

## **Saudi Arabia Diagnostic Imaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-08-01 | 75 pages | Mordor Intelligence

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### **Report description:**

Saudi Arabia Diagnostic Imaging Market Analysis

The Saudi Arabia Diagnostic Imaging Market size is estimated at USD 419.11 million in 2025, and is expected to reach USD 539.69 million by 2030, at a CAGR of 5.19% during the forecast period (2025-2030). This expansion reflects steady capital inflows triggered by Vision 2030, the privatization of public hospitals, and mounting demand for high-resolution modalities that address the Kingdom's chronic-disease burden. Ongoing AI adoption, increased health-insurance penetration, and an 84,000-bed capacity goal further elevate equipment procurement, while image-exchange networks and virtual hospital initiatives accelerate scan volumes by linking 224 facilities to central radiology hubs. At the same time, the market wrestles with radiologist shortages, device-approval delays, and cybersecurity mandates, factors that temper the growth trajectory but also open niches for teleradiology and autonomous-workflow vendors.

Saudi Arabia Diagnostic Imaging Market Trends and Insights

Rising Incidence of Chronic Diseases

Cardiovascular disorders and diabetes affect nearly 70% of the Saudi population, driving persistent demand for cardiac CT, echocardiography, and liver ultrasound screenings that underpin long-run growth in the Saudi Arabia diagnostic imaging market. Dedicated chronic-disease centers in Riyadh and Jeddah continuously acquire mid-tier CT scanners for rapid throughput, while AI protocols at King Faisal Specialist Hospital cut cardiac MRI turnaround by 33% and have been replicated at six tertiary facilities

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nationwide. Mobile X-ray fleets deployed under rural e-health programs extend preventative imaging to remote provinces, creating incremental scan volumes that flow back to central reading hubs. Demographic aging toward a projected 45 million residents by 2030 sustains volume growth across all modalities, reinforcing the modality-refresh cycle. Mandatory ISO 13485:2016 conformance pushes providers to standardize QC workflows as equipment fleets expand.

#### Government Vision 2030 Healthcare Investment Surge

A USD 66.6 billion public-health outlay in 2025 accelerates procurement pipelines for CT, MRI, and hybrid PET/CT systems, positioning the Saudi Arabia diagnostic imaging market for mid-single-digit annual expansion. Privatization of 290 hospitals and 2,300 PHCs hands purchasing authority to new operators eager for AI-ready scanners, while NEOM's USD 500 billion life-science district serves as a testbed for digital-twin diagnostic suites. Streamlined tenders led by NUPCO shave months from acquisition cycles, and bundled service contracts now cover training, cybersecurity, and dose-optimization analytics, reducing total cost of ownership and speeding adoption.

#### High Cost of Diagnostic Imaging Equipment

A 3 Tesla MRI unit can exceed USD 3 million, while 128-slice CT systems hover near USD 2 million, expenditures that constrain capex-light providers and prolong ROI cycles within the Saudi Arabia diagnostic imaging market. Service agreements add 8-12% annually to ownership costs, and local-content directives oblige OEMs to embed domestic supply percentages, nudging prices upward. Semiconductor shortages have lengthened lead times for detector arrays, delaying installation by up to six months for Tier-2 buyers. Consequently, mid-tier providers gravitate toward refurbished scanners and software upgrades, a tactic that tempers near-term market revenue yet fosters an aftermarket for maintenance and AI overlays.

Other drivers and restraints analyzed in the detailed report include:

Increased Adoption of Advanced Imaging Technologies / Nationwide Image-Exchange Interoperability Projects / Shortage of Skilled Radiologists & Technicians /

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

#### Segment Analysis

X-Ray retained 29.01% of the Saudi Arabia diagnostic imaging market share in 2024, anchored by trauma-care demand and universal availability in public and private EDs. Legacy DR rooms are undergoing flat-panel upgrades that boost throughput by 20%, while dose-tracking software supports pediatric safety compliance. Ultrasound, projected to grow at a 6.97% CAGR, benefits from handheld probes integrated with 5G tablets that enable point-of-care scans in ambulances and field clinics. Research-grade liver-ultrasound datasets assembled in Riyadh feed local AI liver-fat quantification tools, widening clinical use cases.

MRI expansion centers on 3 Tesla installations that elevate neuro-oncology diagnostics, whereas CT gains from ED triage protocols mandating whole-body trauma CT within 45 minutes. PET/CT volumes escalate in oncology centers that now manage 50,000 new cancer cases annually. Across modalities, AI decision-support layers produce time savings of 25-40 minutes per study, reinforcing the upgrade cycle in the Saudi Arabia diagnostic imaging market.

Fixed Systems command an 80.84% market share in 2024, reflecting the substantial infrastructure investments in major medical cities and the technical requirements of high-end imaging modalities that require dedicated installation environments. The dominance of fixed systems aligns with the Kingdom's strategy of establishing centers of excellence within major hospitals, where advanced MRI, CT, and nuclear imaging systems provide comprehensive diagnostic capabilities for complex cases.

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However, mobile and hand-held systems should clock a 6.52% CAGR as policy shifts push imaging toward community clinics. Bedside MRI and battery-powered X-ray carts cut ICU transport risks and free scanning slots for scheduled outpatients. The Healthcare Sandbox program expedites approvals for portable prototypes, shortening commercialization from 18 to 9 months. These mobility gains elevate scan penetration in Northern provinces, nudging total exam volumes and expanding the Saudi Arabia diagnostic imaging market beyond metropolitan strongholds.

The Saudi Arabia Diagnostic Imaging Market Report is Segmented by Modality (MRI, Computed Tomography, Ultrasound, X-Ray, Nuclear Imaging, Other Modalities), Portability (Fixed Systems, Mobile and Hand-Held Systems), Application (Cardiology, Oncology, Neurology, Orthopedics, Gastroenterology, and More), and End User (Hospitals, Diagnostic Imaging Centers, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

GE Healthcare / Siemens Healthineers / Koninklijke Philips / Canon / FUJIFILM / Agfa-Gevaert / Esaote / Shimadzu / Fonar Corp. / Hologic / Hitachi Healthcare / United Imaging Healthcare / Mindray Bio-Medical Electronics / Samsung Group / Carestream Health / Planmed / Neusoft Medical Systems / Guerbet Group (Contrast & AI) / Sectra AB (PACS/Teleradiology) /

Additional Benefits:

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

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