Executive Summary

The table below presents a summary of the key metrics for diagnostic X-ray imaging in 5EU during the forecast period from 2011–2020.

| Diagnostic X-ray Imaging Key Metrics in the 5EU: Key Events and Pipeline Assessment, 2011–2020 |
|----------------------------------------------|-----------------------------------------------|
| 2012 Market Sales ($m)                        | $764.4                                        |
| 5EU                                           |                                               |
| Key Events (2011–2020)                        | Level of Impact                               |
| Konica Minolta signs global distribution agreement with GE Healthcare (2013) | ↑↑                                            |
| Varian Medical Systems acquires InfiMed (2012) | ↑                                             |
| Pipeline and Competitive Landscape Assessment  |                                               |
| Total pipeline products profiled             | 6                                             |
| Total marketed products profiled             | 12                                            |
| Total companies profiled                     | 18                                            |
| 2020 Forecast Market Sales ($m)               | $1,179.0                                      |
| 5EU                                           |                                               |

Source: GlobalData, based on primary research interviews with leading radiologists in 5EU.

5EU = France, Germany, Italy, Spain, and UK.

Market Overview

GlobalData estimates that the European Union (EU) diagnostic X-ray imaging market, worth $764.4m in 2012, will reach $1.2 billion by 2020, increasing at a Compound Annual Growth Rate (CAGR) of 5.6% during the forecast period. Many players are active in this market, and the key drivers for increased revenue in the EU diagnostic X-ray imaging market are:

- Increased demand for cost-effective and quality healthcare
- Implementation of picture archiving and communication systems/radiology information systems (PACS/RIS) worldwide
- Increased patient awareness regarding excessive radiation exposure associated with computed tomography (CT) imaging
- Implementation of digital tomosynthesis (DT) to reduce costs and exposure to ionizing radiation compared with advanced imaging technologies
- Monitoring applications of diagnostic X-ray imaging
- Digital mobile radiography systems

The key barriers in the EU diagnostic X-ray imaging market are:

- Growing gap between the supply of and demand for radiologists
- Advanced imaging modalities, which inhibit the growth of X-ray imaging
- Lack of enthusiasm surrounding X-ray imaging and shrinking radiology training
- Increasing prevalence of lifestyle-related diseases
- Reduced hospital budgets
- Trend in hospital consolidation
- Impact of the medical device excise tax
The EU X-ray imaging market is a moderately growing market with a CAGR of 5.6%. It is a mature sector of the diagnostic imaging market, and its growth is primarily attributable to replacement of systems rather than new installations, facilitated by the recovering economies in this region.

Future Outlook

The economic downturn has been an ongoing concern within the diagnostic imaging market; even though the X-ray imaging market is susceptible to economic downturns, this downturn has affected this market only partially, as these systems are less capital-intensive than other diagnostic imaging modalities. However, since the X-ray imaging market is a mature one, its growth in developed markets such as the EU is limited due to saturation in the presence of these systems, which, in turn, limits the amount of growth that can be experienced in these regions.

The market growth for X-ray imaging in the EU is heavily dependent on the replacement of existing systems because, as is the case in most of the developed countries, the capacity for new installations is limited. As the EU economies recover, it can be expected that the equipment will be replaced. However, at this point in time, the key opinion leaders (KOLs) who GlobalData interviewed for this report indicated that not all equipment is replaced at the end of the average product lifecycle, which negatively affects new product sales in the 5EU markets.

The rising prevalence of disease, an aging population, and an escalating global population will act as major drivers of the increased use of diagnostic X-ray imaging. In addition, cost-containment measures implemented by healthcare authorities will favor diagnostic X-ray imaging over the other, more expensive techniques, such as magnetic resonance imaging (MRI) and CT, when appropriate clinical questions arise more frequently.

What Do Physicians Think?

The KOLs interviewed for this report agreed that in terms of technological development, current diagnostic X-ray imaging seems to have reached a plateau, and major breakthrough technologies have not been introduced into this market in a long time. However, the KOLs expressed enthusiasm over mobile digital radiography solutions.

“There is quite a lot of development going on in mobile units, and that will change quite drastically, I think, into the next decade.”

Key Opinion Leader

The KOLs believe that due to the comparatively inexpensive nature of X-ray imaging procedures, they will continue to be performed, and at all levels of hospitals and clinics. In addition, X-ray imaging is an irreplaceable diagnostic tool because of its low cost and ease of use.
Executive Summary

“X-ray [imaging] will not be replaced by any other technology because of its low price and ease of use.”

Key Opinion Leader

The KOLs also indicated that the lack of enthusiasm surrounding X-ray imaging as opposed to more advanced techniques, such as MRI and CT, is unfavorable and might negatively affect the use of this technique in the future.

“I have to say that I’m also the editor-in-chief of a radiological journal, [and] we [do not] receive a huge amount of manuscripts from conventional radiography because no one cares about it. You know, all people want to publish [is] their research into CT and MRI.”

Key Opinion Leader

KOLs highlighted that the use of X-ray imaging has seen a decline since the advent of advanced imaging modalities, and this trend is likely to continue.

“A plain X-ray is just a two-dimensional structure, if you think about it. We are all 3D; plain X-ray just gives you a flat image…. [A] CT scan lets you look at inside of the body, as opposed to just a flat situation.”

Key Opinion Leader

“We have cut back [the use of plain X-rays] at least by two thirds; we now do CTs instead, and then we reconstruct them….If they want to look at clavicles, we reconstruct the clavicles.”

Key Opinion Leader

“Nobody’s doing a research paper on X-ray imaging. That is absolutely true….They like the [alluring] modalities like the CTs and MRIs, but from a technical perspective, the hardest thing to actually read is an X-ray.”

Key Opinion Leader
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2 Introduction

An early diagnosis of disease is the foundation for increasing survival rates. Diagnostic X-ray imaging is the most widely used technique to achieve early detection and clinical assessment of adult and pediatric patients alike, making it a cornerstone of disease control. This report provides an analysis of the diagnostic X-ray imaging market in the 5EU (France, Germany, Italy, Spain, and the UK), and identifies the unmet needs in this diagnostic X-ray systems market. This report also discusses physician attitudes towards the utilization and perception of different types of X-ray imaging techniques, and the future of diagnostic X-ray imaging in the face of rapid technological advancements and other advanced imaging modalities.

2.1 Catalyst

In the past, slow economic growth has hindered the growth of the diagnostic X-ray imaging market. However, with the increasing prevalence of diseases, an aging population, and the demand for better healthcare, even in remote areas, there has been an increased need for diagnostic X-ray imaging, as it is considered a prerequisite in radiology services. This report focuses on the current and future industry trends within the diagnostic X-ray imaging market, in addition to discussing the promising pipeline products and assessing the competitive landscape. This report also highlights the current and future applications of diagnostic X-ray imaging, and evaluates the drivers and barriers faced by this industry. Finally, the report identifies the unmet needs within the diagnostic X-ray imaging market and discusses them in detail.

2.2 Related Reports


- GlobalData (2013). MediFocus: Future of Molecular Imaging, August, 2013, GDME002MFR

11.9 About GlobalData

GlobalData is a leading global provider of business intelligence in the healthcare industry. GlobalData provides its clients with up-to-date information and analysis on the latest developments in drug research, disease analysis, and clinical research and development. Our integrated business intelligence solutions include a range of interactive online databases, analytical tools, reports, and forecasts. Our analysis is supported by a 24/7 client support and analyst team.

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