

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

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Report description:

The Spain digital X-ray market size is expected to grow from USD 295.9 million in 2024 to USD 404.5 million by 2029, at a CAGR of 6.45% during the forecast period (2024-2029).

The COVID-19 pandemic had a significant impact on the Spain digital X-ray market since the chest X-ray of suspected COVID-19 patients predicted the infection and its severity. For instance, as per the article published in February 2021 in Elsevier, chest X-ray was generally the first-line imaging test in patients with suspected or confirmed COVID-19 due to its usefulness, availability, and low cost. However, the large volume of chest X-rays taken during the COVID-19 pandemic requiring a radiology report represented a challenge for diagnostic imaging departments in Spain. Many of these reports have been prepared with no PCR results and scant clinical information. Due to the surge in X-ray diagnosis demand, the market witnessed significant growth during the pandemic. Since the pandemic restrictions are eased, the market is expected to experience significant growth in the coming years owing to the rapid technological advancements in digital X-ray systems coupled with a surge in chronic diseases.

Factors such as increasing chronic disorders coupled with increasing initiatives by market players are expected to increase market growth. For instance, as per the estimated date of the Spanish Network of Cancer Registries report published in 2023, 3,378 cases are likely to be diagnosed with larynx cancer in 2023. Hence, a high prevalence of larynx cancer is expected to raise the demand for chest X-rays and, thereby, contribute to market growth over the forecast period.

Moreover, an increase in strategic activities by the key players and technological advancements in X-ray systems are expected to bolster market growth. For instance, in January 2021, Hospital Sant Joan de Deu in Barcelona, Spain, introduced two mobile DR

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100s direct radiography (DR) systems to its diagnostic imaging equipment portfolio. Hospital Sant Joan de Deu also has three DX-M computed radiography (CR) systems suitable for mammography and a high-performance DR 800 multi-purpose imaging solution. Thus, the adoption of digital X-ray equipment in Spain is expected to bolster the market growth over the forecast period.

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

Spain Digital X-Ray Market Trends

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

A portable X-ray machine is an X-ray unit that's smaller than a fixed one and can be moved. It allows radiographers, vets, and dental professionals to take X-ray images of patients without having to call them into a special lead-lined room. Professionals with mobile practices or those who work in busy medical facilities with limited room or access to equipment frequently employ portable X-ray machines.

Factors such as an increase in chronic diseases, a rise in the adoption of portable X-ray systems in hospitals, an increase in the geriatric population, and technological advancements in fixed digital X-ray systems are expected to drive segment growth over the forecast period. For instance, during the International Radiology Day conducted in November 2022, the Spanish Society of Medical Radiology (SERAM) revealed that more than 40 million imaging tests are performed each year in Spain to detect or monitor many pathologies. Of these, more than 45% were X-rays. Thus, owing to the rise in the adoption of X-rays for disease diagnosis, the studied segment is expected to foresee notable growth over the forecast period.

Furthermore, rapid technological advancements and various strategic product launches and donations by the key players contribute to segment growth. For instance, in December 2022, Chiesi Spain, the subsidiary of the international biopharmaceutical company, donated Portable X-ray equipment for La Casa de Sofia, the first care center for children with rare diseases, complex chronicity and palliative care in Spain, belonging to the hospital Sant Joan de Deu Barcelona. As a result of this new equipment donation to the center, a smaller number of kids with mild pathologies will need to be transferred to the children's hospital, and medical needs at the diagnostic level will be met. Hence, such strategic donations are expected to increase the utilization and demand for portable digital X-ray systems, thereby fuelling market growth over the study period.

Thus, due to the increase in the adoption of portable X-ray systems and the rise in strategic activities, the studied market is expected to witness significant market growth in the coming years.

Cancer Segment is Estimated to Witness a Significant Market Growth Over the Forecast Period

The cancer segment is expected to witness significant growth in the coming years owing to the increase in the prevalence of cancer, the rise in the adoption of digital X-rays for the detection of various tumors, and technological advances in X-ray equipment. For early cancer diagnosis or to determine whether the disease has progressed to the lungs or other parts of the chest, chest radiography and mammograms are frequently employed. X-rays are used in mammograms to check for tumors or other uncertain breast tissue. According to the estimated report of the Spanish Network of Cancer Registries published in 2023, in women, the most frequent cancer detected is likely to be breast cancer, and 35,005 cases are estimated to be diagnosed in Spain in 2023. Hence, the high prevalence of cancer cases is expected to augment the market growth in Spain over the forecast period.

Furthermore, strategic activities by the key players to improve the digital X-ray platforms in Spain in the field of oncology are expected to bolster segment growth. For instance, in October 2022, Royal Philips collaborated with the Vall d'Hebron Children's

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Hospital to renew its conventional radiology and fluoroscopy equipment with the new Ambient Experience and CombiDiagnost technologies. In this way, the Vall d'Hebron University Hospital became one of the first Spanish hospitals to have Ambient Experience technology in conventional radiology rooms. CombiDiagnost version 90 provides high patient throughput and allows the use of the X-ray room cost-effectively. Also, it offers whole-body X-ray exams with 193 cm coverage. Hence, such initiatives to implement diagnostic services across Spain are expected to benefit cancer diagnosis as well, which is likely to contribute to the market growth over the forecast period.

Spain Digital X-Ray Industry Overview

Spain digital X-ray market is moderately competitive and consists of several major players. Some of the companies that are currently dominating the market are Siemens Healthineers AG, GE Healthcare, Fujifilm Holdings Corporation, Canon (Canon Medical Systems Corporation), and Koninklijke Philips N.V. among others.

Additional Benefits:

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

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