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China Diagnostic Imaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-08-01 | 68 pages | Mordor Intelligence

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Report description:

China Diagnostic Imaging Market Analysis

The China Diagnostic Imaging Market size is estimated at USD 4.17 billion in 2025, and is expected to reach USD 5.95 billion by 2030, at a CAGR of 7.39% during the forecast period (2025-2030). Robust government support for domestic manufacturing, rapid artificial-intelligence (AI) integration, and policy-driven price reductions are redefining competitive dynamics and expanding access to advanced modalities across urban and rural settings. Domestic innovators such as United Imaging and Neusoft Medical continue to erode the historic dominance of multinational vendors by pairing cost-competitive hardware with AI-enabled workflow tools. Volume-based procurement (VBP) is simultaneously compressing prices and stimulating unit demand, especially in lower-tier counties where penetration remained low until 2024. AI adoption is accelerating workflow efficiency; human-AI collaboration has cut average image-reading time by 27.2% while lifting diagnostic sensitivity by 12% in tertiary hospitals. Together, these forces underpin sustained demand across oncology, cardiology and chronic-disease monitoring segments.

China Diagnostic Imaging Market Trends and Insights

Rise in Prevalence of Chronic Diseases

Non-communicable diseases are expected to cause 93% of all deaths in China by 2050, pushing health planners to expand imaging capacity for early detection and longitudinal monitoring. Older adults already show 66.3% chronic-disease prevalence, reinforcing demand for CT and MRI follow-up exams. Screening policies are broadening; low-dose CT (LDCT) programs now cover

96.95% of high-risk residents within one-hour travel in Sichuan, yet rural adherence still lags at 34.72%. Diabetes point-of-care testing demonstrates cost-effectiveness at USD 185 per QALY in county hospitals, encouraging bundled procurement of portable ultrasound and HbA1c kits. These patterns shift investment away from purely therapeutic infrastructure toward scalable diagnostic fleets.

Growing Geriatric Population

Life expectancy is forecast to hit 82.1 years by 2050, with multimorbidity peaking at 33.7% in the 75-84 cohort, amplifying imaging requirements for cancer, cardiovascular and neurodegenerative surveillance. Coordination between elder-care demand and resource supply improved after 2018 but still trails the growth rate of the senior population, especially in interior provinces. The Healthy China 2030 plan identifies preventive imaging as a cornerstone for managing age-related disease, prompting subsidies for echocardiography and dual-energy CT in community hospitals. Mobile CT buses are increasingly dispatched to remote villages, reducing travel-related care delays. Physician density rose to 30.4 per 10,000 residents in 2024, yet radiologist shortfalls endure, underscoring the need for AI triage tools.

High Acquisition & Lifetime Ownership Costs

Even after VBP discounts, high-end MRI can exceed USD 2 million, straining budgets for tier-3 facilities. Tariffs on premium CT components add up to USD 200,000 per unit, prompting some Chinese firms to relocate supply chains to ASEAN markets. Order deferrals by major hospitals in 2024 led Siemens Healthineers and GE HealthCare to report mid-single-digit revenue declines, underscoring procurement cyclicality. Provincial efficiency studies reveal persistent capital-allocation disparities, with western regions averaging a 0.979 efficiency score versus near-unity in coastal areas.

Other drivers and restraints analyzed in the detailed report include:

Increased Adoption of Advanced Imaging Technologies / Government Equipment-Upgrade Subsidies & DRG Roll-Out / Radiation / Contrast-Agent Safety Concerns /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

X-ray maintained the largest share of the China diagnostic imaging market at 27.53% in 2024, reflecting its affordability and entrenched presence in primary-care clinics. Computed tomography, fueled by iterative reconstruction and photon-counting upgrades, is forecast to post the segment-leading 8.87% CAGR, capturing oncology and cardiovascular demand in county hospitals. Digital radiography migration continues as older analog units phase out under government subsidy schemes. Meanwhile, PCCT pilot sites report 40% radiation-dose savings and sharply improved bone-microstructure visualization, positioning CT as a credible challenger for high-volume orthopedic exams.

Portable ultrasound and handheld X-ray units complement fixed modalities in outreach programs, underscoring a dual-track deployment model. Nuclear medicine retains a niche but strategic role; 1,200 hospitals run gated SPECT or PET studies for 3.9 million patients annually, with domestic radio-isotope supply gradually improving. MRI vendors pursue helium-free systems to ease rural installs, while AI-enabled fluoroscopy automates dose-rate modulation during interventional procedures. Together, these upgrades solidify a broad modality mix to serve heterogeneous clinical settings across the China diagnostic imaging market.

Fixed rooms still account for 81.74% revenue, reflecting entrenched procurement in tertiary hospitals where high-slice CT and 3 T MRI command premium prices. Yet mobile and handheld systems are forecast to expand at an 8.92% CAGR, propelled by rural-health mandates and VBP affordability. Health All-in-One kiosks integrating low-dose X-ray, ECG, and ultrasound have proven effective in Hainan pilot sites, driving double-digit patient-volume gains.

Domestic innovators now offer battery-powered handheld CT for emergency medicine and ambulance use, widening point-of-care boundaries. Tele-radiology frameworks built on 5G and edge-computing platforms ensure that images captured in township clinics reach city radiologists in under 60 seconds, offsetting workforce shortages. As a result, mobile systems are poised to capture incremental volumes without cannibalizing high-end fixed installations, adding breadth to the China diagnostic imaging market size.

The China Diagnostic Imaging Market Report is Segmented by Modality (MRI, CT, Ultrasound, X-Ray, Nuclear Imaging, Fluoroscopy, Mammography), Portability (Fixed Systems, Mobile and Hand-Held Systems), Application (Cardiology, Oncology, Neurology, Orthopedics, Gastroenterology, and More), End User (Hospitals, Diagnostic Imaging Centres, Other End-Users), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

United Imaging Healthcare / GE Healthcare / Siemens Healthineers / Koninklijke Philips / Canon / Mindray / Wandong Medical / SonoScape / Neusoft / Shenzhen Anke High-tech / Carestream Health / Hologic / Shimadzu / Samsung Group / Esaote / AllTech Medical Systems / MinFound Medical / PI Medical Diagnostic Equipment / Shenzhen Mindeye 3D (Hand-held CT) / Tencent YouTu (AI SaaS) /

Additional Benefits:

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

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