

Italy Ultrasound Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Italy ultrasound devices market size is expected to grow from USD 300.72 million in 2024 to USD 380.35 million by 2029, at a CAGR of 4.78% during the forecast period (2024-2029).

Key Highlights

- COVID-19 had a significant impact on the ultrasound device market in Italy, as ultrasound usage for COVID-19 diagnosis increased during the pandemic. For instance, according to a study published in October 2021 in Internal and Emergency Medicine, during the SARS-CoV-2 pandemic, point-of-care ultrasonography was used to rapidly detect interstitial lung involvement in patients with signs of COVID-19 infection. Thus, COVID-19 affected the market for ultrasound devices in Italy.
- However, currently, the market is growing at a stable pace owing to a resumption of imaging diagnosis procedures, manufacturing activities, and the availability of products, and it is expected to witness a similar trend over the coming years.
- The increasing prevalence of chronic diseases such as cardiovascular diseases, cancer, and other chronic diseases, along with technological advancements in ultrasound devices, is expected to grow the ultrasound market in Italy during the study period. Thoracic ultrasound detects peripheral lesions in patients with pulmonary tuberculosis, such as consolidations and tiny subpleural consolidations, and thus, the number of tuberculosis patients is predicted to rise, driving the market growth.
- For instance, according to the World Health Organization (WHO) report published in 2022, in 2021, Italy had 2,900 people infected with tuberculosis. Furthermore, in 2021, the incidence of HIV-positive TB was 150 per 100,000 people, and multidrug-resistant tuberculosis/rifampicin-resistant tuberculosis (MDR/RR-TB) was 85 per 100,000 people. Thus, the huge burden of tuberculosis in the country is expected to increase demand for effective diagnosis, thereby boosting the market growth.
- Some of the key market players that manufacture ultrasonic equipment are present in Italy. These firms are constantly expanding and releasing new products, among other things, which will aid the country's market growth over time. For instance, in September 2021, Esaote, an Italian company, introduced E-Shop, a new online store designed to more efficiently and effectively

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connect with medical professionals.

-Additionally, in May 2021, Esaote launched the MyLab X9 ultrasound machine in Italy. MyLab X9 offers superior image quality and data processing capabilities while utilizing the most recent technological advancements to investigate the newest areas of ultrasound imaging. The introduction of technologically advanced products makes them accessible to the end user, which is likely to boost market growth.

-Thus, the abovementioned factors, such as the growing burden of chronic diseases and strategic activities by the market players, are expected to increase market growth. However, stringent regulation may restrain the market over the forecast period.

Italy Ultrasound Devices Market Trends

2D Ultrasound Imaging Segment is Expected to Hold a Significant Market Over the Forecast Period

- 2D ultrasounds are flat, black-and-white moving images of the inside of the body. The ultrasound transducer delivers sound waves through the body and back to create a basic image of the organs. The presence of market players that offer 2D ultrasound in the country, along with the rising adoption of ultrasound systems and advancements in 2D ultrasound systems, are the factors that are expected to drive the growth of 2D ultrasound systems in this country.

- 2D ultrasound is effective for diagnosing chronic diseases such as cancer, and the rising number of cancer cases is expected to boost segment growth. Furthermore, according to the Number of Cancers in Italy Report 2022, there were 390,700 new cancer diagnoses (205,000 in males and 185,700 in females) in 2022 in Italy. Thus, the high burden of cancer is expected to increase demand for ultrasound diagnosis, boosting the segment's growth.

- Further, the presence of market players that offer 2D ultrasound in the country will likely increase the accessibility of these devices, thereby boosting the segment's growth. For example, Esaote, Canon, and Siemens are some of the key players that offer 2D ultrasound devices nationwide.

- Hence, due to the above factors, such as the growing burden of cancer and the presence of market players, it is expected to drive market growth in this region.

Musculoskeletal Segment is Expected to Hold Significant Share Over the Forecast Period

- Musculoskeletal conditions are characterized by pain and limitations in mobility, dexterity, and overall level of functioning, reducing people's ability to work. Also, as per the World Health Organization (WHO), musculoskeletal conditions comprise more than 150 conditions and include conditions that affect joints, such as osteoarthritis, rheumatoid arthritis, psoriatic arthritis, gout, and ankylosing spondylitis, among others.

- Ultrasound systems are used to generate detailed pictures of joints, soft tissues, and bones, which help in the detection, diagnosis, and monitoring of musculoskeletal disorders. With the rising burden of musculoskeletal disorders in the country, the musculoskeletal segment in the studied market is expected to grow.

- According to the study published by the Annals of Rheumatic Diseases in February 2023, the prevalence of rheumatoid arthritis (RA) in Italy is 0.57%, which is consistent with data from other European nations. Females were shown to have a higher incidence, especially among younger patients. Moreover, musculoskeletal conditions are prevalent in the geriatric population, and the growing burden of the elderly population in the country is expected to boost the segment over the forecast period.

- For instance, according to the 2022 statistics published by the United Nations Population Fund, in Italy, 64% were aged 15-64 years in 2022, and 24% were 65 years and older in 2022. Thus, the expected increase in the geriatric population makes them more susceptible to developing musculoskeletal diseases, thereby boosting segment growth.

- Regional market players are focusing on adopting various growth strategies, such as new product launches, innovations in

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existing products, and mergers and acquisitions, to introduce more efficient medical diagnostic devices and strengthen their market presence.

- For instance, in July 2021, Affidea, one of the leading European providers of diagnostic imaging, outpatient, and cancer care services, acquired Centro Diagnostico Lodigiano (CRL), one of the well-known diagnostic imaging medical providers in Lodi, Lombardy region, Italy. The collaboration increases the usage of ultrasound in the country due to the expanded services and is expected to contribute to the market segment's growth.

- Thus, the growing burden of musculoskeletal diseases, the geriatric population, and strategic activities by market players are expected to boost segment growth over the forecast period.

Italy Ultrasound Devices Industry Overview

Italy's ultrasound devices market is moderately competitive and consists of several major players. Some of the companies that are currently dominating the market are Canon Medical Systems Corporation, GE Healthcare, Fujifilm Holdings Corporation, Siemens Healthineers AG, 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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