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

Market Report | 2025-06-01 | 85 pages | Mordor Intelligence

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Report description:

Netherlands Diagnostic Imaging Equipment Market Analysis

The Netherlands Diagnostic Imaging Equipment Market size is estimated at USD 622.24 million in 2025, and is expected to reach USD 764.87 million by 2030, at a CAGR of 4.21% during the forecast period (2025-2030). Robust public spending-healthcare outlays rose 8.1% in 2024 to EUR 5,871 per capita-gives hospitals and specialist centers scope to refresh ageing fleets and pilot AI-ready platforms. A EUR 1.7 billion Digital Europe allocation for AI, data and cloud (2025-2027) is already funnelling grants to university medical centers, accelerating early adoption of photon-counting CT, helium-free MRI and autonomous X-ray suites. High utilisation rates underscore entrenched demand from oncology screening, cardiac follow-up and precision-medicine protocols. Meanwhile, workforce shortages and stricter sustainability rules spur interest in portable, low-dose and energy-efficient systems, giving vendors that bundle AI workflow tools and helium-saving designs a competitive edge.

Netherlands Diagnostic Imaging Equipment Market Trends and Insights

Rise in Prevalence of Chronic Diseases

Cardiovascular and oncologic illnesses jointly cause 51% of deaths, and the Netherlands performs 49.9 MRI plus 70.7 CT scans per 1,000 residents yearly, surpassing most EU peers. Outpatient pharmaceutical spending jumped 7% in 2024, mirroring a pivot to targeted drugs that require frequent imaging to monitor efficacy. Precision-medicine regimens make advanced modalities indispensable for tracking lesion response and drug toxicity. An ageing demographic magnifies repeat-scan volumes as chronic conditions progress. Policy shifts toward early detection channel a sizeable share of the EUR 109.4 billion health budget into imaging capacity upgrades.

Technological Advancement in Imaging Modalities

Thirty-six percent of Dutch radiology chiefs have operational AI tools and another 35% will deploy them by 2028. Photon-counting CT halves radiation while enhancing contrast, matching the patient-safety ethos embedded in national guidelines. Helium-free MRI such as the Magnetom Flow uses under 1% of legacy cryogen volumes, trimming running costs and aligning with green procurement targets. Deep-learning reconstruction cuts CT dose by 91.2% for lung-nodule programmes, and GE HealthCare's tie-up with NVIDIA is pushing autonomous X-ray and ultrasound units onto Dutch trial sites. Together, these advances raise throughput, counteract radiologist shortages and improve diagnostic confidence.

Expensive Procedures & Equipment

Hospital capital budgets continue to tighten even as overall health expenditure grows, forcing boards to stretch replacement cycles. Monthly insurance premiums hit EUR 156 in 2025, sparking public scrutiny of big-ticket MRI or PET investments. Consequently, facilities increasingly favour pay-per-scan leases and multi-vendor service contracts. Philips' renewed deal with Isala Hospital showcases a shift toward outcome-based pricing tied to uptime and dose metrics. Rental and managed-service models now cover USD 545 million of European imaging, rising 7% annually, underscoring a broader move from capital to operational spend.

Other drivers and restraints analyzed in the detailed report include:

Rapidly Ageing Population Demanding Early Diagnosis / Shift Toward Low-Dose Protocols & Radiation-Free Modalities / Radiologist Workforce Shortages Limit Throughput /

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

Segment Analysis

X-ray systems captured 28.33% of the Netherlands diagnostic imaging equipment market size in 2024, cementing their role for trauma and bedside exams. MRI, however, is advancing at a 6.16% CAGR, buoyed by helium-free magnets, silent sequences and AI-assisted motion correction that shorten table times. Photon-counting CT gains share for oncology staging and paediatric cases, delivering ultra-low-dose clarity prized by regulators committed to patient safety. Ultrasound adoption widens with handheld probes that sync to cloud PACS, enabling immediate consults. Nuclear-medicine platforms retain a foothold in theranostic oncology, while AI-guided mammography raises breast-screening sensitivity. Together, these shifts diversify revenue streams yet keep X-ray at the core of high-volume workflows.

Sustainability pressures steer hospitals toward energy-efficient hardware, making Siemens' Magnetom Flow-using just 7 litres of helium-an attractive MRI upgrade. GE HealthCare's manganese-based contrast agent pipeline addresses environmental concerns over gadolinium, potentially opening new MRI indications. Vendors embedding deep-learning reconstruction across CT, MRI and PET benefit from dose cuts and faster scans, enabling throughput gains critical amid staffing constraints. As such, modality mix decisions weigh image quality, sustainability compliance and AI readiness alongside cost.

Fixed installations held 81.72% of the Netherlands diagnostic imaging equipment market share in 2024, reflecting hospitals' need for high-spec scanners that integrate with surgical and intensive-care workflows. Mobile and handheld units, though smaller in absolute revenue, expand at 5.89% CAGR as point-of-care protocols become mainstream. The pandemic normalised bedside ultrasound and corridor CT, prompting procurement teams to allocate budget for portable complements rather than replacements. Ambulatory surgery centres now deploy mobile C-arms to sidestep limited booking slots in central radiology.

Evolving reimbursement models that reward same-day discharge further fuel demand for nimble imaging. Philips' Zenition 90 C-arm exemplifies premium features in a roll-in format that supports orthopaedic and vascular interventions. Start-ups like Chipiron target community sites with low-field portable MRI that shares images via cloud PACS, trimming travel for elderly patients. Combined with AI-powered auto-positioning and dose alerts, mobile systems promise productivity boosts that justify higher per-scan fees.

The Netherlands Diagnostic Imaging Market Report is Segmented by Modality (MRI, Computed Tomography (CT), Ultrasound, X-Ray (Digital & Analog), Nuclear Imaging (PET / SPECT), and More), 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:

Canon / Carestream Health / Esaote / FUJIFILM / GE Healthcare / Mindray / Hologic / Koninklijke Philips / Shimadzu / Siemens Healthineers / SAMSUNG (SamsungHealthcare.com) / Agfa-Gevaert / United Imaging Healthcare Co., Ltd. / Neusoft / Sectra / Ziehm Imaging / Esaote Benelux B.V. / Planmed /

Additional Benefits:

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

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