India Digital X-ray Market Assessment, By Product [Stationary Digital Radiology System, Portable Digital Radiology System], By Technology [Direct Digital Radiology, Computed Digital Radiology], By Application [Cardiovascular Imaging, Chest Imaging, Dental Imaging, Digital Mammography, Orthopedic Imaging, Others], By End-user [Hospitals, Diagnostic Imaging Centers, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

India digital X-ray market is projected to grow at a CAGR of 10.13% from FY2025 to FY2032, increasing from USD 342.75 million in FY2024 to USD 741.68 million by FY2032. The market for digital X-rays in India is growing consistently due to an increase in pulmonary tuberculosis and chronic obstructive pulmonary disease burden, the government's vision of the 'Make in India' initiative to increase domestic manufacturing, the growing need for advanced digital technologies, and increased adoption of advanced diagnostic tools for upgrading healthcare infrastructure.

The market of digital X-rays in India has witnessed tremendous growth recently due to evolution in the healthcare sector. Huge investments from the government have helped to shift from traditional, analog X-ray systems towards faster and more efficient digital technology. This progress has accelerated, especially after COVID-19, as the government is putting its best efforts to improve India's healthcare sector by placing more emphasis on the 'Make in India' initiative, which aims to increase domestic manufacturing. The increasing prevalence of diseases like tuberculosis has increased the demand for tools that can offer fast and accurate diagnostics. Government support has been the backbone in promoting the adoption of digital radiography in hospitals and medical centers, thus ensuring quicker processing and more reliable results. The market, therefore, expands since more and more hospitals come in to implement these digital X-ray technologies based on continued developments in medical imaging. This

technology development, in partnership with the government, boasts great promise for the future of developing medical digital imaging in the country. It guarantees effective patient care and diagnosis with further development and growth.
For instance, in June 2024, Fujifilm India Private Limited partnered with NM Diagnostics Pvt Ltd, Mumbai, India and launched its Fujifilm Skill Lab. This fully equipped facility has been developed to provide high-end training in full-field digital mammography (FFDM) to radiologists and radiographers. The first batch comprised eight participants, four radiologists, and four radiographers. The company aims to enhance the skills and further strengthen the lab's diagnostic capabilities by using its best-in-class mammography technology to expand its presence and increase the adoption of digital X-rays.
Increasing Burden of Tuberculosis Impacting India Digital X-ray Market
The increasing burden of tuberculosis in India is one of the major drivers for the growth of digital X-rays in India. India is one of the most affected countries, as reported by the World Health Organization (WHO). According to estimates given by the National Institute of Health, there were about 2.77 million cases of TB that occurred in 2022. The WHO further claims that India accounts for about 27% of the overall burden, which establishes the ranking of the country as one of the leaders in the health crisis. This critical health issue has drastically increased demand for reliable diagnostic imaging equipment, primarily digital X-rays, for the early diagnosis and monitoring of the disease. The Indian government, therefore, is promoting domestic manufacturing of advanced diagnostic equipment. Through indigenous production, the government believes it can promote easier access and more affordable digital X-ray technologies for TB disease, hence improving TB diagnosis and treatment outcomes. This strategic focus not only deals with urgent health needs but also enhances India's ability to develop medical imaging technology. Many companies are forming strategic partnerships to improve their diagnostic capabilities.
For example, in February 2023, Mylab Discovery Solutions Pvt. Ltd., partnered with Qure.ai Technologies Inc. to accelerate and enhance TB diagnosis by utilizing artificial intelligence-powered X-rays. They launched the portable MyBeam X-ray device based on Qure.ai's cutting-edge qXR software that can expedite and advance the accuracy of diagnosis, thereby advancing the screening of high-risk populations and supporting the government's vision of TB elimination by 2025.
Developments in Technology to Propel India's Digital X-ray Market Growth
The recent developments in digital radiography include AI-assisted image interpretation, automatic stitching of the images, dual-energy imaging, and computer-aided diagnostics. These technologies have contributed to enormously improved image quality, hence allowing better patient care and outcomes. Digital radiography also reduced the need for retakes, thereby reducing radiation exposure to patients. These technological advancements have been integrated seamlessly to ensure the attainment of increased adoption rates of digital X-ray technology since its introduction has streamlined and made the imaging process more efficient. Hence, the market experiences significant growth. Improvement in accuracy and a reduction in the procedural complications of these systems has led to further growth, which impacts the general evolution of radiological practices. With the adoption of these latest technologies by medical centers, the influence of these technologies on diagnostics and treatment pathways continues to become overwhelming in this transforming era of medical imaging.
For instance, in February 2022, Carestream Health Inc. (Carestream) launched DRX Compass, a digital radiology solution designed to help radiologists work more efficiently. It has two configurations, which include the floor-mounted and ceiling-suspension and has easily operated functions such as color-coded controls and shared interface with other Carestream products. It also has its ImageView Software which improves security and image preview display, wherein technicians can remain with the patient during the actual radiographic exams, hence shortening the overall time required for conducting such procedures.
Portable X-ray Segment to Register Higher Growth in the Digital X-ray Market
The major growth of the India digital X-ray market is held by the portable digital radiography segment, mainly due to its adaptability and the growing demand in various healthcare facilities. Considering India's vast rural landscape and limited accessibility to conventional imaging facilities, portable X-ray systems are considered the only imperative for timely diagnostics. Such systems, mainly capable of providing quick results directly at the point of care, revolutionize delivery in emergency and field settings.
Government initiatives and investments in healthcare infrastructure, particularly in underserved regions, increase the adoption of this modality. As awareness regarding the advantages of portable digital radiography spreads, healthcare providers are investing in these technologies, thus establishing a significant foothold in the changing geography of India's healthcare. This trend has been invigorated with new product launches. Key players in the country have launched advanced, lightweight portable X-ray systems.

Such systems improve diagnostic accuracy while being connected wirelessly so that data can be transferred directly to a hospital. For instance, in July 2022, a member of Parliament, Kanimozhi, inaugurated a mobile digital X-ray unit costing nearly USD 55,000 (INR 46 lakhs). This is an initiative of the National Tuberculosis Elimination Programme (NTEP), providing free-of-cost high-quality diagnostics and treatments. This is in keeping with the vision of the Tamil Nadu government to make the state 'tuberculosis-free' by 2025.

Future Market Scenario (FY2025-FY2032F)

The future of the digital X-ray market in India is expansive. Advancements in technology are expected to produce high-quality images with lower radiation doses. New techniques can enhance spatial resolution and contrast, leading to more accurate diagnoses. Artificial intelligence integrations are expected to support the analysis of images for radiologists in identifying conditions. Endeavors are still ongoing to design better monitoring systems that will allow further reduction in radiation doses. In addition, portable X-ray units would be further developed to allow bedside imaging and wireless usage. Finally, systems would readily integrate into digital healthcare networks making it easier to share information efficiently, thus improving patient care through better teamwork among providers.

For instance, in December 2023, DeepTek Medical Imaging Private Limited unveiled the Augmento X-ray, the innovative AI-powered solution for chest X-rays. This new technology amplifies the digital capabilities of radiography with advanced computer-assisted detection features. By the integration of artificial intelligence in chest imaging, Augmento X-ray is designed to improve diagnostic accuracy and efficiency and support radiologists in identifying conditions. The optimization of workflows in healthcare settings is also envisioned.

Key Players Landscape and Outlook

India has significant market players in the digital X-ray market. The firms are striving for strategic collaborations with hospitals and diagnostic centers to gain better penetration into the market. Local manufacturing initiative is also aligned with campaigns like 'Make in India'. Key players also work towards training programs for healthcare professionals for proper and optimal utilization of digital X-ray systems for enhancing diagnoses.

In July 2024, Siemens Healthcare Private Limited launched the local production of the Multix Impact E Digital X-ray machine in India, bringing greater access to patient care. According to the Institute for Health Metrics and Evaluation (IHME) 2022 data, the leading causes of death in India include Tuberculosis, Chronic Obstructive Pulmonary Disease, and road injuries, all of which may require X-rays for fractures and chest anomalies. This floor-mounted system is intuitive, offering detailed imaging with significantly reduced exposure to radiation. Manufactured in Bengaluru, it supports secondary care and takes advantage of several years' worth of experience in developing medical imaging systems locally.

Table of Contents:

16.3.1.4.Financials (As Reported)
16.3.1.5.Key Market Focus and Geographical Presence
16.3.1.6.Recent Developments/Collaborations/Partnerships/Mergers and Acquisitions
16.3.2.GE HealthCare Technologies Inc.
16.3.3.Konica Minolta, Inc.
16.3.4.Carestream Health
16.3.5.Koninklijke Philips N.V.
16.3.6.Canon India Pvt Ltd.
16.3.7.FUJIFILM India Private Limited
16.3.8.Shimadzu Medical (India) Pvt. Ltd.
16.3.9.Agfa-Gevaert Group
16.3.10.Allengers Medical Systems Limited
*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.
17.Strategic Recommendations
18.About Us and Disclaimer

India Digital X-ray Market Assessment, By Product [Stationary Digital Radiology System, Portable Digital Radiology System], By Technology [Direct Digital Radiology, Computed Digital Radiology], By Application [Cardiovascular Imaging, Chest Imaging, Dental Imaging, Digital Mammography, Orthopedic Imaging, Others], By End-user [Hospitals, Diagnostic Imaging Centers, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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