

China CT Scanners Market Assessment, By Type [Stationary CT Scanners, Portable CT Scanners], By Technology [High-Slice CT Scanners, Medium-Slice CT Scanners, Low-Slice CT Scanners, Cone-Beam CT Scanners], By Application [Cardiovascular, Orthopedics, Neurology, Oncology, Others], By End-user [Hospitals, Diagnostic imaging Centers, Others], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

China CT scanners market in medical diagnostics is anticipated to experience a CAGR of 8.00% from 2024 to 2031, increasing from USD 1,536.92 million in 2023 to USD 2,844.73 million by 2031. The market growth is driven by aging population, increased chronic diseases, enhanced imaging technologies, emphasis on early detection of cancers, and improved healthcare services across the country.

The increasing demands in healthcare and the advancement of technology are fueling the growth of the CT scanners market in China. The rising burden of chronic illnesses is a major factor that heightens the demand for advanced diagnostic equipment. With the Chinese population growing older and the middle class expanding, many hospitals are investing in CT scanners due to the high demand for high-resolution medical imaging. The healthcare system is becoming more accessible because of increased insurance coverage and investments being made in the medical infrastructure. Since CT scanners are still set up at almost all major and minor hospitals for diagnosing purposes, the market remains in a growth phase. New product launches, such as ones with low-dose radiation and AI-enhanced imaging, have been drawing the attention of hospitals looking to add the newest equipment to their fleets for better patient care.

Moreover, domestic manufacturers are gathering good momentum by offering cost-effective alternatives to international brands, thus contributing to a highly competitive market. Overall, the modernization of the healthcare sector in China and a gradual rise in hospital acquisitions of CT scanners are driving market growth.

China CT scanners market is being significantly influenced by advancements in artificial intelligence (AI) and machine learning

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technologies. AI-powered imaging solutions are enhancing diagnostic accuracy and workflow efficiency by enabling automated image analysis, lesion detection, and predictive analytics. Additionally, integrating AI with CT scanners improves image reconstruction techniques, reduces scan times, and enhances image quality. Developing advanced software algorithms also enables more precise diagnostics and better risk assessment. Another key advancement is the implementation of cloud-based solutions for data storage and analysis, facilitating remote consultations and collaborative diagnostics. Furthermore, China's focus on increasing domestic manufacturing capabilities and reducing reliance on foreign technology is driving innovation and cost-effectiveness in the CT scanners market. These advancements are collectively contributing to more accurate, efficient, and accessible diagnostic imaging solutions in China.

For instance, in May 2024, Siemens Healthineers AG signed an eight-year strategic collaboration with Xi'an Daxing Hospital to enhance their treatment quality and patient care. Siemens Healthineers AG will be involved in the development of the hospital's departments and the upgrade of imaging facilities, which includes the integration of advanced imaging technology at the 5G Diagnostic and Treatment Center of Xi'an Daxing Hospital. Directly, it will impact the CT scanners market in China since the agreement forms a commitment from Chinese hospitals to advance imaging technologies and infrastructures, hence driving market growth.

Impact of Technological Advancements on China CT Scanners Market

The impact of technological advancements has been acting as a strong positive influence on the CT scanners market in China by way of improvement in diagnostic accuracy and speed. Major facilitators of demand for modern CT systems have been brought about with faster imaging techniques, higher resolution scanners, and the introduction of software for data analysis. Not only does it improve patient outcomes, but it also meets the increasing demand for health services that is being brought about by China's aging population. Utilization of advanced algorithms in CT scanners, like iterative reconstruction helps in delivering lower radiation dose and high-resolution images for the diagnosis of neurodegenerative disorders, which are more prominent in geriatric population.

For instance, in November 2023, Hiroshima University's Department of Diagnostic Radiology signed a collaborative agreement with Canon Medical Systems Corporation and started clinical research studies utilizing Canon Medical's Photon-Counting Computed Tomography (PCCT) system. The two groups started working together on evaluating the clinical value of the data acquired by PCCT, further developing diagnostic information, and perfecting imaging protocols. The Photon-Counting CT is a device that carries a next-generation photon-counting detector to achieve high diagnostic accuracy through X-ray energy analysis based on material differentiation.

Increased Investments in CT Scanners Drive Market Growth

Increased funding for CT scanners in China is one of the leading factors contributing to growth in market demand and driving forces for technological advancement in imaging and making more diagnostic tools available. An investment of this kind leads to accelerated innovation, hence increased demand and improvement in the general health infrastructure, besides commanding a robust CT scanners market that is dynamic. Rising market growth in view of new developments within the medical imaging sector of China is characterized by increasing investments in computed tomography scanners. For instance, Genertec Universal Medical Group (Genertec) took over 85% equity of Case Hendar Medical Technology Wuxi Co., Ltd. (Case Hendar) for USD 65.45 million (RMB 467.5 million), eventually making the latter an indirect subsidiary of the company. Case Hendar's acquisition, whose operations are in Beijing, Shanghai, and Guangzhou, further enforces the management function of medical equipment at Genertec. Besides, Genertec also signed a strategic cooperation agreement with well-known companies such as Philips and Elekta on after-sales service and spare parts.

Moreover, in August 2023, Suzhou-based Kunshan Yiyuan Medical Technology Co., Ltd. closed a Series B financing of USD 14 million (RMB 100 million) led by Everest Venture Capital to further develop its CT X-ray tubes, a key component of a CT scanner. Kunshan Yiyuan Medical has developed CT tubes - 2.0MHU, 3.5MHU, 4.0MHU, 5.3MHU, 6.3MHU, and 8.0MHU, which can match more than 90% of domestic CT equipment. This funding will help Kunshan Yiyuan Medical to expand its production of CT tubes, which can cut China's reliance on imports of CT tubes and further develop local production to support the technological advances of medical imaging in the country.

Similarly, for instance, in September 2023, a Beijing-based medical imaging startup Quantum (Beijing) medical devices co., ltd raised USD 14 million (RMB 100 million) in Series C funding. The funding round was led by China International Capital Corporation,

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with participation from Haixia Capital Management Co Ltd and Shenzhen Guoqi Real Estate Group Ltd. Funding would be used to develop new products, capacity expansion, and operational enhancement. The company manufactures diagnostic imaging solutions including CT scanners, digital radiography, MRI systems, and C-arm systems.

Technology Segment Leads in China's CT Scanners Market Share

The technology segment is likely to dominate the China CT scanners market, resulting from rapid developments in the technologies of the segment and increasing demand for high-performance imaging. For instance, in September 2023, Canon Medical Systems Corporation launched Aquilion ONE GENESIS 640CT with better resolution and efficiency. Manufactured from Canon Medical's Dalian plant, this model speaks volumes about the localized production advantage: quicker response to market demand and confirmation of global quality standards.

The investment represents one milestone in the Chinese medical technology sector, representing very high international standards to the CT scanners market. Thus, the Dalian-based Canon Medical can better answer local needs. Such programs enable local production, whereby it can serve for fast delivery and customization. Initiatives like these even drive the broader diffusion of modern technologies in a region. This growing focus on early diagnosis and personalized medicine increases the demand for high-end imaging modalities. The technology segment will hold a significant share of the market due to the growing demand from healthcare providers for more accurate and timely diagnostic solutions. This constitutes a part of the wider drive toward incorporating advanced technological capabilities into diagnostic and treatment practices with the dual aim of raising the level of diagnostics and care. All these factors make this segment an important driving segment in the CT scanners market in China.

Future Market Scenario (2024-2031F)

The future market scenario of CT scanners in China will show great growth due to innovative technologies, together with governmental support. The Chinese government encourages medical technology development through its policy 'Healthy China 2030' to develop access and quality across the nation. The plan requires a heavy investment in the field of medical imaging technologies in view of the need created by the increasing aging population and the increase in chronic diseases such as cancers and cardiovascular diseases.

Increased emphasis on the localization of high-value medical devices has begun to change market dynamics. The supportive policies towards local innovations reduce the dependence on imports and encourage emergence at a local level. The next important trend is artificial intelligence embedded in medical devices. The government gave significant impetus to the innovations in remote imaging and diagnostics with AI. This, in turn, is improving the capacity and availability of computed tomography systems, most of which are in regional hospitals. Governmental support, local production initiatives, and technological innovations indicate that the China CT scanners market is projected to boom for years to come.

For instance, in May 2023, Shanghai United Imaging Healthcare Co., Ltd. (United Imaging) introduced a whole portfolio of product lineups at the China International Medical Equipment Fair (CMEF), including AI-enhanced PET/CT, PET/MR, MR, CT to DR systems. The two main products developed for this exhibition are a total-body PET/CT system-the uEXPLORER and the uRT-linac 506c. This latter system combines a linear accelerator with a CT imager for highly proficient radiotherapy. The uHOR Cube Integrated Operating Room was fitted out with the most up-to-date advanced imaging and surgical technologies, thus allowing precision surgery. Besides, United Imaging introduced AI platforms, such as uAIFI and uEXCEL, designed to improve imaging performance and safety. This highlights United Imaging's efforts toward improving Diagnostic Imaging in China. Such efforts can fuel the growth of CT scanners in the market.

Key Players Landscape and Outlook

Tremendous demand for China CT scanners could be foreseen with every new technological innovation, coupled with favorable promulgated policies by the government. Leading companies keep the limelight on new technology development with advancements in AI-enhanced imaging, high-resolution scanners, and faster diagnostic capabilities. The key market players are expanding their market presence through strategic partnerships, mergers, and acquisitions, collaborating with local and international players, and enhancing their distribution networks. Also, Government initiatives, such as the 'Healthy China 2030' plan, propose a front toward local manufacturing, reducing dependency on imports further acting as an incentive to the China CT scanners market.

For instance, in April 2024, for celebration of the 89th CMEF, Siemens Healthineers AG and Shanghai Electric Group Co., Ltd. proudly declared that the ultramarine series would make its debut through strategic cooperation, which includes the Ultramarine

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1.5T MRI and Ultramarine 128 and 32 CT scanners. The product launch shows its strategic partnership furthers the "national intelligence innovation" strategy of Siemens Healthineers. Both parties have put a strong focus on intelligent and energy-efficient design, local innovation, and increased cooperation. The partnership was driven by China's "Healthy China 2030" and the "14th Five-Year Plan", which thus lays the foundation for easy access to quality, high-end medical devices contributing to the bigger goal of China in furthering its healthcare industry.

Similarly, in December 2023, GE HealthCare Technologies Inc. introduced its first domestically manufactured ultra-high end CT scanner - Revolution Apex Expert, at the China International Import Expo. This new platform has a high-energy imaging chain that drives the speed of CT to 0.23 seconds, enabling fast heart imaging in 19.5 milliseconds. Production at the Beijing facility of GE HealthCare Technologies Inc. is targeted at fulfilling precise diagnostic needs and positioning for a strategy of local innovation and high-end device promotion.

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