launches of advanced products are expected to propel the growth of the market segment.

Thus, the above-mentioned factors, such as the increasing advantages of digital mammography and the rising prevalence of breast cancer, are expected to boost the segment growth.

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Japan is Expected to Hold a Significant Share of The Market Over the Forecast Period of the Study

The major factors driving the growth of the market in Japan are the increasing prevalence of X-ray diagnosis for screening diseases such as breast cancer and lung cancer, the increasing launch of technologically advanced products, the rising geriatric population, and the growing research and development regarding various diseases in the country.

For instance, according to the data published by National Cancer Center Japan in June 2022, an estimated 1,019,000 new cases of cancer are expected in Japan in 2022, out of which 95,000 new cases of breast cancer are expected. Thus, the high burden of breast cancer in the country is expected to boost the usage of X-ray devices such as mammography during the forecast period of the study.

Furthermore, according to the data published by the International Osteoporosis Foundation (IOF) in June 2022, it was estimated that 13 million people were living with osteoporosis in Japan in 2022. This bone disorder results in painful and disabling fragility fractures, often leading to long-term loss of mobility and independence in older adults, and it can be diagnosed by X-ray imaging procedures. Thus, the high prevalence of osteoporosis in Japan is also expected to boost segment growth.

Moreover, the developments by market players in Japan are also expected to enhance market growth. For instance, in November 2022, Canon Inc. installed a domestically produced X-ray CT system, which had a photon-counting detector system, at the National Cancer Center of Japan Exploratory Oncology Research & Clinical Trial Center.

Hence, the aforementioned factors, such as the rising prevalence of X-ray diagnosis-requiring diseases in Japan, are expected to boost the market growth.

Asia Pacific Portable X-Ray Devices Industry Overview

The Asia-Pacific portable X-ray devices market is moderately competitive and consists of several players. In terms of market share, a few of the major players are currently dominating the market. Some prominent players are vigorously making acquisitions and joint ventures with other companies to consolidate their market positions across the region. The major players in the Asia-Pacific portable X-ray devices are Canon Inc., Carestream Health Inc., Fujifilm Holdings Corporation, GE Healthcare, Hitachi Ltd, Hologic Inc., Koninklijke Philips N.V., and Samsung, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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