Italy Nuclear Imaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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Report description:

The Italy Nuclear Imaging Market size is estimated at USD 248.82 million in 2024, and is expected to reach USD 285.80 million by 2029, growing at a CAGR of 2.81% during the forecast period (2024-2029).

The pandemic had an adverse effect on the market growth in Italy. Due to COVID-19 in the country, most radioiodine treatments were delayed, and all the conventional nuclear imaging studies Fluorodeoxyglucose (FDG) PET scans were canceled. Approximately 8% of respondents to the study "Impact of the COVID-19 Pandemic on Radiotherapy Supply" published in the National Center for Biotechnology Medicine in May 2021 modified their radiotherapy treatment by canceling or delaying their appointment, according to the study. Stefano Fanti, MD: Department of Oncology, Division of Nuclear Medicine, University of Bologna, Bologna, Italy stated that they have rescheduled all non-high-priority scans, namely routine control examinations, and have reduced the number of their nuclear imaging studies by 20% in the study "Nuclear Medicine Operations in the Times of COVID-19: Strategies, Precautions, and Experiences" published in The Journal of Nuclear Medicine in May 2020. Thus, the aforementioned factors had an effect on the Italian nuclear imaging market.

The market is projected to develop as a result of increasing diagnostic applications in conditions such as cancer and cardiovascular disorders as well as initiatives taken by major industry participants. Cancer and heart conditions can be effectively treated with nuclear medicine. The rising prevalence of chronic disorders in the area is hence fueling market expansion. According to Globocan 2020, number of cancer cases in Italywas around 415,269 in 2020 and this is expected to increase, over the coming years. According to the research study titled "Trends in cardiovascular diseases burden and vascular risk factors in Italy" published in August 2020, the cardiovascular burden Italy 2020 reported that the prevalence of cardiovascular disorders grew from 5.75 million to 7.49 million cases across all age categories. The market expansion will be accelerated by the anticipated rise in demand for nuclear imaging diagnostics due to the increased prevalence of heart illnesses. Early detection made possible by

PET/SPECT would reduce mortality, hence market growth is anticipated going forward. There are many research studies that are taking place in France in the field of SPECT imaging for neurological disease diagnosis. For instance, in May 2020, a study titled, '123I-FP-CIT SPECT validation of nigro-putaminal MRI tractography in dementia with Lewy bodies was published in the European Radiology Experimental. For this study, researchers used Ioflupane (123I-FP-CIT) single-photon emission computed tomography (SPECT) to assess nigrostriatal degeneration, which is a key differentiating element between dementia with Lewy bodies and Alzheimer's disease, and compare it with a mask-based approach that uses MRI. Studies such as these are expected to increase the scope of the use of SPECT in the diagnosis of neurological diseases. Therefore, it is anticipated that the aforementioned reasons will fuel market expansion throughout the forecast period.

However, it is anticipated that the market expansion in Italy will be constrained by the absence of adequate reimbursement, strict regulatory approval procedures, and the high cost of equipment.

Italy Nuclear Imaging Market Trends

Equipment Segment is Expected to Hold a Significant Market Share Over the Forecast Period

The high number of PET scans in the country coupled with increasing research studies and initiatives by key market players are expected to increase the market growth. The rise in usage of PET Scanners in the country for diagnosis and imaging of various diseases boosts the growth of the studied market. As per the Organisation for Economic Co-operation and Development (OEC) statistics, an estimated 5,200,916 clinical PET scans were performed in Italy in 2020 compared to an estimated 5,809,718 PET scans performed in 2019. Even though the scans in 2020 were less, however, considering the pandemic the number of scans was quite high. Thus, it is expected to increase in the future. Furthermore, stand-alone systems in addition to improved hybrid imaging designs and the development of novel theragnostic methods made it possible for nuclear medicine techniques to be used more widely in a variety of diagnostic scenarios, according to the article by Cuocolo et al., published by the Department of Advanced Biomedical Sciences, University Federico II, Naples, Italy in April 2021. The two main nuclear medicine diagnostic methods are positron emission tomography (PET) and single-photon emission computed tomography (SPECT). Additionally, as the need for nuclear imaging for diagnosis rises, several businesses are expressing an interest in working with the producers of radiopharmaceuticals and medical equipment, which in turn is fueling the market's expansion. For instance, in May 2021, To aid in the creation of artificial intelligence (AI) algorithms, Bracco Imaging collaborated with Italian hospitals and made a sizable dataset of chest x-rays from COVID-19 patients available. More than 1,000 chest radiographs from COVID-19 patients, along with the patient's clinical details, are available in the AIforCOVID Imaging Archive. Such initiatives are expected to increase market growth.

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Italy Nuclear Imaging Industry Overview

Italy nuclear imaging market is moderately competitive and consists of several major players. Some of the companies that are currently dominating the market are Canon Inc. (Canon Medical Systems Corporation), GE Healthcare, Siemens Healthineers AG , 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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