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

Market Report | 2025-06-01 | 70 pages | Mordor Intelligence

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Report description:

Italy Diagnostic Imaging Equipment Market Analysis

The Italy diagnostic imaging equipment market size is estimated at USD 1.43 billion in 2025, and is expected to reach USD 1.87 billion by 2030, at a CAGR of 5.51% during the forecast period (2025-2030). Capacity upgrades financed by the National Recovery and Resilience Plan (PNRR) and private-sector investments are accelerating equipment replacement cycles and digital connectivity. Demand is reinforced by population aging, the high burden of oncological and cardiovascular diseases, and progressive adoption of artificial intelligence (AI) for image interpretation. Vendors respond with photon-counting CT, open-architecture MRI, and mobile X-ray systems that shorten exam times and fit emerging point-of-care workflows. Regional convergence policies and uniform national tariffs introduced in 2025 are expected to lift procedure volumes in historically underserved Southern provinces, while the hospitality of Italy's sprawling private diagnostics network continues to attract self-pay and cross-border patients.

Italy Diagnostic Imaging Equipment Market Trends and Insights

Demographic Aging and Escalating Chronic-Disease Incidence

Citizens aged ?65 are expected to climb from 24% to 34% by 2050, driving multi-modality follow-up for cancers, heart disease, and musculoskeletal conditions. Hospital radiology departments report increasing examination complexity that favors higher-throughput CT scanners, wide-bore MRI, and iterative reconstruction software. Workflow automation and patient-comfort features gain priority as frail patients require longer positioning times. Vendors that combine low-dose protocols with rapid image reconstruction gain a competitive edge in the Italy diagnostic imaging equipment market.

Large-Scale Government & EU Recovery Funding for Healthcare Modernization

The PNRR sets aside funds to replace 3,100 legacy systems and digitalize 280 emergency departments, triggering a concentrated equipment buying cycle that benefits premium vendors able to guarantee cyber-secure interoperability. Southern hospitals receive above-average budget shares, narrowing the historic North-South technology gap. Public tenders favor systems offering AI-ready architectures, remote service diagnostics, and energy-saving standby modes, reinforcing high-spec replacements across the Italy diagnostic imaging equipment market.

High Cost of Imaging Equipment & Procedures

Out-of-pocket healthcare spending rose 10.3% in 2023, and 4.5 million citizens skipped care due to cost. Capital budgets in smaller hospitals lag behind recommended five-to-seven-year replacement cycles, suppressing demand for high-end MRI and hybrid scanners. Service contracts, software upgrades, and energy costs compound financial strain, limiting purchasing power in parts of the Italy diagnostic imaging equipment market.

Other drivers and restraints analyzed in the detailed report include:

Rapid Technological Breakthroughs in Multimodal Imaging / Rising Uptake of Point-of-Care, Portable and Mobile Imaging Platforms / Lengthy Regulatory, Reimbursement and Public-Tender Procedures /

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

Segment Analysis

X-ray retained 30.84% share in 2024, underpinned by universal clinical use and economical operating costs. Digital radiography upgrades continue to replace film systems, securing steady replacement demand within the Italy diagnostic imaging equipment market. Advanced detectors and dose-reduction algorithms enhance image quality while easing regulatory compliance.

MRI, however, is set to grow at a 7.28% CAGR as open-bore systems reduce claustrophobia and 3 T platforms shorten scan times. Esaote's Magnifico Open drove a 3.3% sales increase in 2023. Neuro-oncology, musculoskeletal sports injuries, and cardiac viability studies widen clinical indications, elevating the MRI slice of the Italy diagnostic imaging equipment market size for hospital and private settings alike.

Fixed units held 81.79% of 2024 revenues, anchored by high-throughput CT, MRI, and angio suites that integrate with PACS and hospital information systems. PNRR budgets prioritize like-for-like replacements, ensuring short-term stability in this segment of the Italy diagnostic imaging equipment market.

Mobile and handheld devices are scaling at 6.92% CAGR. Wireless ultrasound probes and wheeled DR carts support surge capacity in ICUs and emergency departments. Their flexibility aligns with evolving care models such as hospital-at-home, expanding the Italy diagnostic imaging equipment market share for vendors that optimize weight, battery life, and image quality.

The Italy Diagnostic Imaging Equipment Market Report is Segmented by Modality (MRI, Computed Tomography, Ultrasound, X-Ray, Nuclear Imaging (PET / SPECT), Fluoroscopy and Mammography), Portability (Fixed Systems and Mobile and Hand-Held Systems), Application (Cardiology, Oncology, Neurology, and More), and End-User (Hospitals, Diagnostic Imaging Centres, and

More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Siemens Healthineers / Koninklijke Philips / GE?Healthcare / Canon / FUJIFILM / Esaote / Italray / Gilardoni SpA / Hologic / Carestream Health / Agfa-Gevaert / SAMSUNG (SamsungHealthcare.com) / Shimadzu / Mindray / Bracco / GMM Group / Villa Sistemi Medicali Spa / Guerbet SA /

Additional Benefits:

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

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