

South Africa 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:

South Africa CT scanners market is projected to witness a CAGR of 1.10% during the forecast period 2024-2031, growing from USD 46.73 million in 2023 to USD 51.00 million in 2031. The market is mainly growing under the influence of the rising disease burden and the focus of hospitals on improving their diagnostic capabilities by introducing CT scanners.

Several key determinants are driving the growth of South Africa's CT scanners market, such as an increase in healthcare expenditure, which is leading to the installment of more sophisticated imaging modalities across all hospitals and diagnostic centers. This, coupled with a rising prevalence of chronic diseases, besides a focus on timely and accurate diagnosis, significantly propels the demand for computed tomography scanners. Recent developments in imaging technology, characterized by improvements in resolution and decreases in scanning durations, are significantly driving market growth. Furthermore, favorable governmental policies and financial investments directed at enhancing healthcare infrastructure play a crucial role in this expansion. Moreover, increased public awareness, along with the proliferation of private healthcare establishments, is bolstering the market's progressive trend.

For instance, during 2022-2023, the Technology Innovation Agency (TIA)-funded Cape University Body Imaging Centre at the University of Cape Town (UCT) installed two major imaging systems. It houses 3T Siemens Skyra full-body MRI that scans at high

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resolution for detailed diagnoses and the PET-CT scanner that combines metabolic and anatomical imaging for comprehensive evaluations. Such a facility opens new avenues for research and provides enhanced clinical capability, enabling UCT to maintain its leadership position in innovative medical imaging.

Rising Incidence of Cancer in South Africa

According to the WHO Globocan projections, South Africa has been facing a striking increase in cancer incidence—from an estimated new 111,000 cases in 2022 to an expected 216,000 by 2050. This rise involves major cancers such as those of the breast, prostate, and lungs, hence signaling a rising burden on the health systems. It will necessitate the use of more advanced diagnostic equipment, especially CT scanners, for early detection and planning of effective treatment. With this demand, healthcare providers are driving the significant growth of the CT scanner market in South Africa. Growth will be influenced by the need for better imaging technologies to meet increased volumes of patients and diagnosis complexities. Consequently, investments in CT scanner technology will become pivotal in addressing the rising cancer burden and improving diagnostic capabilities nationwide.

Increased Investments Supports South Africa's CT Scanners Market Growth

The focus of the South African government to develop more accessible healthcare, backed by increased financial resources, is likely to exert a strong influence on South Africa's CT scanner market. For instance, in February 2024, the University of Pretoria's Onderstepoort Veterinary Academic Hospital introduced the largest CT scanner utilized in veterinary medicine in South Africa; this was made possible by a significant donation of USD 0.68 million (R13 million) from the Roy McAlpine Charitable Foundation. Such investments highlight how government and philanthropic funding is directed towards the latest diagnostic technologies. Those investments open more avenues to high-resolution medical imagery and, in turn, push the demand for CT scanners that are ever more advanced. So, with the government continuing to prioritize healthcare spending, especially in diagnostics, South Africa's CT scanner market promises robust growth. This emphasis on technological advancement and diagnostic accuracy reflects the broader movement of improving health outcomes and increasing access to advanced medical facilities in the region.

Hospital Segment is Expected to Account for Major Market Share

Hospitals hold the largest share of South Africa's CT scanner market, driven by their sizeable investment in advanced diagnostic technologies. They lead in terms of the number of installations and in enhancing the imaging capabilities. Medical facilities nationwide are focusing on acquiring and integrating advanced CT technology to manage the increasing demand from patients and improve the accuracy of diagnosis. This can be seen in the continuous improvement of existing machines and the development of new imaging centers. The concentration of computed tomography machines in hospitals indicates their central role in supplying first-class medical services to meet the gradually growing demand for high-quality diagnostic services.

For example, in March 2024, the Lenmed Bokamoso Private Hospital introduced the Aquilion Prime SP CT scanner into the facility to better enhance its medical imaging capabilities. This advanced scanner will come with improved patient throughput and ease of use that combine to deliver greater efficiency. This is a major technological leap that improves the hospital's quality-of-service delivery and sets up South Africa's CT scanner market for more growth and innovation. With healthcare providers working to ensure better outcomes for patients, the proliferation of CT scanners in these institutions would be a sign of the impact these have had on progress within South Africa's medical imaging industry.

Future Market Scenario (2024-2031F)

Medical technology has been advancing rapidly in South Africa, as evidenced by recent major events such as campaigns, conferences, and symposiums to raise awareness among healthcare professionals about advancements in the industry. For example, in November 2023, a joint meeting took place in Cape Town of the Society of African Interventional Radiology and Endovascular Therapy, along with the South African Interventional Society, to expand imaging horizons in South Africa. The strong diagnostic imaging focus for upcoming conferences indicates an increase in awareness and significance of advanced imaging technologies, especially CT scanners, in cancer management.

Medical imaging technologies, including CT scanners, have been utilized significantly, mainly for high-value applications, such as diagnosing and managing cardiovascular and cancer conditions. Thus, the rising target disease population coupled with growing demand for cutting-edge CT instruments are expected to hold promising opportunities in the South African market in the near future.

The delivery and management of good quality and accessible healthcare is one of the critical development challenges in South

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Africa. The sector faces significant challenges, including a high chronic disease rate, inadequate diagnostic facilities, and unequal access to affordable private healthcare services. As AI and digitalization hold promising solutions to overcome these challenges, various start-ups, such as Quro Medical (Pty) Ltd (Quro Medical) and Envisionit Deep AI Pty Ltd, are entering the market. These companies are focusing on fundraising activities to deliver technological developments. For instance, in May 2023, Quro Medical raised an investment of USD 1.5 million (R25 million) from Mineworkers Investment Company (MIC) Pty Ltd. This investment aimed to be utilized by Quro Medical to develop its technology and expand its reach in South Africa's healthcare facilities. Further, integrating artificial intelligence into computed tomography scanners increases their diagnostic efficiency. AI technology applied in image assessment increases the accuracy and speed of diagnosis, hence enabling early detection of disease. This represents a revolution in medical imaging, indicating the substantial growth of South Africa CT scanner market.

Key Players Landscape and Outlook

The key companies operating in the market focus on delivering advanced and innovative high-end imaging technologies and spurring rising demand for diagnostic precision. From technological advancement to strategic collaboration, their diverse contributions continue to make a significant impact on this ever-changing market landscape. This further improves diagnostic capability and healthcare excellence throughout the region.

In September 2023, Diagnostic Radiological Services Inc. (DRS) opened a dedicated CT/PET scanning suite in Gauteng. The facility comprises GE HealthCare Technologies Inc's CT/PET scanner, which represents a significant advancement in imaging capability. This installation highlights the significant position of GE Healthcare within South Africa CT scanners market, demonstrating the organization's dedication to improving diagnostic functionalities and responding to the growing necessity for superior imaging solutions in the area.

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