North America Digital X-ray - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The North America Digital X-ray Market size is estimated at USD 6.05 billion in 2024, and is expected to reach USD 9 billion by 2029, growing at a CAGR of 8.26% during the forecast period (2024-2029).

The outbreak of the pandemic impacted the market. Digital X-ray devices were widely used during the pandemic to evaluate symptomatic patients with suspected or confirmed COVID-19 disease in North America. For instance, according to a research study published in November 2020, accurate diagnosis of COVID-19 with chest X-rays ranged from 57.0% to 89.0%. X-ray devices played an essential role in detecting such visual responses associated with the COVID-19 infection. As a result of the efficiency of digital X-ray devices in detecting COVID infection, they were quickly adopted in the diagnosis of lungs during the pandemic.However, a decrease in imaging volumes during the pandemic imposed a slight short-term negative impact on the market. Thus, during the initial days of the pandemic, the market witnessed moderate growth. However, the upliftments of lockdowns, declining Corona cases, and increasing in-clinic patient visits during the later times of the pandemic helped the market gain momentum and are expected to continue the upward trend over the forecast period.

The increasing occurrence of orthopedic diseases and cancers, technological advancements in digital X-ray technology, and advantages over conventional X-rays are the major factors propelling market growth. For instance, as per the report published by the American Cancer Society in January 2022, around 19,880 women were expected to be diagnosed with ovarian cancer in 2022. It was also reported that ovarian cancer ranks fifth in cancer deaths among women, accounting for more deaths than any other cancer of the female reproductive system. In addition, it also reported a woman's risk of getting ovarian cancer during her lifetime is about 1 in 78, and her lifetime chance of dying from ovarian cancer is about 1 in 108. The same source also stated that cancer mainly develops in older women. Around half of the women who were diagnosed with ovarian cancer are 63 years of age or older. It is more common in white women than in African-American women. Thus, the increasing prevalence of cancer is expected to propel the demand for digital X-rays, and considerable market growth is expected over the forecast period.

Major players in the market are also using new technologies as a way to keep their positions in the market.The companies are also investing in R&D activities for technologically advanced products. For instance, in September 2021, GE Healthcare launched AMX Navigate, a new portable, digital X-ray system equipped with a power-assisted free motion telescoping column that aims to reduce lift force by up to 70.0% and decrease technologist injury. The new device is also equipped with Zero Click Exam, which increases efficiency by automating workflow and reducing user interface interactions. Therefore, owing to such instances, considerable market growth is anticipated over the forecast period in the North American region.

However, the high initial cost of installation may hinder the market's growth over the forecast period.

North America Digital X-Ray Market Trends

Portable Systems Segment is Expected to Witness Significant Growth Over the Forecast Period

Portable 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 compared to analog (traditional) X-rays, making it highly safe. The images produced by the digital system are of high quality. They are produced immediately after the procedure, thus reducing the waiting time.

The main things that drive the segment are the growing use of portable digital X-ray systems and the rising number of cancer cases in North America. For instance, as per the American Cancer Society, "Cancer and Figures 2022", there will be an estimated 1.9 million new cancer cases diagnosed in 2022. Also, a report from the American Cancer Society said that in the United States in 2023, there would be about 1,958,310 new cases of cancer and 609,820 deaths from cancer. The same source also said that the number of people getting prostate cancer has gone up by 3.0% every year since the previous years. Since portable digital X-rays are one of the most important tools for finding cancer, more cases of cancer are likely to be good for the growth of the segment. Also, the launch of new products by the major players is expected to help the segment grow. For instance, in August 2020, Canon Medical launched the Solus 500 mobile digital X-ray system in the U.S. market. This new system offers enhanced ease of use, increased productivity, enhanced safety features, simplified detector charging, and increased storage capacity. Therefore, the launch of new advanced products may create new opportunities and increase the competitiveness of the market, thereby driving segment growth.

United States is Expected to Witness Considerable Growth Over the Forecast Period

The United States is expected to witness considerable growth in the overall digital X-ray devices market over the forecast period. The growth is due to things like a rapidly improving healthcare infrastructure, a rise in chronic diseases, and the fact that there are players in this region who are very good with technology.For instance, according to the GLOBOCAN 2020 report, 2,281,658 new cancer cases were diagnosed in the United States in 2020, with 612,390 fatalities. Therefore, increasing cases of cancer in the United States are expected to propel the demand for digital X-rays, thus surging market growth.

Key product launches, a high concentration of market players or manufacturers' presence, acquisitions and partnerships among major players, and increasing cases of chronic diseases in the United States are some of the factors driving the growth of the North American digital X-ray market in the country. For instance, in September 2021, GE Healthcare introduced the AMX Navigate, a new portable, digital X-ray system designed with a first-of-its-kind power-assisted Free Motion telescoping column that aims to reduce lift force by up to 70.0% and decrease technologist injury. Similarly, in May 2021, KA Imaging signed a distribution agreement in the United States with Alpha Imaging. Hospitals, medical facilities, and practices from 14 states have access to the Reveal 35C single-exposure, portable, digital dual-energy subtraction digital radiography (DR) X-ray detector through Alpha

Imaging. Thus, due to the development of innovative solutions, the market is expected to experience tremendous growth in the country.

North America Digital X-Ray Industry Overview

Countries in North America, such as the United States and Canada, have policies that encourage R&D and welcome newer technologies. Hence, the adoption rate of newer technologies in these countries is very high. Mexico is a developing country, making it a lucrative market for many global players. Moreover, with the presence of more developed countries in its vicinity, access to the Mexican market becomes very easy as most of the global players are present in the United States and Canada. The competitive landscape includes an analysis of a few international as well as local companies that hold market shares and are well known, including Carestream Health Inc., Fujifilm Medical Systems, GE Healthcare, Hitachi Medical Corporation, and Hologic Corporation, among others.

Additional Benefits:

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

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