

Germany Computed Tomography - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Germany computed tomography market size is estimated at USD 510.97 million in 2024 and is expected to reach USD 691.69 million by 2029, registering a CAGR of 6.25% during the forecast period.

Key Highlights

- The COVID-19 pandemic significantly affected market growth as the demand for computed tomography (CT) scanners increased with the surge in the number of COVID-19 cases. For instance, as per the article published by the National Center for Biotechnology Information (NCBI) in December 2021, the outbreak of the COVID-19 pandemic was associated with a significant temporary decline in the imaging volume in Germany. However, a quick recovery was observed after the first lockdown period, with radiologic imaging examinations steadily approaching prior-year figures.
- Furthermore, several studies were being conducted in Germany to analyze the efficacy of computed tomography for detecting the COVID-19 virus. For instance, a study published by BMC Infectious Diseases in February 2021 concluded that CT scans showed high efficacy in the detection of pneumatic changes in COVID-19 patients. The study was conducted on 219 patients in Germany with suspected COVID-19 who received radiological imaging and RT-PCR for SARS-CoV-2. The study revealed that the initial RT-PCR was negative in 4.2% of patients. In comparison, the initial CT scan revealed pneumonic findings in 50.7% of patients; 55.0% were COVID-19 positive and had evidence of pneumonia.
- Therefore, looking at the overall scenario, it was observed that the COVID-19 pandemic had a significant impact on the market studied. However, the market has reached its pre-pandemic nature regarding the demand for CT scan products and is expected to witness healthy growth during the forecast period.
- The major factors responsible for the high growth in Germany's computed tomography market include the increasing prevalence of chronic diseases, the rising geriatric population, and increasing technological advancements in CT devices.
- Smoking is a major factor responsible for various chronic diseases like cancer and cardiovascular diseases. Therefore, the number

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of people smoking in the country significantly impacts the prevalence of cardiovascular diseases (CVD). For instance, as per the article published by the Foundation for A Smoke-Free World in June 2022, the rates of tobacco smoking in Germany are significantly higher compared to other European nations.

-It is reported that more than one in four Germans over the age of 14 are current smokers. As per the same source, currently, there are 17.5 million smokers in Germany. Thus, due to the high number of smokers in Germany, the risk for cancer, cardiovascular diseases, and other chronic diseases is high, which is expected to drive the demand for computed tomography for diagnostic purposes during the forecast period.

-Furthermore, the government organizations in Germany are actively participating in supporting the healthcare sector in the country, which is also burgeoning the market growth. For instance, in July 2021, the German Representative Office in Ramallah and the United Nations Development Programme handed the Minister of Health over specialized medical equipment supporting critical health facilities in the West Bank. The organization supported USD 1.3 million in medical equipment, including CT scans, digital radiography machine, and others.

-Hence, due to the abovementioned factors, the market is expected to experience significant growth during the forecast period. However, the lack of proper reimbursement, stringent regulatory approval procedures, and the high cost of equipment are certain factors that are expected to impede the market growth.

Germany Computed Tomography Market Trends

Oncology Segment is Expected to Witness a Healthy Growth in the Coming Years

- The major factors attributing to the growth of the cancer applications for the computed tomography segment in Germany include the rise in cancer disorders and greater applications of computed tomography devices in diagnosing different types of cancer.

- According to the article published by the European Commission in March 2022, the number of people diagnosed with cancer by 2040 in the European Union, including Germany, is estimated to increase by 21% compared to 2020. Thus, the country's high number of people who have cancer is projected to drive the demand for computed tomography for diagnostic purposes.

- Furthermore, various efforts taken by public organizations in the country to combat the rising cancer cases are also increasing the demand for computed tomography. For instance, in May 2021, BREATH, a Member of the German Center for Lung Research (DZL), launched the HANSE prevention program with free lung checks for former and active smokers to detect lung and cardiac diseases early.

- With the aid of the program, around 5,000 participants in Germany received a free examination in a modern low-dose computed tomography (CT) scan in a mobile study unit moving between Hannover Medical School (MHH), the University Medical Center Schleswig-Holstein, Lubeck Campus (UKSH) and the LungenClinic Grosshansdorf (near Hamburg). According to the same source, lung cancer screening by low-dose computer tomography (CT) scan can lower the lung cancer mortality rate in former and active heavy smokers through earlier initial diagnosis.

- Hence, such initiatives taken by government organizations in the country are set to drive market growth during the forecast period.

Hospitals Segment is Expected to Witness Significant Growth Over the Forecast Period

- The hospital segment is expected to witness healthy growth during the forecast period due to many hospitals in the country and the high adoption of radiology equipment such as CT scans.

- The presence of a high number of hospitals in the country is projected to intensify the demand for CT scans to diagnose various diseases. For instance, as per the article released by Verdict Media Limited, in June 2022, Germany was home to more than 1,900

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registered hospitals with more than 480,000 beds in December 2021. The hospitals are classified into public, private, voluntary, or non-profit. As per the same source, five of the top hospitals in Germany based on bed size are in Baden-Wurttemberg. With more than 3,000 beds, Charite - Universitatsmedizin Berlin is the largest hospital, followed by Universitätsklinikum Freiburg.

- Furthermore, the availability of CT scans has increased in German hospitals in the past few years, also driving segment growth. For instance, according to the article published by the National Center for Biotechnology Information (NCBI) in November 2021, the availability of large-scale medical equipment such as computed tomography (CT) has increased in Germany in recent years. Among Organisation for Economic Co-operation and Development (OECD) countries, Germany ranks high according to the number of imaging technologies and their applications per inhabitant.

- Hence, due to the abovementioned factors, the segment is expected to register significant growth during the forecast period.

Germany Computed Tomography Industry Overview

The Germany computed tomography market is moderately competitive and consists of several major players. Some companies currently dominating the market are Canon Medical Systems, Konig Corporation, GE Healthcare, Planmeca Group (Planmed OY), 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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