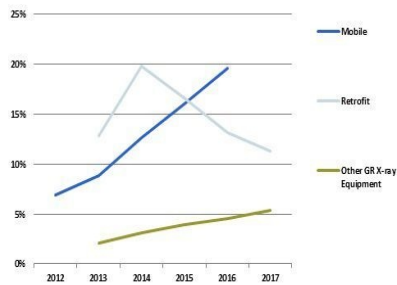




## Mobile Upgrades to Drive Global X-ray Market

IHS Forecast: Global Market for General Radiography X-ray Equipment (Revenue Growth Profile)



Other X-ray Equipment includes Charged Couple Device (CCD), Flat Panel Detector, Conventional Analogue and Computed Radiography

Source: IHS Inc.

Demand for mobile X-ray and retrofit upgrade kits is driving strong growth in the global X-ray market, according to a new report “The World Market for General Radiography and Fluoroscopy X-ray Equipment – 2013” from IMS Research, now part of IHS Inc.

Revenue in the worldwide market for general radiography X-ray is projected to rise to \$3.8 billion in 2017, up 5 percent from \$2.9 billion in 2012. Mobile and retrofit X-ray retrofit upgrade kits are forecast to grow by 13 percent and 15 percent respectively during the same timeframe. Flat-panel detector equipment is showing modest growth, while computed radiography and analogue X-rays are projected to experience a sharp decline.

“With increasing global economic pressure, hospitals worldwide are looking for solutions to improve staff workflow and improve patient care,” said Sarah Jones, medical imaging analyst for IHS. “The cost of new digital X-ray equipment is much higher than for a retrofit upgrade kit, driving many hospitals to purchase this cheaper option. Hospitals also are purchasing mobile equipment to help patients who are critically ill to receive faster treatment.”

The retrofit X-ray market is projected to peak in 2014 as economic stabilisation allows purchasing new equipment. Mobile equipment sales are forecast strong growth, as portable equipment can reach immobile patients in the intensive care unit and emergency room. There is strong demand due to the instant imaging capabilities of digital mobile equipment, allowing users to re-scan very quickly. This improves workflow and eliminates the need for lengthy processing, allowing them to diagnose patients quickly while also saving money for analogue film printing costs.

Compatibility with electronic medical records (EMR) and healthcare IT such as PACS systems in hospitals means X-ray images can be transferred wirelessly from mobile or retrofit system directly to the healthcare IT system. This speeds up diagnosis, as images can be sent to specialists for second opinions.

Despite the strong outlook, the retrofit market is experiencing some limitations, with some countries still opting for new equipment rather than retrofit, as a longer term investment. Liability is also a concern, as the retrofit kit manufacturer may be different to the original equipment manufacturer, providing confusion as to responsibility for the safety of equipment.

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