

China Digital X-Ray - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The China digital X-ray market size is expected to grow from USD 0.65 billion in 2024 to USD 1.0 billion by 2029, at a CAGR of 9.10% during the forecast period (2024-2029).

The COVID-19 pandemic had a significant impact on the digital X-ray market growth in the country. Various researchers proposed many studies demonstrating the advantages of chest X-rays for detecting COVID-19 among patients. For instance, as per the article published in October 2022 in ScienceDirect, researchers from China proposed a multiscale class residual attention (MCRA) network via chest X-ray (CXR) image classification for the detection of COVID-19. Due to this, the demand for digital X-rays during the pandemic rose slightly, which significantly impacted the market growth. Moreover, it is believed that the market is expected to register significant growth in the coming years due to the increase in various chronic diseases and the rise in the adoption of digital X-rays due to their advantages over other imaging technologies.

Factors such as an increase in cases of chronic diseases, a rise in strategic activities by the key players, and rapid technological advancements in digital X-ray systems in China are expected to bolster market growth over the forecast period. For instance, according to the number of new tuberculosis patients registered in China's tuberculosis information surveillance system, China's tuberculosis population in 2021 was 780,000, and the estimated tuberculosis incidence rate was 55 per 100,000. Hence, the high incidence of tuberculosis is expected to increase the demand for digital X-rays for accurate diagnosis and further treatment, thereby contributing to market growth.

Major players are engaged in a variety of strategic activities, such as product launches, collaborations, partnerships, mergers, and acquisitions, which are likely to bolster the growth of the market over the forecast period. For instance, in August 2022, Tuodao Medical Technology Co., Ltd. presented two products of its orthopedic surgery robot and mobile C-arm X-ray machine at

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the China Yangtze River Medical Forum - 2022 Orthopedic Annual Meeting. This product coordinates perspective imaging systems, image navigation systems, and robots, which can provide a stable and intelligent support platform for surgery. The robot image navigation technology makes the anatomical structure visualized to carry out detailed operation planning, improve the accuracy of operation, and, at the same time, significantly reduce the amount of X-ray radiation during operation. Hence, strategic product exhibitions like these are anticipated to drive market growth in China over the study period.

Therefore, owing to the increase in chronic disease cases and the rise in strategic activities by the key players, the studied segment is expected to witness significant growth in China over the forecast period. However, the high cost of the equipment is expected to hinder market growth.

China Digital X-Ray Market Trends

Portable X-ray System Segment is Expected to Hold a Significant Market Share Over the Forecast Period

A portable X-ray device is a wireless digital X-ray imaging device for mobile health providers, such as doctors and first-aid workers in field situations, during home care, and in nursing homes and hospitals. Portable digital X-ray systems directly convert the transmitted X-ray radiation into a digital image using an array of solid-state detectors, such as amorphous selenium or silicon and display the image directly on the computer. The digital X-ray emits very little radiation than analog (traditional) X-rays, making it highly safer. The images produced by the digital system are of high quality. They are produced immediately after the procedure, thus reducing the waiting time.

The portable segment is expected to witness significant growth in the studied market owing to the rise in the geriatric population, the launch of technologically advanced products, and the surge in chronic diseases in China. For instance, as per the China Aging Research Report 2022, it is estimated that by 2057, the population over the age of 65 in China is expected to reach a peak of 425 million people, accounting for the proportion of the total population. Hence, the presence of a high geriatric population and the continuous increase in their number is expected to play a significant role in the growth of portable digital X-ray devices in China over the forecast period. Furthermore, an increase in strategic activities by the key players in China is expected to bolster market growth over the forecast period. For instance, in March 2021, Zepp Health Corp and Rouumtech Co., Ltd expanded their agreement, initially reached with predecessor Aspen Imaging Healthcare, to private label a customized Europa portable X-ray system, along with the company's entire line of X-ray imaging products, for sales in China.

Thus, owing to the increase in the geriatric population and various product launches, the studied segment is expected to witness significant market growth over the forecast period.

Orthopedic Segment is Expected to Witness a Significant Growth in the Studied Market Over the Forecast Period

Factors such as an increase in the prevalence of orthopedic diseases, a rise in the geriatric population, an increase in accidents and injuries, rapid technological developments, and advantages offered by digital X-ray equipment in diagnosing different types of orthopedic diseases are the major factors attributing to the growth of this segment in China. For instance, according to the Guidelines for The Diagnosis and Treatment of Knee Osteoarthritis (KOA) with Integrated Traditional Chinese and Western Medicine published in January 2023, the prevalence of KOA is 24.7% for males and 54.6% for females, and it mostly occurs in people over 40 years old middle-aged and elderly people, and the final disability rate of the disease is 53%. With the aging of the social population, the incidence of this disease is on the rise. Due to this, the demand for digital X-rays is expected to increase in the country, which may drive the growth of the studied segment.

Furthermore, an increase in sports injuries in China is likely to utilize X-ray systems for further diagnosis and treatment. For instance, as per the article published in December 2022 in MedRxiv, during the Beijing 2022 Winter Olympic Games, the injury

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incidence was high in athletes (14.4%), team officials (8.8%), staff (2.1%), and volunteers (2.1%). Also, the medical staff reported 725 injuries and 1119 illnesses, comprising 24 injuries and 31 illnesses per 1000 athletes and nonathletes during the Winter Olympic Games. Thus, owing to the increase in sports injuries, the demand for digital X-rays is likely to rise, thereby fueling the segment's growth over the coming years. Moreover, the presence of various key players and their strategic activities in the market for digital X-rays in China, including new launches and partnerships, are expected to foster the growth of the market. For instance, in May 2021, Agfa launched DR 100, a mobile DR imaging solution, at the China International Medical Equipment Fair (CMEF) in Shanghai.

Thus, owing to the high prevalence of injury cases, the rise in the geriatric population, and the rise in the adoption of digital X-rays in orthopedic disease detection coupled with various strategic activities by the key players, the studied segment is expected to witness significant growth over the forecast period.

China Digital X-Ray Industry Overview

China digital X-ray market is moderately competitive and consists of several major players. Some of the companies that are currently dominating the market are Canon Medical Systems, Siemens Healthcare GmbH, GE Healthcare, Fujifilm Holdings Corporation, and Koninklijke Philips NV among others.

Additional Benefits:

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

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