Brazil Diagnostic Imaging Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 90 pages | Mordor Intelligence

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Report description:

Brazil Diagnostic Imaging Equipment Market Analysis

The Brazil Diagnostic Imaging Equipment Market was valued at USD 1.31 billion in 2025 and estimated to grow from USD 1.38 billion in 2026 to reach USD 1.82 billion by 2031, at a CAGR of 5.58% during the forecast period (2026-2031). The upbeat outlook mirrors Brazil's position as Latin America's largest healthcare arena, where public-sector funding climbed 46% year on year to R$ 218 billion in 2024, creating a sizeable replacement cycle for outdated analog systems and encouraging higher capital expenditure on advanced modalities. High chronic-disease prevalence, an aging population, expanded private insurance uptake, and streamlined ANVISA rules foster wider equipment penetration, while digital health initiatives stimulate migration to AI-ready platforms and workflow software that improve image throughput and reduce technician workload. Industry leaders accelerate product localization and cloud-based aftermarket services to manage the country's import dependency and currency volatility, while domestic innovators gain traction by tailoring portable ultrasound and AI triage solutions to remote regions with few radiologists.

Brazil Diagnostic Imaging Equipment Market Trends and Insights

Growing Burden of Chronic Diseases

Cardiovascular conditions remain Brazil's top mortality cause, while the five most common cancers now form nearly one half of new cases, pushing continuous demand for multi-slice CT, PET/CT and cardiac ultrasound platforms that refine staging and risk stratification. AI triage and image-sharing networks enable over-burdened radiology departments to handle higher study volumes without proportional staff growth. Regional incidence variability, such as rising prostate cancer in Mato Grosso, forces providers to scale modality mix to local epidemiology. Mobile lung-screening programs like ProPulmao display how low-dose CT vehicles can extend oncologic imaging to underserved smokers in resource-poor municipalities. Public and private hospitals consequently adjust equipment budgets toward advanced hybrids and iterative-reconstruction software that shorten scan times and lower dose.

Demographic & Epidemiologic Shift Toward Aging Population Raising Imaging Demand

Life expectancy has recovered to 77.4 years for women and 70.2 years for men, and elders consume far more diagnostic studies for oncologic, neurologic, and musculoskeletal disorders. Urban facilities wrestle with a backlog as scan referrals multiply, whereas rural regions face outright service absence because one-third of Health Regions still lack key imaging procedures. The shortfall encourages the procurement of compact MRI and portable ultrasound units that operate on limited infrastructure. Private insurers covering 25% of Brazilians work with outpatient centers to shorten wait times, often leasing vendor-managed equipment to sidestep ample cash outlays and speed adoption of AI-assisted protocols that condense exam slots and improve throughput.

High Up-front Capital Costs & Long ROI Horizons for Smaller Hospitals

Acquisition prices for 1.5 T MRI or 128-slice CT often exceed USD 1 million, a threshold out of reach for many interior hospitals that also face SUS reimbursement ceilings, which elongate payback to beyond seven years. The R$ 250 million fund launched by Ouro Preto Investimentos offers vendor-neutral leaseback schemes, but adoption remains modest outside large cities. Several Health Regions, therefore, run without stroke-ready CT, forcing patient transfers that inflate clinical risk and erode ROI for prospective buyers. Refurbished imports help, yet equipment age raises downtime risk and upgrade incompatibility, perpetuating cycle lags within the Brazil diagnostic imaging equipment market.

Other drivers and restraints analyzed in the detailed report include:

Digital Transformation of Healthcare Stimulating Replacement of Legacy Analog SystemsDecentralized Care & Telemedicine Catalyzing Mobile / Point-of-Care Imaging AdoptionShortage of Skilled Professionals

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

Segment Analysis

The Brazil diagnostic imaging equipment market size for X-ray systems commanded 22.05% in 2025 and remained the entry-level workhorse in public and private clinics. MRI is set to rise at a 7.62% CAGR given oncology follow-up, multiple-sclerosis monitoring and cardiac viability mapping.

Portable ultrasound scales fast in antenatal programs while fluoroscopy-C-arm combos like Siemens Luminos Q.namix attract surgical centers seeking unified low-dose interventional suites. Hybrid PET/MRI broadens breast and cervical staging, signaling a future high-margin niche. Nuclear medicine lags broader adoption due to radioisotope logistics, but gains impetus from expanding oncology centers, which boosts the overall Brazil diagnostic imaging equipment market.

Fixed installations still furnish 81.62% of Brazil diagnostic imaging equipment market share because high-field magnet and multi-row CT siting needs tie them to anchor hospitals. Mobile and handheld systems will post 6.92% CAGR as teleradiology coverage and state-financed screening trucks fill regional accessibility gaps. Mobile imaging solutions become particularly critical for cancer screening initiatives like the ProPulmao project, utilizing mobile low-dose computed tomography units to reach high-risk populations in limited resource regions.

Wireless ultrasound probes from Mobissom and truck-mounted MRI from Resonandina display how vendors tailor form factors to Brazil's long-distance referral patterns. The success of UBS+Digital incentivizes primary-care clinics to add compact DR panels connected to cloud PACS, advancing decentralization and sustaining double-digit unit growth in portable categories of the Brazil diagnostic imaging equipment market.

The Brazil Diagnostic Imaging Equipment Market Report is Segmented by Modality (X-Ray, Ultrasound, Computed Tomography, MRI, Nuclear Imaging (PET/SPECT), Fluoroscopy & C-Arms, Mammography), Portability (Fixed Systems, Mobile & Hand-Held Systems), Application (Oncology, Cardiology, Neurology, and More), and End-User (Hospitals, Diagnostic Imaging Centers, Specialty Clinics). 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 Holdings Corp. Carestream Health Hologic Shimadzu Esaote SAMSUNG (SamsungHealthcare.com) Agfa-Gevaert United Imaging Healthcare Neusoft Konica Minolta Healthcare Mindray

Additional Benefits:

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

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