

US MOBILE MEDICAL IMAGING SERVICE MARKET

FOCUSED INSIGHTS
2024-2029

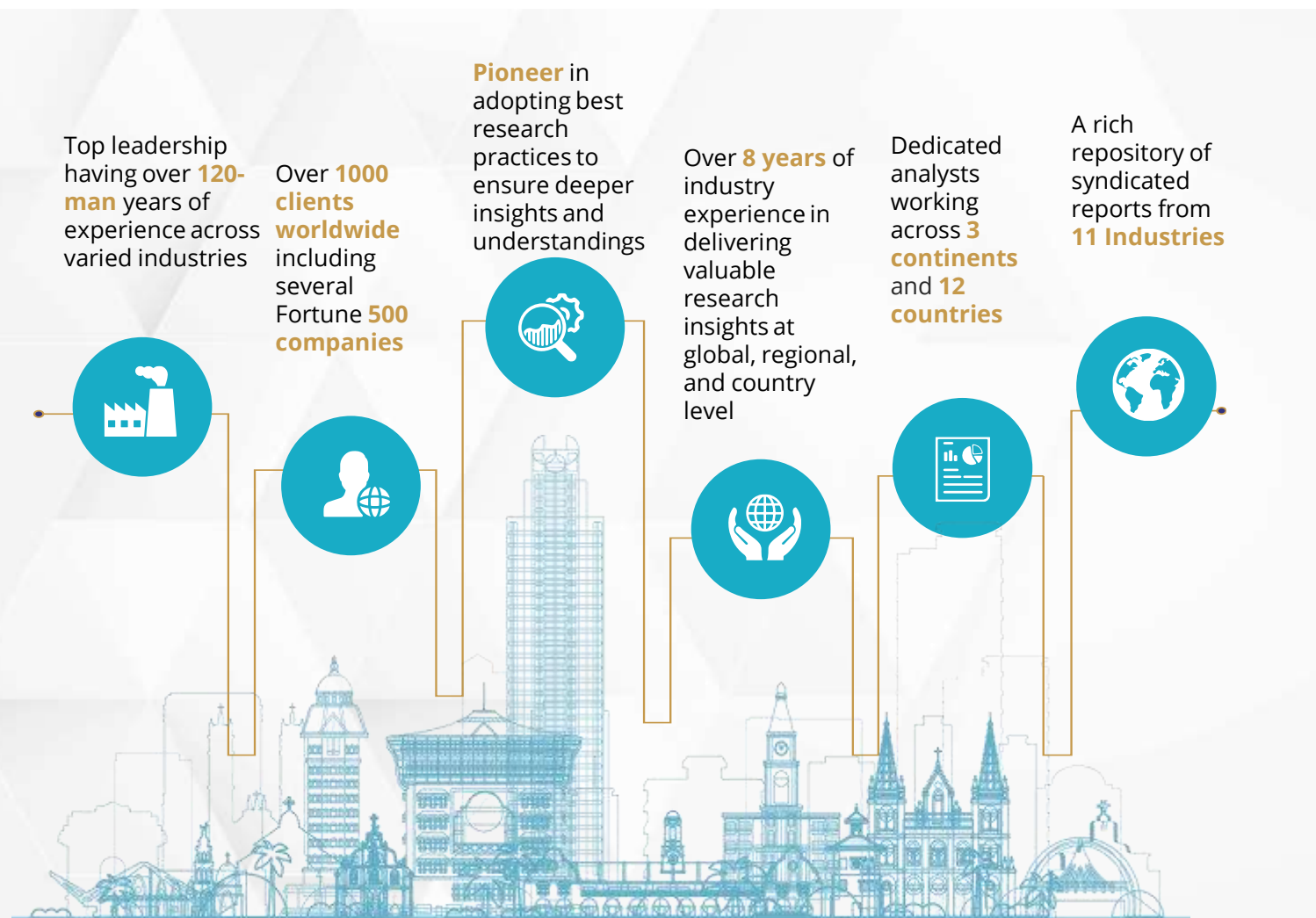
ABOUT ARIZTON

Arizton Advisory & Intelligence

Arizton Advisory & Intelligence provides competitive and insightful business intelligence across various industry verticals. Our expertise and knowledge ensure that the analysis provided is comprehensive, detailed, and complete. The analysis helps our client organizations to make insightful decisions and devise marketing strategies for their businesses. The actionable insight delivered through our market research provide a comprehensive market analysis at even- level of market segmentation in the industry.

Our team of expert ensures the analysis is not just analyzed and presented but also customized depending on the client's requirement. When it comes to competitive intelligence, we ensure our client do not look beyond us.

Our employment base is spread across the globe. Our analysts prepare high-quality research reports and possess a wide industry experience, which means a proper understanding of the client's requirements and delivering premium search report.



ARIZTON'S USP

01 ACCURATE DATA

Arizton critically analyzes the industry and market sectors to provide a reliable and valuable market intelligence. The research-based knowledge empowers clients to formulate intelligent strategies and eventually result in creative, cost-effective, and efficient execution.

02 CLIENT ORIENTED SOLUTIONS

Arizton has expertise in giving deep-dive market insight along with market intelligence to our customers spread crosswise over various undertakings. We at Arizton are obliged to serve our different client base present across MedTech, pharmaceuticals, and life sciences & biotechnology markets within the healthcare industry, among different ventures, present globally.

03 TAILORED SERVICES

Arizton typically involves in the creation of tailored and client-centric research reports.

04 DEEP DOMAIN EXPERT

Our pharmaceutical portfolio tracks over 15 therapy areas with major focus on immunology, oncology, rare & genetic diseases, dermatology, and metabolic diseases. Our medical devices and life sciences portfolio covers in-vitro diagnostics, healthcare IT, patient monitoring, cardiovascular devices, medical imaging, personal protective equipment, clinical laboratory services, and CMO/CDMO services.

05 ANALYTICAL APPROACH

Arizton focuses on providing information related to key issues facing the industry, existing market landscape, regulatory concerns, risk & opportunities, technology evolution, and future commercial potential.

06 COMPREHENSIVE DATA REPOSITORY

Arizton's healthcare reports provide historical and forecast data for over 20 major countries worldwide. We track product approvals/launches, M&A activities, and collaboration/partnership activities among pharma/biotech, medical device, and life sciences companies.

07 PUBLICATION ANALYSIS

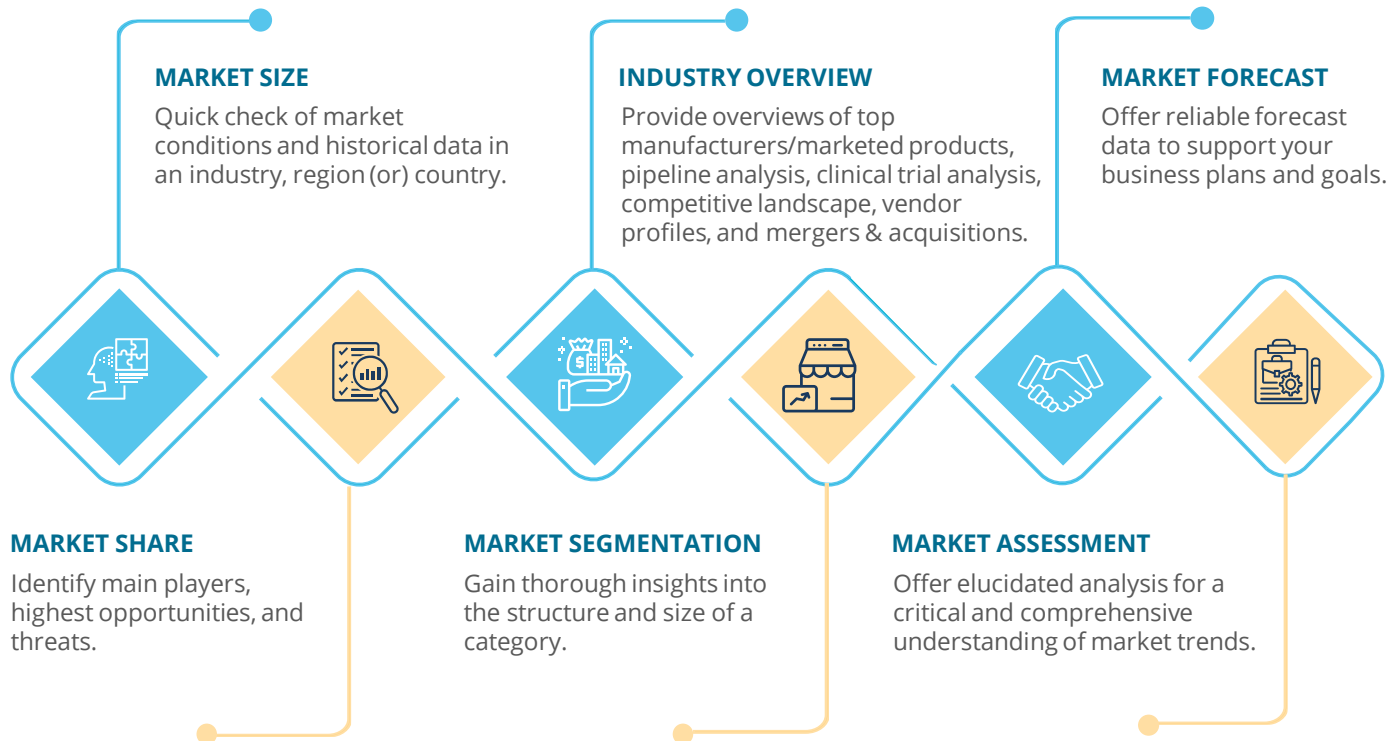
Arizton provides updated information regarding the latest developments and scientific research within an industry/sector. We offer a range of relevant insights, customized to meet our clients' requirements, by analyzing data available in peer-reviewed, scientific research, and business-related publications.



ABOUT THE REPORT



This report provides a comprehensive and current market scenario of the **US MOBILE MEDICAL IMAGING SERVICE MARKET**, including the market size, anticipated market forecast, relevant market segmentations, and industry trends.



KEY QUESTIONS ANSWERED



How large is the US mobile medical imaging market?



What are the latest trends in the US mobile medical imaging market?



Who are the key players in the US mobile medical imaging market?



What are the key areas where US mobile medical imaging should invest in to sustain in the market?



Which is the largest company in the US mobile medical imaging market?



What are some recently approved mobile medical imaging in the US?



How many companies have expanded their mobile medical imaging ownerships in the US?

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DEFINITION & CLASSIFICATION (1/3)



MOBILE MEDICAL IMAGING SERVICE

Patients do initially travel from one place to hospitals to get the medical imaging. Nowadays, the equipment do travel to the patients for conducting the medical imaging procedures. Separate set of companies provide this service. This mobile medical imaging segment is growing at a faster rate in the market.



SERVICE TYPE

Based on service type, the mobile medical imaging market is classified into X-Ray, CT Scan, ultrasound, MRI and Others.

01

X-RAY

The mobile X-ray medical imaging service provided by service providers to the customers

02

CT-Scan

The mobile CT-Scan medical imaging service provided by service providers to the customers

03

Ultrasound

The mobile ultrasound medical imaging service provided by service providers to the customers

04

MRI

The mobile MRI medical imaging service provided by service providers to the customers

DEFINITION & CLASSIFICATION (2/3)



END-USER

01

Long Term Care Facility

The long-term care facilities using mobile medical imaging services include nursing homes, skilled nursing centers, rehab centers, assisted living facilities, senior living, memory care facilities, and palliative care.

02

Home Healthcare

Home healthcare is not a medical facility. Instead, the physician or nurse visits the patient at their place and treats them.

03

Physician-Office

The physician's-office includes the clinics, and temporarily uses the mobile medical imaging facility services .

04

Other

The other segments include industrial facilities, sports team/events, corporations, correctional centers, and individuals.

DEFINITION & CLASSIFICATION (3/3)



GEOGRAPHY

01

South

This region includes the states, such as Georgia, Mississippi, Texas, and other states in the southern region. The usage of mobile medical imaging is increasing in this region

02

West

This region includes the states, such as Alaska, Washington, new Mexico, and California states in the western region. The number of End-Users using the mobile medical imaging is increasing

03

Mid-West

This region includes the states, such as Illinois, Michigan, Missouri, Ohio, and more states in the Mid-West.

04

North-East

North-east includes the states, such as New Jersey, New York, Pennsylvania, and other states in the North-East. The opportunity for the usage of mobile medical imaging in this region is high

EXECUTIVE SUMMARY



MOBILE MEDICAL IMAGING SERVICE OVERVIEW

SERVICE TYPE INSIGHTS



END-USER INSIGHTS

GEOGRAPHY INSIGHTS



MARKET DYNAMICS

COMPETITIVE LANDSCAPE



OTHER COMPANY PROFILES

STRATEGIC RECOMMENDATIONS



QUANTITATIVE SUMMARY

ABBREVIATIONS





EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Market Size & Growth
for the Base Year
2023–2028 is

424.53 MN



The market will be
ACCELERATING, at a
CAGR of over

4.38%



Incremental
Growth

124.41 MN



Absolute
Growth Rate

29.31%

KEY MARKET PLAYERS



KMG



DMS



Sharedimaging

KEY TAKEAWAYS

01 Increasing Number of Independent Living Facilities

Several independent living facilities have increased in the US. This will increase the demand for mobile medical imaging as the independent living facilities engage with mobile imaging service providers.

02 Shift Toward Value-Based Medicines

The demand for value-based healthcare products has widened the market, especially in the US. The focus is largely on reducing the burden of treatments by adopting advanced products.

03 Investments in Innovation

It constantly develops and launches innovative technology, such as highly portable, and produces high-quality medical images. These innovations are important for vendors operating in this highly competitive market to achieve healthy sales growth and increase market share.

04 Focus on Inorganic Growth

Vendors, especially corporate players pursue inorganic growth strategies, such as acquisitions, to expand their presence, enhance their service portfolios, and improve their expertise.



EXECUTIVE
SUMMARY



MOBILE MEDICAL
IMAGING SERVICE
OVERVIEW

SERVICE TYPE
INSIGHTS



END-USER
INSIGHTS

GEOGRAPHY
INSIGHTS



MARKET DYNAMICS

COMPETITIVE
LANDSCAPE



OTHER COMPANY
PROFILES

STRATEGIC
RECOMMENDATIONS



QUANTITATIVE
SUMMARY

ABBREVIATIONS





MOBILE MEDICAL IMAGING SERVICE MARKET OVERVIEW

MARKET OVERVIEW & KEY FINDINGS



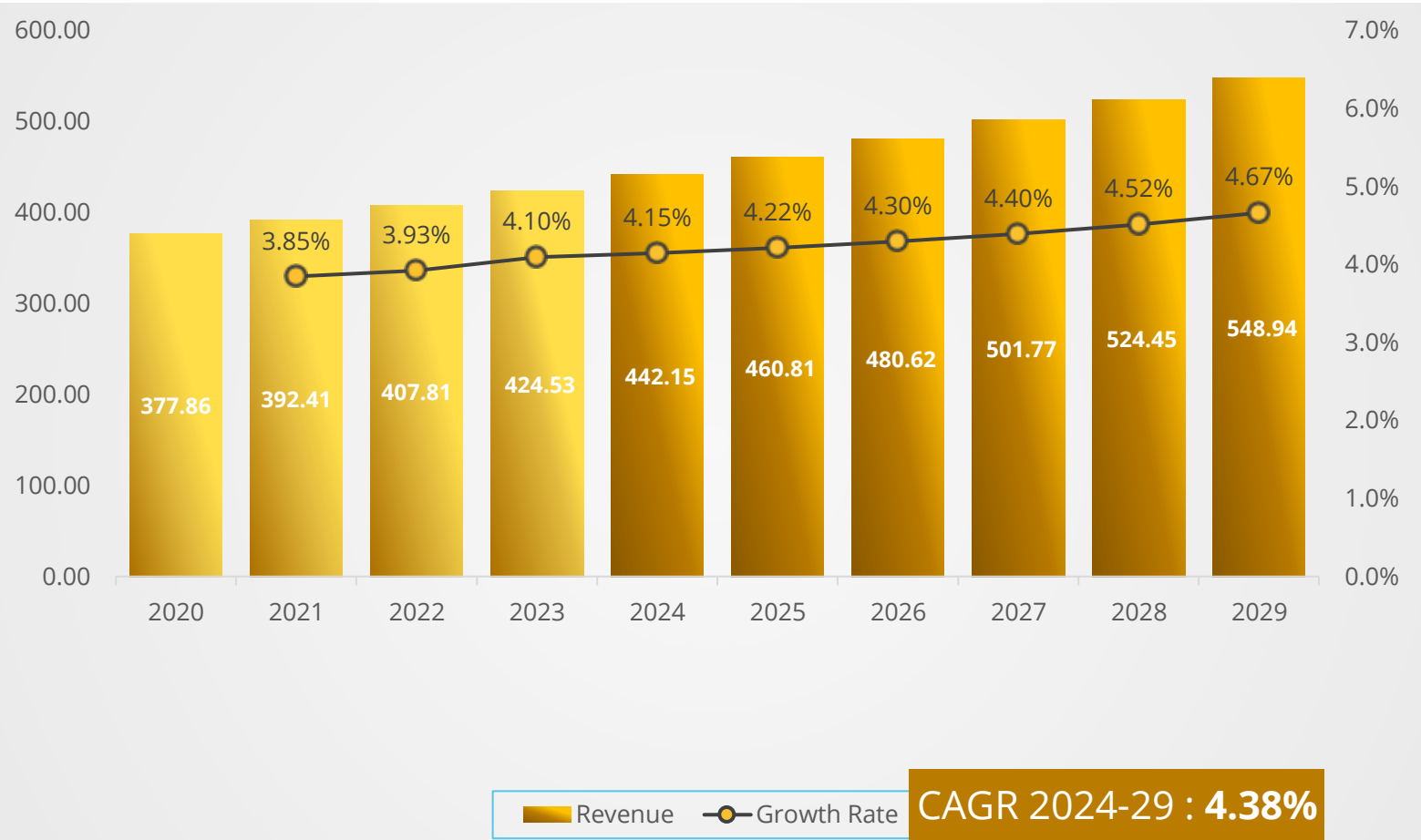
In 2023, the US mobile medical imaging service market was valued at **\$424.53 million** and is expected to reach **\$548.94 million** by 2029, growing at a **CAGR of 4.38%**.



- There are over 100 mobile medical imaging service providers in the US market, and which has grown rapidly. The COVID-19 pandemic has increased the demand for mobile medical imaging services in the US.
- There are around 6000 functioning ASCs in the US and increasing constantly. The introduction of ASCs has revolutionized the US healthcare segment. The hospital outpatient settings have shifted to the ASCs in the market. ASCs are also a specialty that uses mobile medical imaging services.
- There is a significantly increasing aging population in the country, driving the demand for independent living facilities in the US. In 2019, around 92% of the US senior population showed a stabilized occupancy trend for independent living. Assisted living facilities are one of the end-users using mobile medical imaging services.
- The increasing diseased population and more independent living in the US have changed in the medical segment. This includes mobile medical imaging. The number of mobile medical imaging providers has increased with the growing target population in the market.
- The US is a country with a wide population demanding better care. Some rural areas are far from well-developed cities that have healthcare facilities and better infrastructure. This increases the demand for mobile medical imaging services in these rural, remote areas.

MARKET SIZE & FORECAST

US Mobile Medical Imaging- Market Size & Forecast (\$ Mn)



The US is the **largest** revenue contributor in the global mobile medical imaging market.

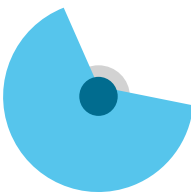


Globally, in 2023, the US mobile medical imaging market accounted for a share of **~ 45%**



Absolute Growth

29.31%



Incremental Growth

124.41 Mn

EXECUTIVE
SUMMARY



MOBILE MEDICAL
IMAGING SERVICE
OVERVIEW

SERVICE TYPE
INSIGHTS



END-USER INSIGHTS

GEOGRAPHY
INSIGHTS



MARKET DYNAMICS

COMPETITIVE
LANDSCAPE



OTHER COMPANY
PROFILES

OTHER COMPANY
PROFILES



QUANTITATIVE
SUMMARY

QUANTITATIVE
SUMMARY



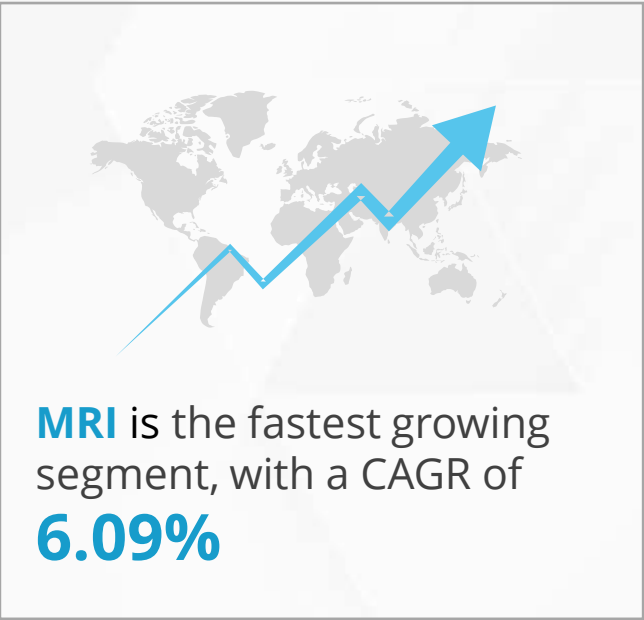


SERVICE TYPE INSIGHTS

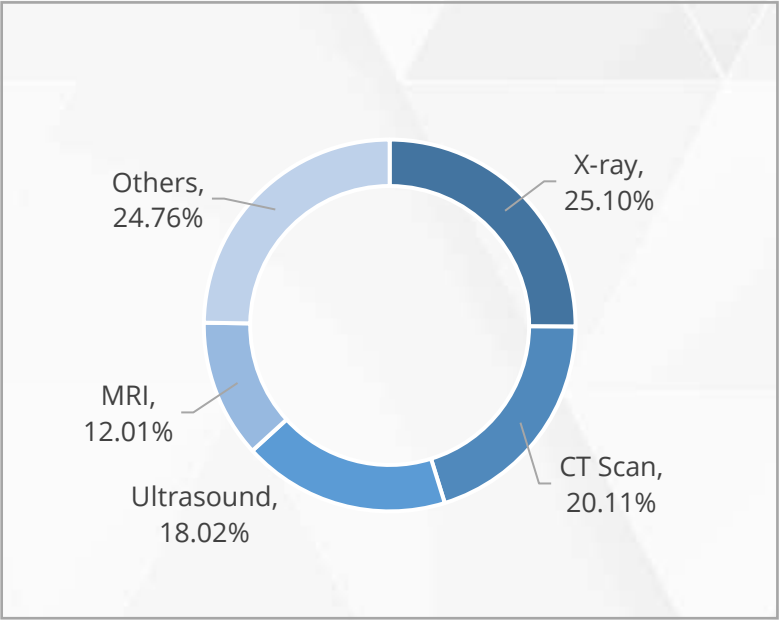
SERVICE TYPE SNAPSHOT

SERVICE TYPE SNAPSHOT

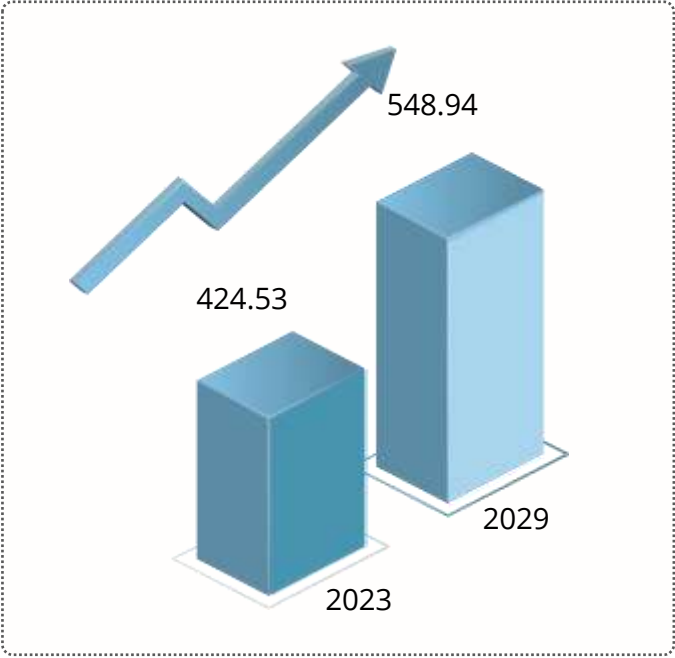
MARKET GROWTH



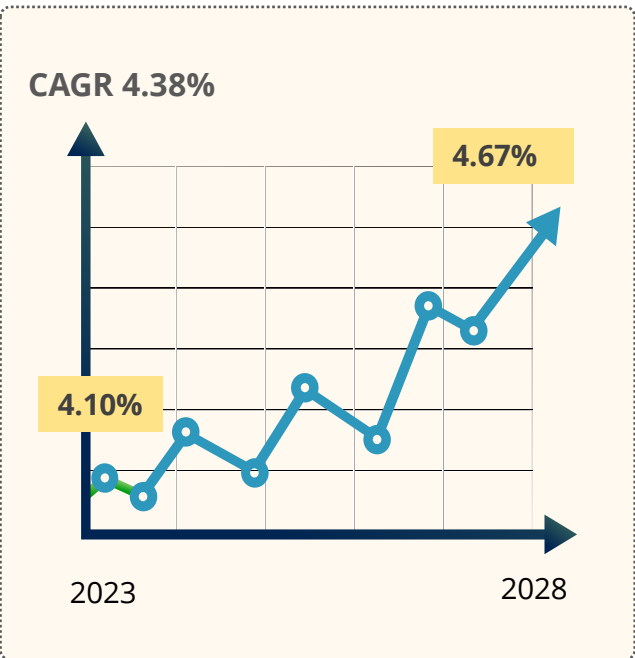
MARKET SHARE



PROJECTED REVENUE (\$ Mn)



GROWTH RATE



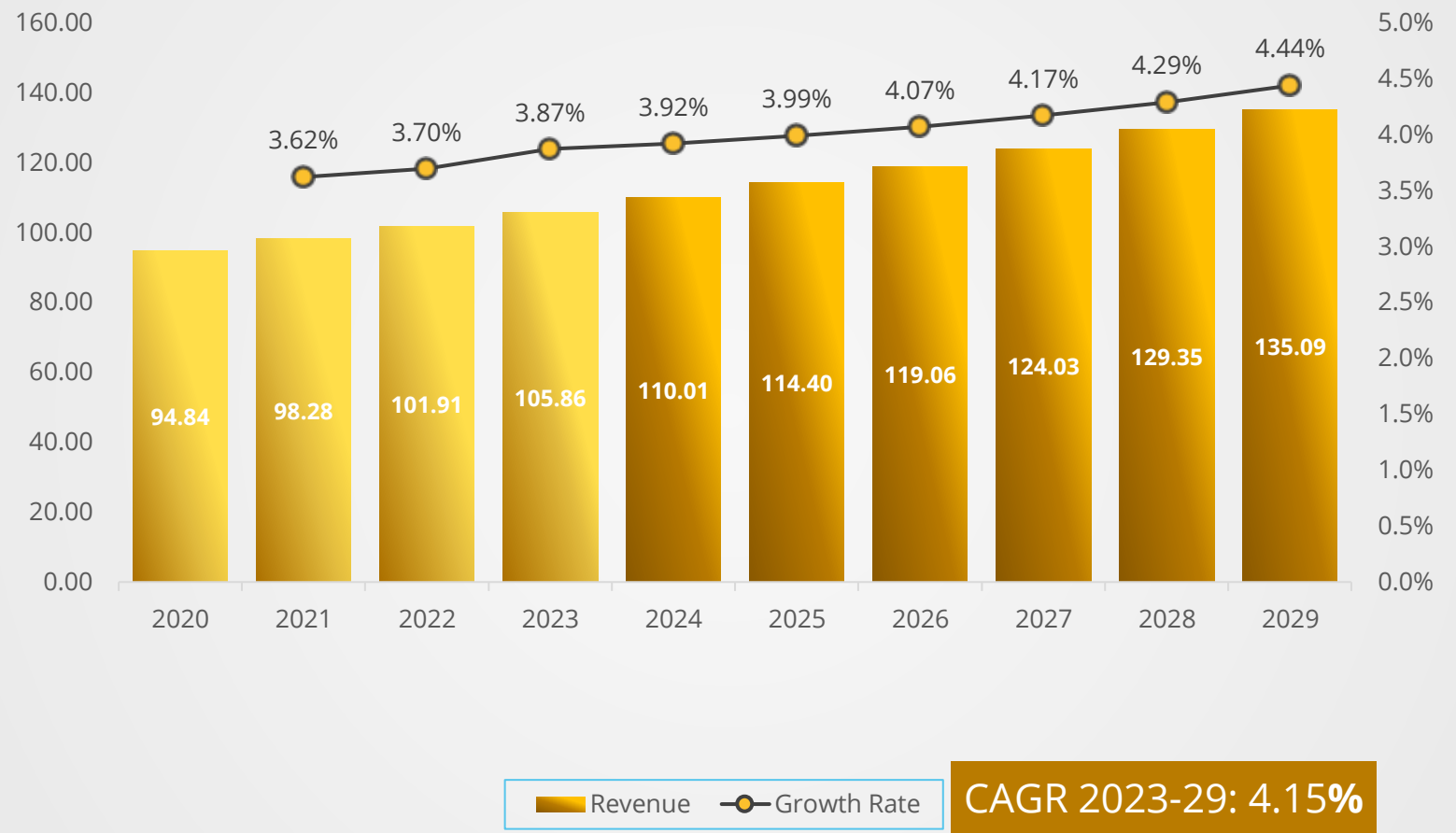
X-RAY: MARKET OVERVIEW



- In 2023, based on the service type, the X-ray segment was valued at \$105.86 million and is projected to reach \$135.09 million by 2028, growing at a CAGR of 4.15%.
- In 2021, around 2.5 billion X-ray procedures conducted globally, which has increased. This will increase the demand for X-rays. The US is one of the largest X-ray products and procedures globally. This includes the mobile medical imaging service.
- X-rays are one of the most used modalities. X-ray is majorly used for diagnosing bone fractures. Over five lakhs manufacturing facilities are prone to accidents and require immediate treatment, including diagnostics. These demand the use of mobile medical imaging segments.
- Over ten million people in the US have osteoporosis. X-ray is also one of the major diagnostic tools for osteoporosis. People, especially in assisted living facilities, have period health check ups, including x-ray imaging. This increases the demand for mobile medical imaging services.
- The US healthcare settings have revolutionized, thus shifting treatments from hospitals to the patient's side. This has also increased the demand for mobile medical imaging services.
- In 2020, heart disease grew by 4.8%. Chest x-ray is one of the most commonly used method to diagnose. This constant increase in the target population will increase the market demand.

X-RAY (2/2)

Market Size & Forecast – X-ray (\$ Mn)



Market share of X-ray (2023)

~24.94%



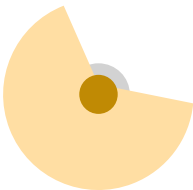
Market share of X-ray (2029)

~24.61%



Incremental Growth (2023-2029)

29.24 Mn



Absolute Growth (2023-2029)

27.62%

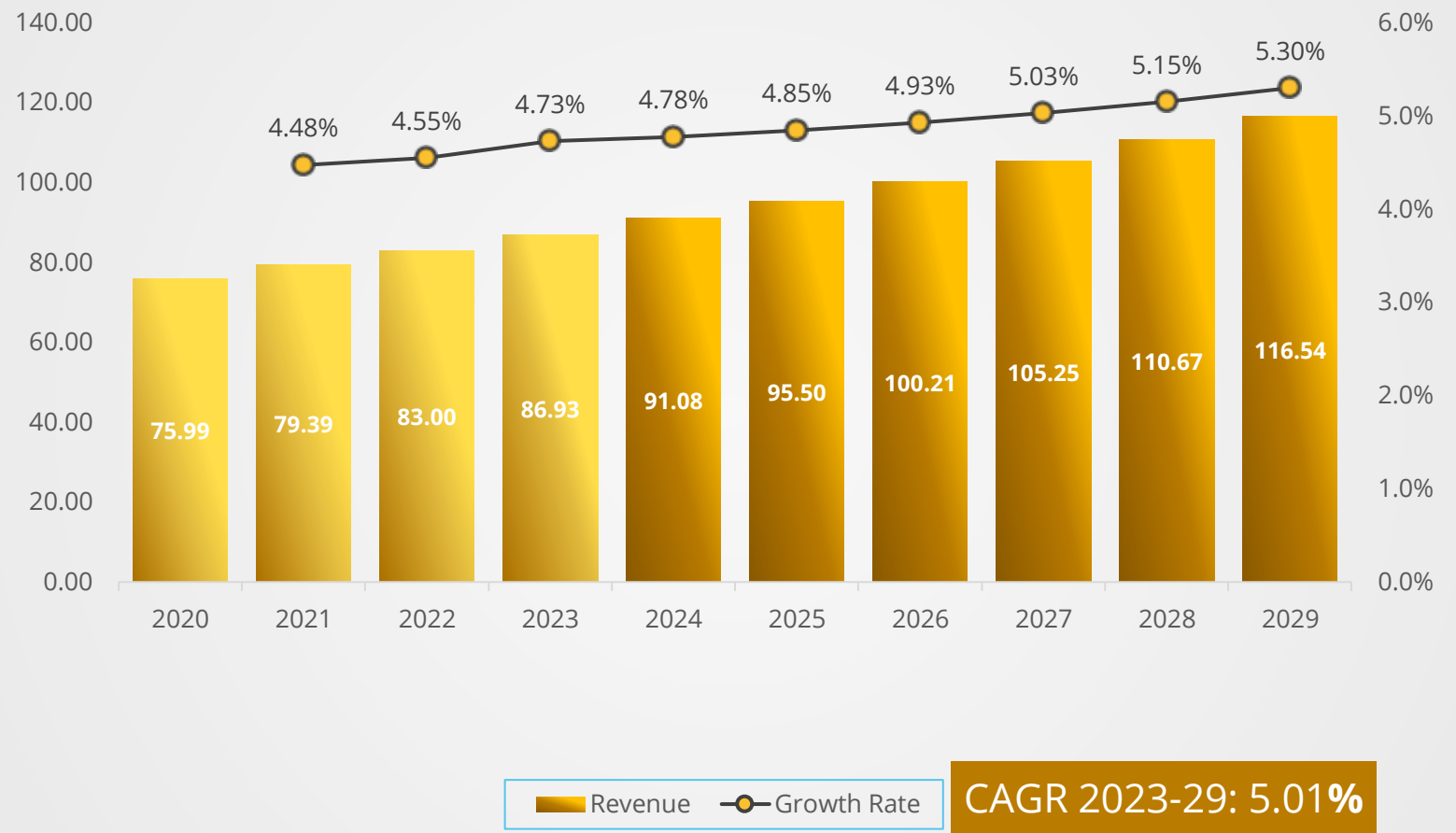
CT SCAN: MARKET OVERVIEW



- In 2023, based on service type, the CT Scan segment was valued at \$86.93 million and is projected to reach \$116.54 million by 2028, growing at a CAGR of 5.01%.
- The main reason for the rise in mobile CT is that it requires lower initial investments. Small-scale hospitals, clinic services, or start-ups can invest according to their initial phase and generate revenue. Mobile CT units are installed on semi-trailer trucks and transported from place to place.
- A patient-related facilitator is that patients are less likely to travel for scanning purposes. Eliminating patient transport reduces the time required for imaging. Another reason is that mobile CT does not require the space and other arrangements required for a regular CT scan in a hospital. Mobile scanners often require a single entity, allowing mobile CT manufacturers to park anywhere outdoors and start scanning onsite care clinics. Therefore, the mobile CT scanner keeps the patient local.
- The chest CT was considered beneficial in managing COVID-19 as it can determine the severity and extent of COVID-19 pneumonia. Mobile CT allows a rapid diagnosis of COVID-19 while minimizing the risk of infection.
- The portable CT imaging market has seen an increase in opportunities from the successful use of CT technology in treating tumors, trauma, chronic unexplained headaches, and staging of various diseases.
- The rising demand for portable CT scanners in diagnostic services in developed countries is a major trend that enhances opportunities in the CT imaging devices market.

CT SCAN (2/2)

Market Size & Forecast – CT Scan (\$ Mn)



Market share of CT Scan (2023)

20.48%



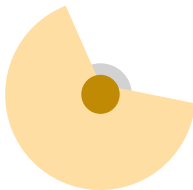
Market share of CT Scan (2029)

21.23%



Incremental Growth (2023-2029)

29.61 Mn



Absolute Growth (2023-2029)

34.06%

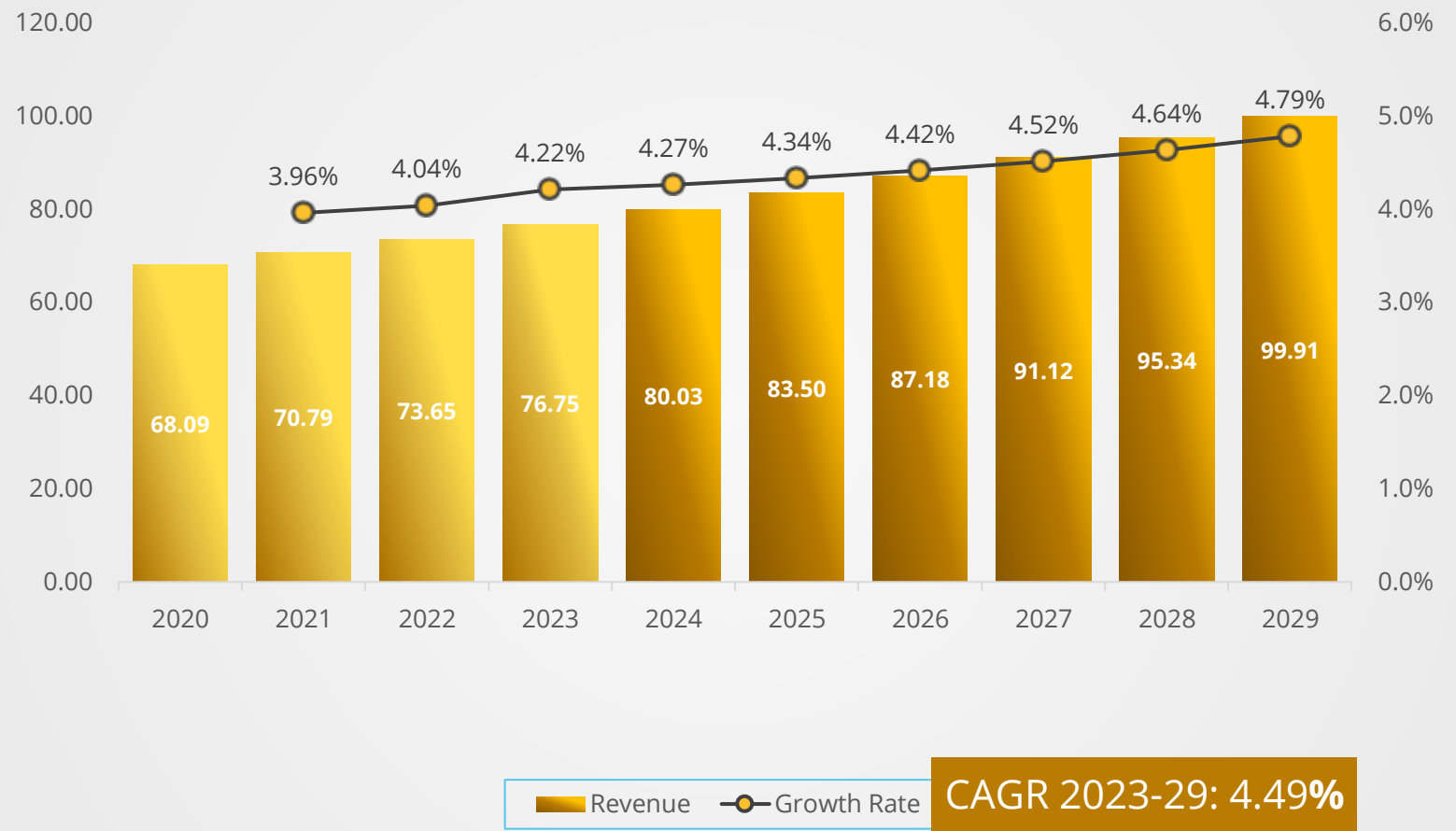
ULTRASOUND: MARKET OVERVIEW



- In 2023, based on service type, the ultrasound segment was valued at \$76.75 million and is projected to reach \$99.91 million by 2029, growing at a CAGR of 4.49%.
- Mobile ultrasound machines are particularly useful in settings with limited space, or being mobile is critical. While there is a well-established market for portable ultrasonic devices in the US, the demand for mobile ultrasonic devices has also grown.
- With the ability of mobile ultrasound to move across, be used in quick diagnoses, and enhance workflow, mobile ultrasound machines have been adopted in daily practice by many specialties, including Cardiology, Vascular, Radiology, Endocrinology, Pediatric, and Obstetrics and Gynecology.
- According to National Ultrasound Reviews, mobile ultrasound costs less than the typical \$15,000 to \$ 200,000 price range for mobile systems. Mobile ultrasound systems have expanded the use of ultrasound in an environment where even compact portable ultrasound devices are impractical. In addition to long-term care centers., telemedicine and other medical institutions use this for old age people.
- Per delivery requires around 5.4 ultrasounds. In the US, there are more than three million pregnancies, and there are patients who prefer the use of mobile medical imaging for their checkups, instead of alternative options.

ULTRASOUND (2/2)

Market Size & Forecast – Ultrasound (\$ Mn)



Market share of Ultrasound (2023)

18.08%



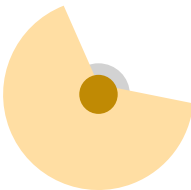
Market share of Ultrasound (2029)

18.20%



Incremental Growth (2023-2029)

23.15 Mn



Absolute Growth (2023-2029)

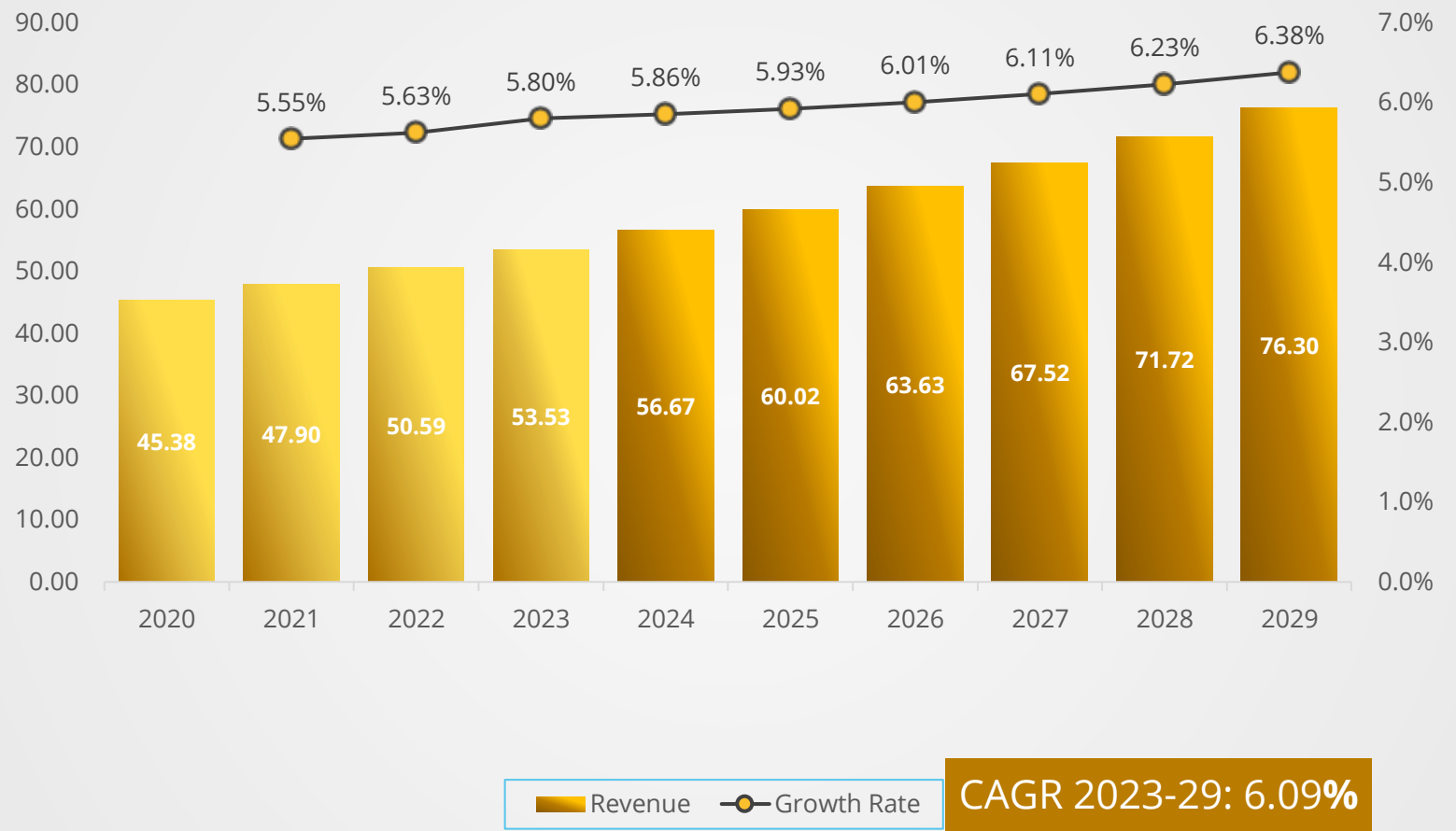
30.17%

MRI: MARKET OVERVIEW



- In 2023, based on service type, the MRI was valued at \$53.53 Million and is projected to reach \$76.30 Million by 2029, growing at a CAGR of 6.09%.
- Mobile MRI can bring cutting-edge healthcare to almost any facility. These mobiles are magnetically shielded and can be transported with a fully excited magnet to minimize the set-up time at different locations.
- Mobile MRIs offer convenient patient access and an improved patient experience. MRI technologies do not require large capital investments or upgrades. The ability of mobile MRIs to provide convenient and flexible services, reduce fixed costs, and provide a potential source of income drives the demand for this technology.
- In 2022, the American Cancer Society estimated that approximately 1.9 million new cancer cases were diagnosed in the US. Many of these cancer types can be detected and managed using MRI technology. Majority of the patients in complex conditions do reside in settings like palliative care, hospice care and long-term care. This increases the demand for the mobile imaging
- Mobile imaging in healthcare applications has evolved rapidly due to its diverse uses. Mobile MRI consists of a tractor, van, and trailer that holds MRI scans in place. It also includes extracorporeal shock wave lithotripsy units and gamma cameras that enable mobile medical imaging.

Market Size & Forecast – MRI (\$ Mn)



Market share of MRI (2023)

12.61%



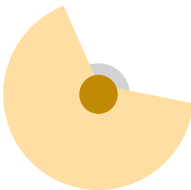
Market share of MRI (2029)

13.90%



Incremental Growth (2023-2029)

22.77 Mn



Absolute Growth (2023-2029)

42.54%

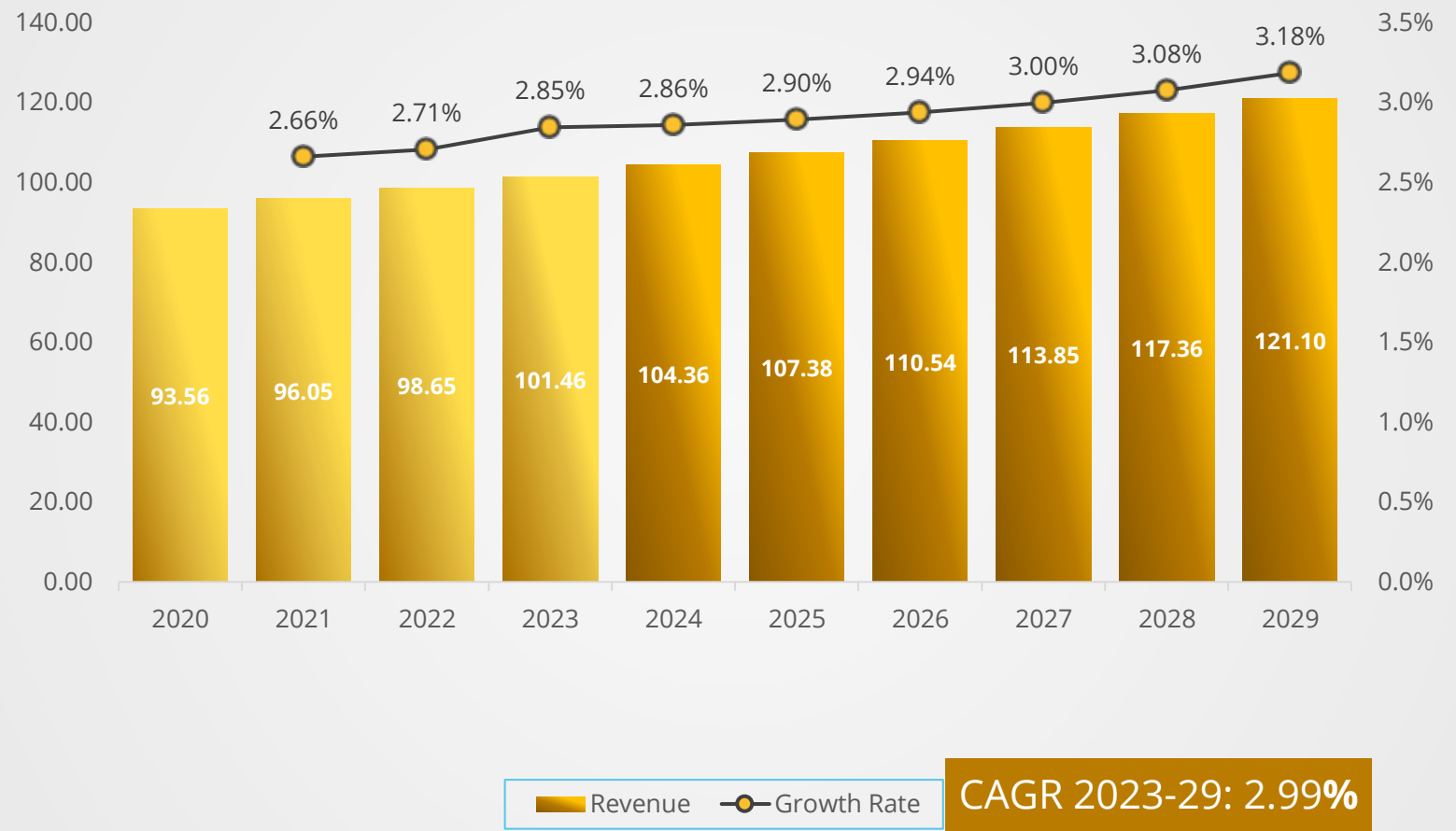
OTHERS: MARKET OVERVIEW



- In 2023, based on service type, the others segment was valued at \$101.46 million and is projected to reach \$121.0 million by 2029, growing at a CAGR of 2.99%.
- The others segment includes mobile imaging services in various modalities, such as nuclear imaging and pediatric segment, which include imaging from all modalities. However, specially designed medical imaging equipment for pediatrics is included in this segment.
- The increasing incidence and prevalence of cancer and cardiovascular diseases are important drivers of market growth. Early detection and treatment play an instrumental role in preventing these conditions. Nuclear medicine plays an important role in these areas.
- Many organizations provide better treatments to their workers as a part of awareness. Setting up smaller camps to diagnose various diseases, including cancer, happens across the US. This drives the demand for nuclear medical imaging using the mobile service set-up in the market.
- The number of people using mobile medical imaging for nuclear imaging is low. Especially people from high economic backgrounds do prefer using these services to maintain privacy for their health conditions and high-quality health care treatments.

OTHERS (2/2)

Market Size & Forecast – Others (\$ Mn)



Market share of Others (2023)

23.90%



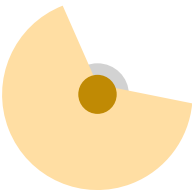
Market share of Others (2029)

22.06%



Incremental Growth (2023-2029)

19.64 Mn



Absolute Growth (2023-2029)

19.36%

EXECUTIVE
SUMMARY



MOBILE MEDICAL
IMAGING SERVICE
OVERVIEW

SERVICE TYPE
INSIGHTS



END-USER INSIGHTS

GEOGRAPHY
INSIGHTS



MARKET DYNAMICS

COMPETITIVE
LANDSCAPE



OTHER COMPANY
PROFILES

STRATEGIC
RECOMMENDATIONS



QUANTITATIVE
SUMMARY

ABBREVIATIONS



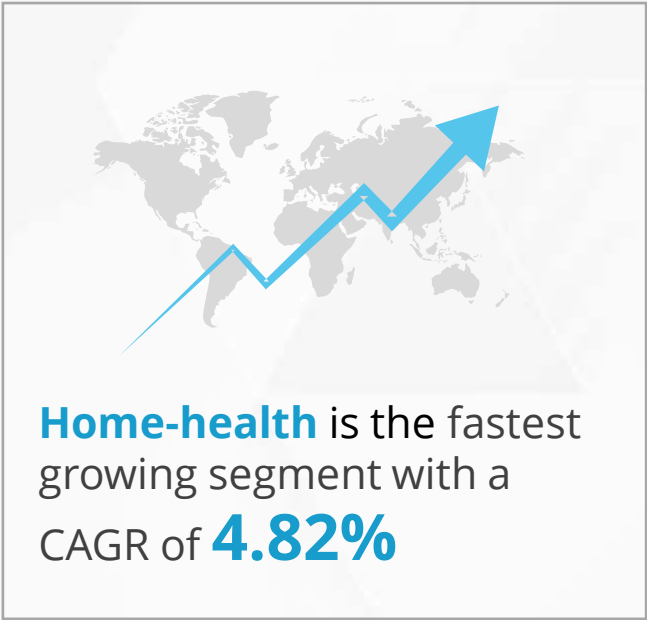


END-USER INSIGHTS

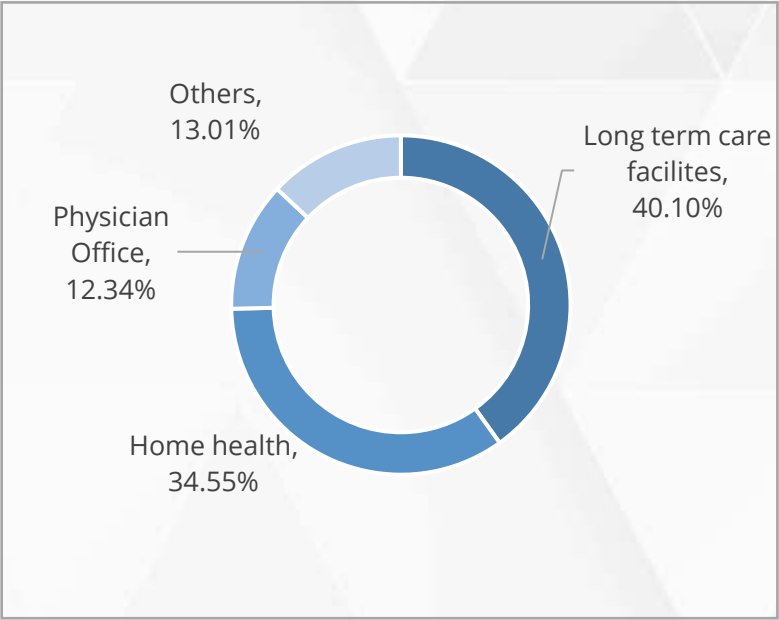
END-USER SNAPSHOT

END-USER SNAPSHOT

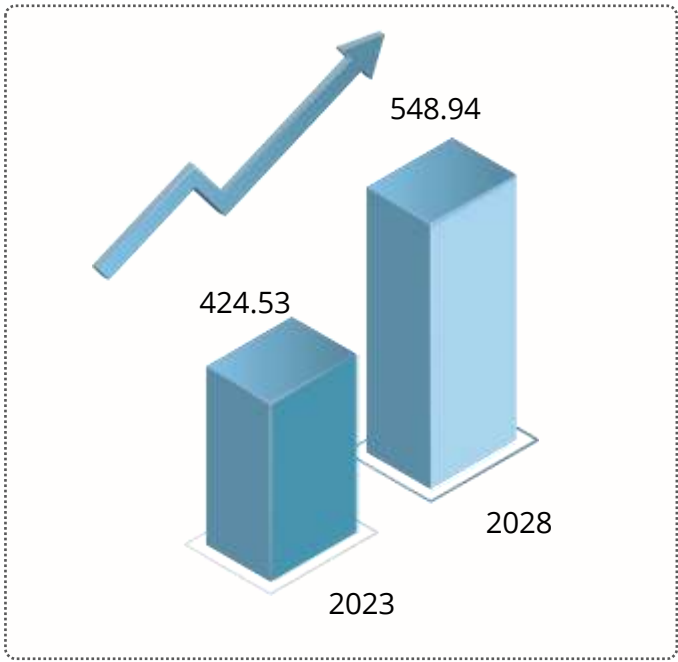
MARKET GROWTH



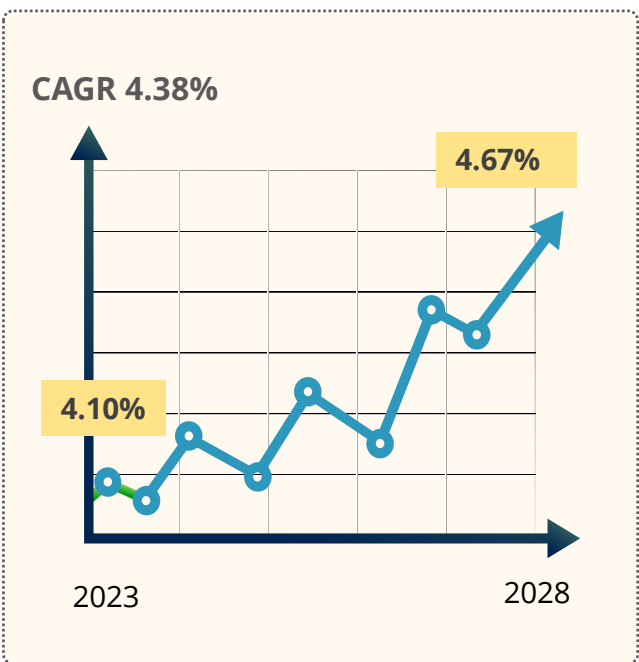
KEY SEGMENTS



PROJECT REVENUE (\$ Mn)



GROWTH RATE



LONGTERM CARE: MARKET OVERVIEW



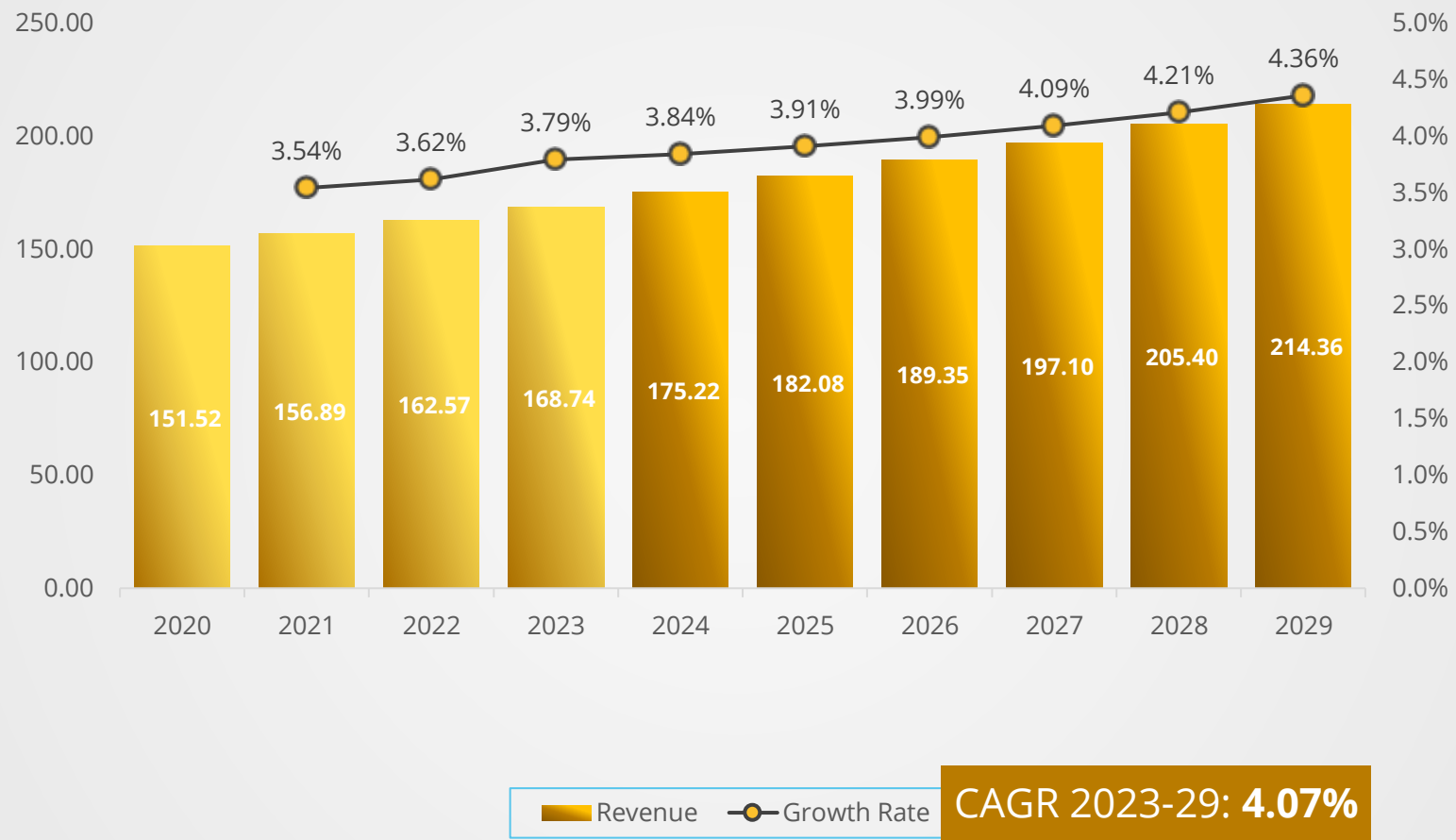
In 2023, the long-term care end-user segment dominated the market with a 39.75% market share and was valued at **\$168.74 million**, growing at a CAGR of **4.07%**.

- The long-term care facilities using mobile medical imaging services includes nursing home, skilled nursing centers, rehab center, assisted living facilities, senior living, memory care facilities, and palliative care.
- The preference for long-term care facilities has increased in the US and it is further expected to increase at a faster rate. Majority of the US people prefer long term care as they cannot perform their regular functions, including immobilization. This increases the demand for the mobile medical imaging service.
- Homecare is one of the fastest growing segment and the patients preferring to undergo the treatment in their own place has increased the demand for mobile medical imaging.
- In the settings, such as palliative care, hospice care, and memory care, it is very challenging to shift patient from one place to other for treatment. This has overcome the mobile medical imaging service in the market.
- Post treatment in hospitals, patients prefer to shift to long term care facilities as the quality of care is better in these settings. The hospitals are following this strategy to increase the hospital bed occupancy, because of this the adoption of long-term care centers has increased and the services, such as mobile medical imaging will increase.



MARKET SIZE & FORECAST

Long-Term Care– Market Size & Forecast (\$ Mn)



In 2023, the long-term care segment accounted for

39.75%



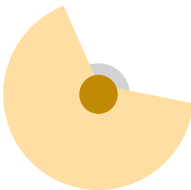
In 2028, the long-term care segment will account for

39.05%



Absolute Growth Rate 2023

27.04%



Incremental Growth 2028

45.62 Mn

HOME HEALTH: MARKET OVERVIEW



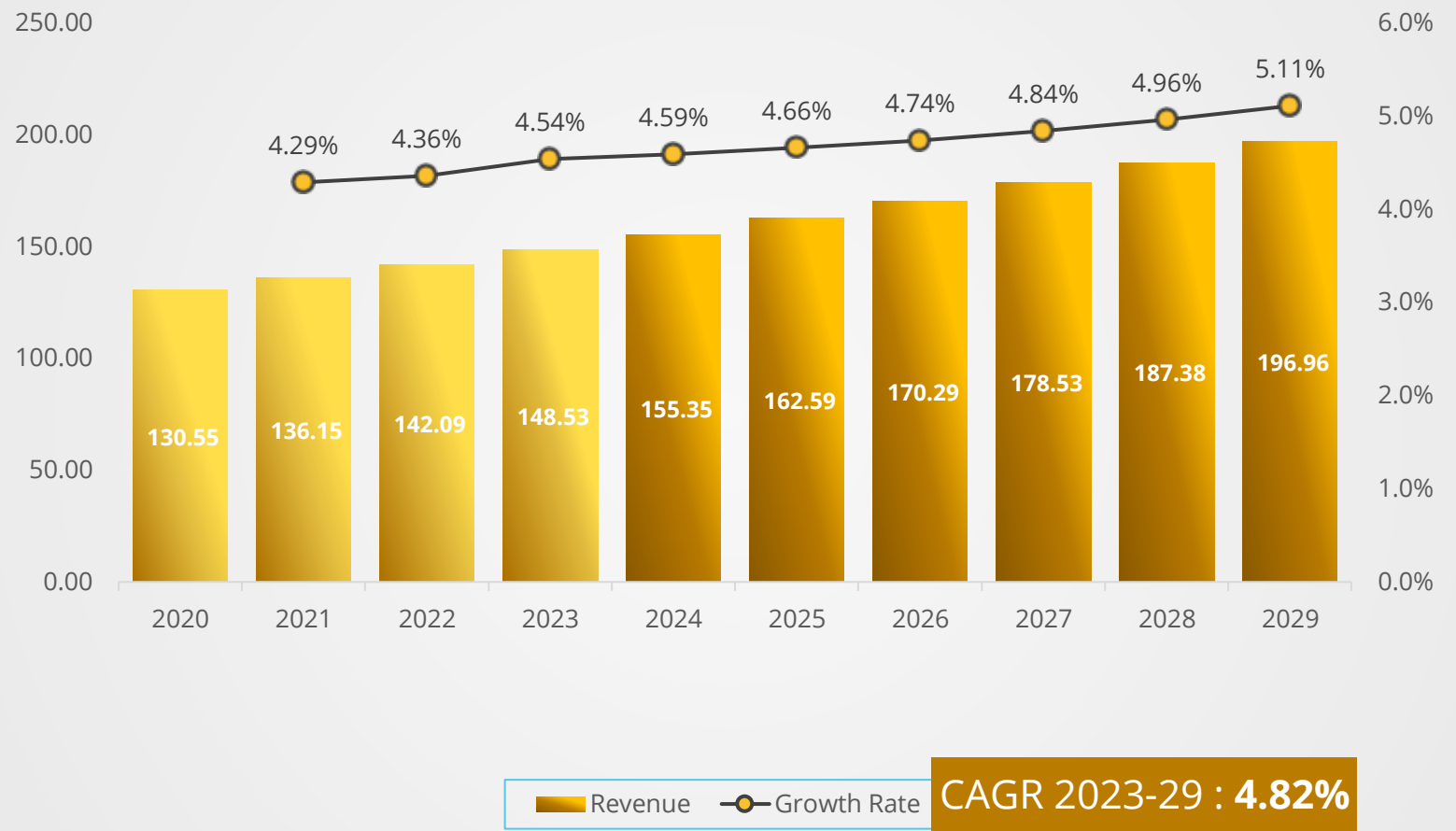
In 2023, the home-health end-user segment accounted for 34.99% and was valued at **\$148.53 million**, growing at a CAGR of **4.82%**.



- In the US, nine out of ten patients in Medicare prefer to go to short-term home care than nursing care. The dependency on home care has increased, and the shift from hospital to patient-centric has driven the demand for the home care model. This model has given a rise to better services, such as mobile medical imaging segments.
- More than 73% of Americans are confident that the quality of care received is better in the home care model compared with other healthcare models. This has increased the shift from skilled nursing care facilities to home care.
- According to the CDC, the market has over 11,000 home health agencies. The number of home health service providers has increased, indirectly demanding better mobile medical imaging segments.
- Alzheimer's disease, memory loss patients, specially-abled patients, and patients with immobility are treated in home health conditions. These patients do require medical imaging for monitoring the treatment. Mobile medical imaging is one of the best ways to perform this.
- Some mobile medical imaging service providers, such as Alpha One, also offer quality assurance programs that are custom-created to meet each specialty's individual demands. This has increased the standard of treatment and comfort for patients.

MARKET SIZE & FORECAST

Home Health– Market Size & Forecast (\$ Mn)



In 2023, home health accounted for

34.99%



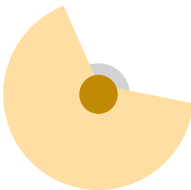
In 2028, home health will account for

35.88%



Absolute Growth Rate 2023

48.43%



Incremental Growth 2028

32.60 Mn

PHYSICIAN-OFFICE: MARKET OVERVIEW



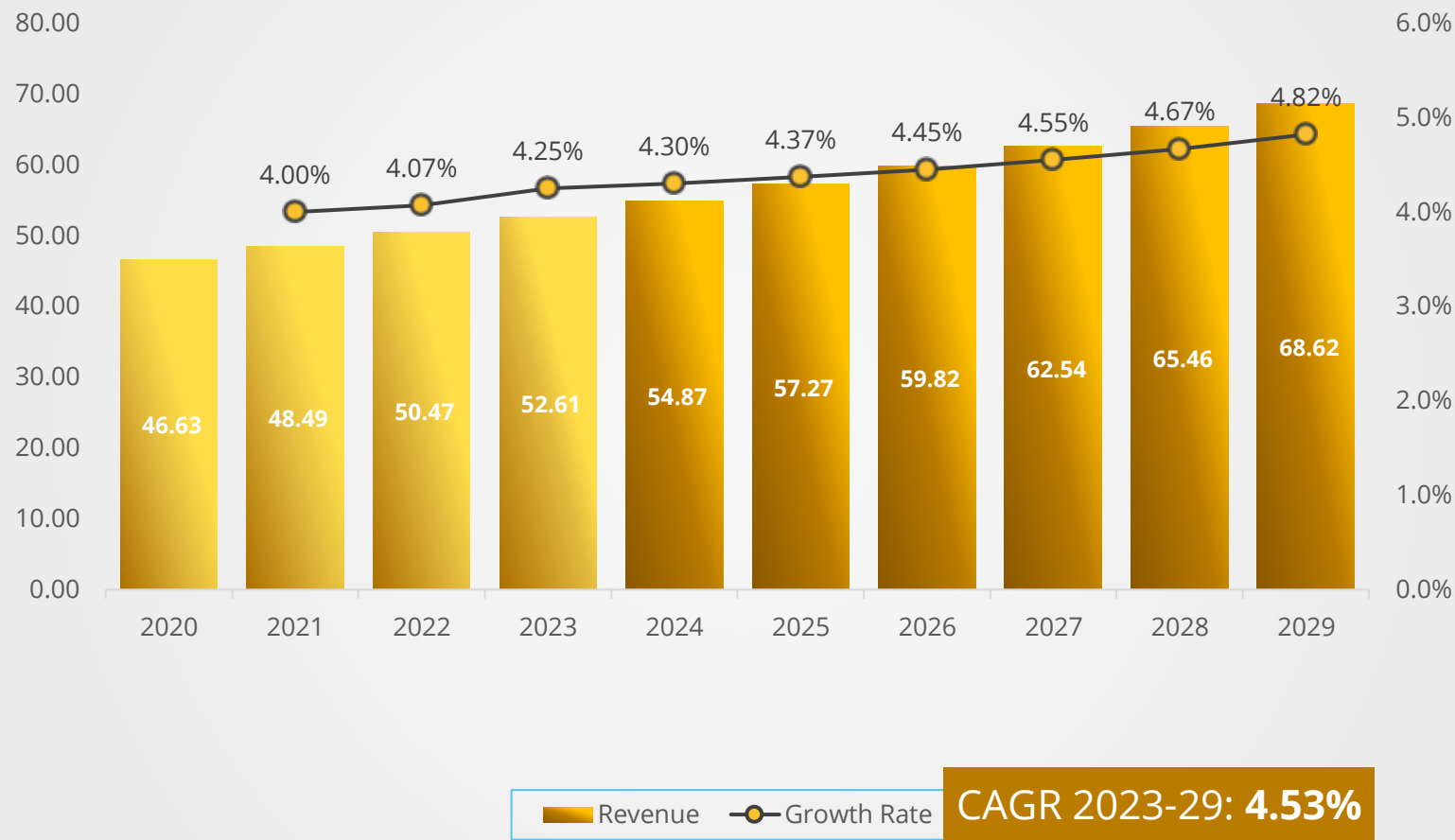
In 2023, physician-office end-user segment accounted for 12.39% and was valued at **\$52.61 million**, growing at a CAGR of **4.53%**.



- There are more than two lakh physician offices in the US, which has increased faster. The physician offices especially in rural areas treat patients with post operative care, regular check-ups for various treatments and more. Medical imaging is one of the major parts of the treatments. Mobile medical imaging services are one of the best alternatives for the physician units without their imaging centers.
- During the COVID-19 pandemic, many physician offices preferred to use the mobile medical imaging to diagnose COVID-19, and other disease conditions in the market.
- The demand for mobile medical imaging services during the pandemic increased. However, it was not across all the segments. Only a few specialties did demand the use of medical imaging, and few were negatively impacted.
- The number of smaller healthcare settings such as clinics, physician offices has economical limitations, which limits them from hiring a mobile medical imaging service. However, many smaller mobile medical imaging units are associated with smaller standalone medical imaging labs, which provide the service at a lower costs.
- Clinics and physician offices have increased the demand for medical imaging, especially in rural areas, as they can provide complete treatment instead of referring them to specialty hospitals. Several clinics and physician offices have increased their presence in rural areas, which has multiplied the demand for mobile medical imaging services.

MARKET SIZE & FORECAST

Physician Office– Market Size & Forecast (\$ Mn)



In 2023, the physician corporate segment accounted for

12.39%



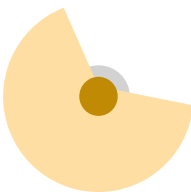
In 2028, the physician corporate segment will account for

12.50%



Absolute Growth Rate 2023

30.42%



Incremental Growth 2028

16.01 Mn

OTHERS: MARKET OVERVIEW



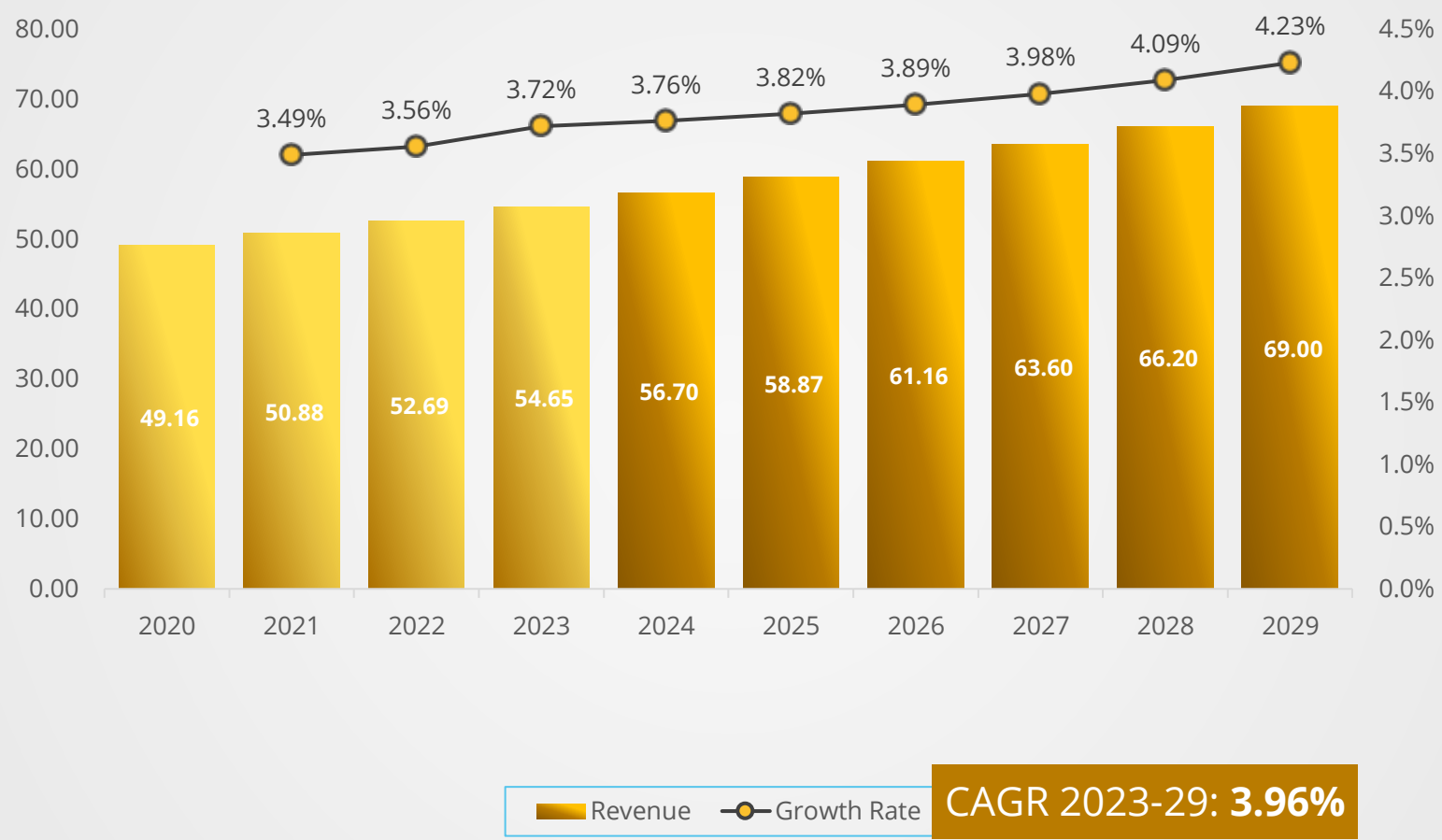
In 2023, the others end-user segment accounted for 12.87% of the market and was valued at **\$54.65 million**, growing at a CAGR of **3.96%**.



- The others segment includes industrial facilities, sports team/events, corporations, correctional centers, and individuals.
- There are more than five lakh industrial facilities in the US, and it has increased faster. These manufacturing facilities are prone to accidents at a higher rate. For immediate treatments, mobile medical imaging service is used. The industrial facilities conduct various healthcare programs that offer free health check-up, which uses mobile medical imaging.
- Around 19% of the US population participates in sports events annually. Several injuries are found, especially in the limbs. The specialized sports clubs, organizers do have the mobile medical imaging services to diagnose the patient's condition and check the participants before participating in various events.
- The US corporations provide multiple healthcare programs to their workers annually. This includes the health check-up and more for the workers for the insurance purpose. They temporarily set up the hospitals and medical imaging service providers.
- Correctional centers cannot shift prisoners to hospitals regularly, as it is challenging and risky for the officers. In mobile imaging centers, mobile healthcare treatment provides better services to support the officers.
- Some individuals, especially those from better economic backgrounds, increasingly use the mobile medical imaging solutions for the treatment.

MARKET SIZE & FORECAST

Others- Market Size & Forecast (\$ Mn)



In 2023, others accounted for

12.87%



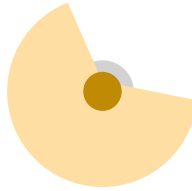
In 2029, others will account for

12.57%



Absolute Growth Rate 2023

26.27%



Incremental Growth 2028

14.36 Mn

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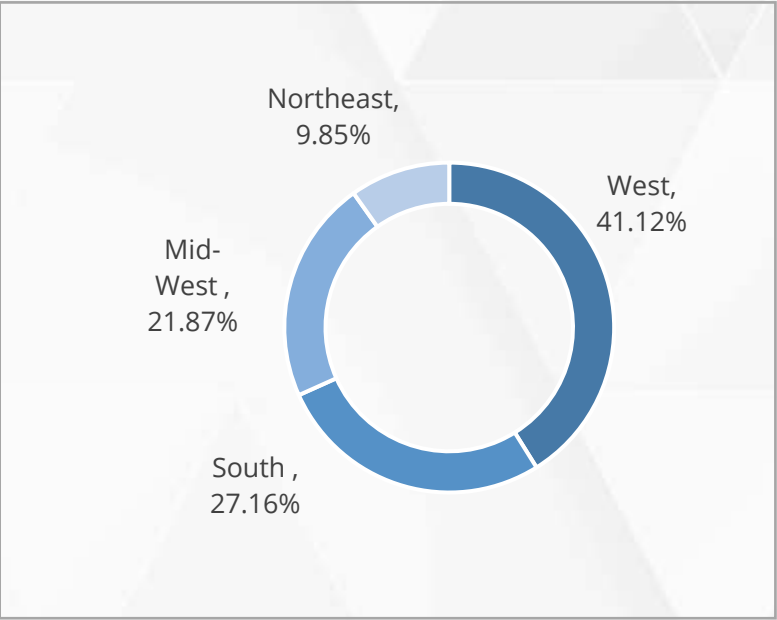
GEOGRAPHY SNAPSHOT

GEOGRAPHY SNAPSHOT

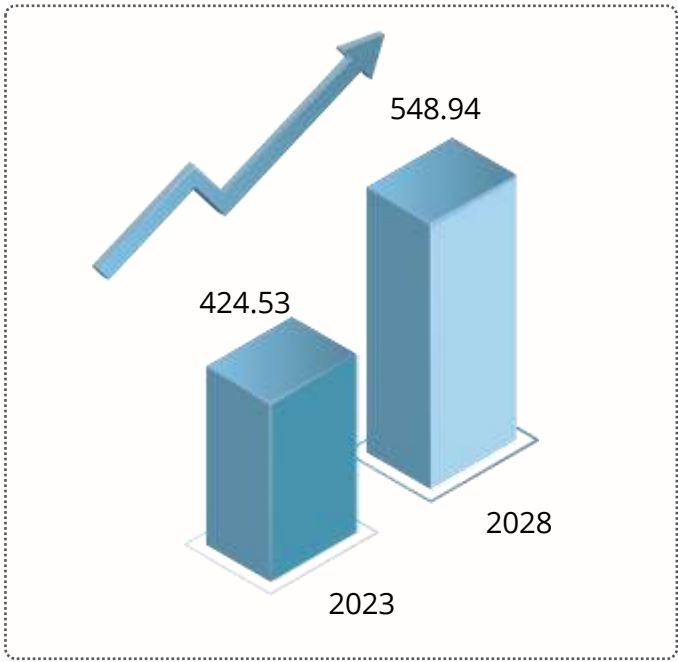
MARKET GROWTH



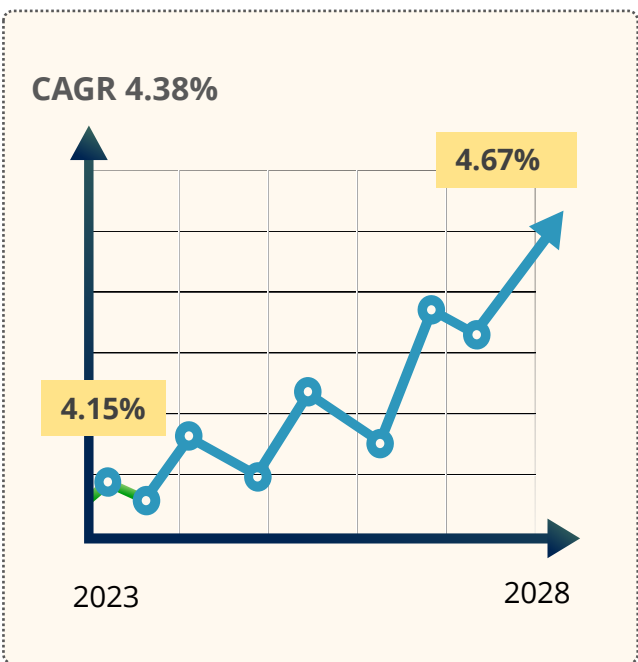
KEY SEGMENTS



PROJECT REVENUE (\$ Mn)



GROWTH RATE



WEST: MARKET OVERVIEW



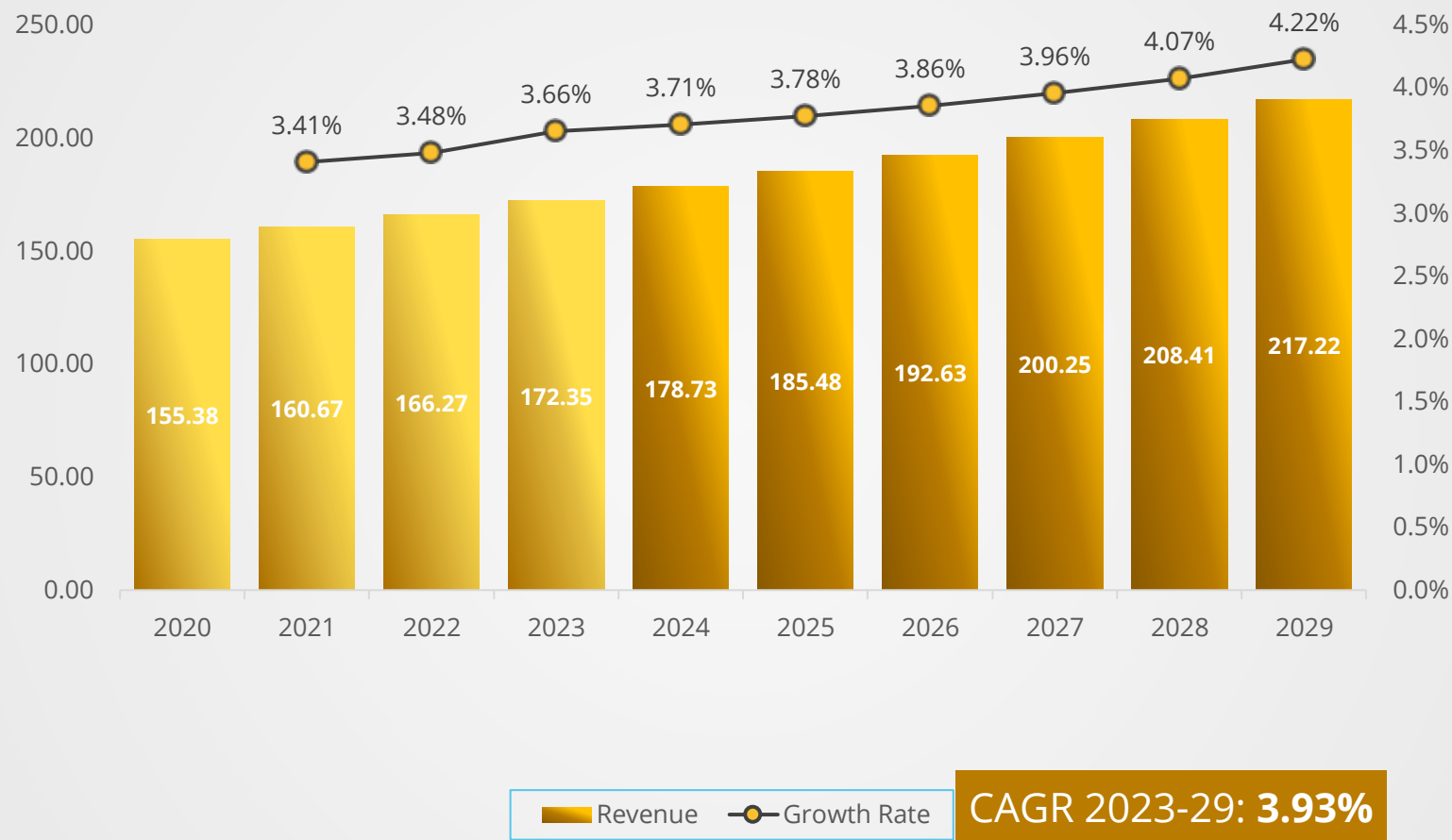
In 2023, the Western region dominated the market with a share of 40.60% and was valued at **\$172.35 million**, growing at a CAGR of **3.93%**.



- The study reports the western region, including Alaska, California, Colorado, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, Washington, and Wyoming. The west region has a strong presence of assisted living facilities. Based on the American Health Care Association and National Center for Assisted Living Report 2022, the western region has a 40.8% helped living communities compared to other regions. This region is a major use of mobile medical imaging due to the increased number of patients.
- In 2020, the prevalence of Alzheimer's in California accounted for 690,000 population and is expected to reach 840,000 by 2025, showing a 21.7% change. The rising prevalence of Alzheimer's in the states will drive high market growth. In 2019, the general population aged 65 and above accounted for 14.4% of residents in the state. Approximately 3% of California residents depend on Medicaid for long-term care. In the US, California has a higher aging population, with 5,148,448 residents aged 65 and above.
- The western region of the US is of larger area and has more developing states. This region has a large volume of smaller clinics and physician offices. This increases the market of adoption of advanced services, such as mobile medical imaging services.
- Low-quality healthcare is one of the major factors that restrict US healthcare. The prevalence of low-quality healthcare is high in this region compared to other regions. This makes companies invest in infrastructure, such as imaging equipment.

MARKET SIZE & FORECAST

West- Market Size & Forecast (\$ Mn)



In 2023, the western region segment accounted for

40.60%



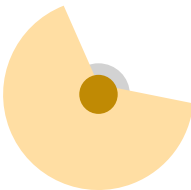
In 2029, the western region will account for

39.57%



Absolute Growth Rate 2023

26.04%



Incremental Growth 2028

44.87 Mn

SOUTH: MARKET OVERVIEW



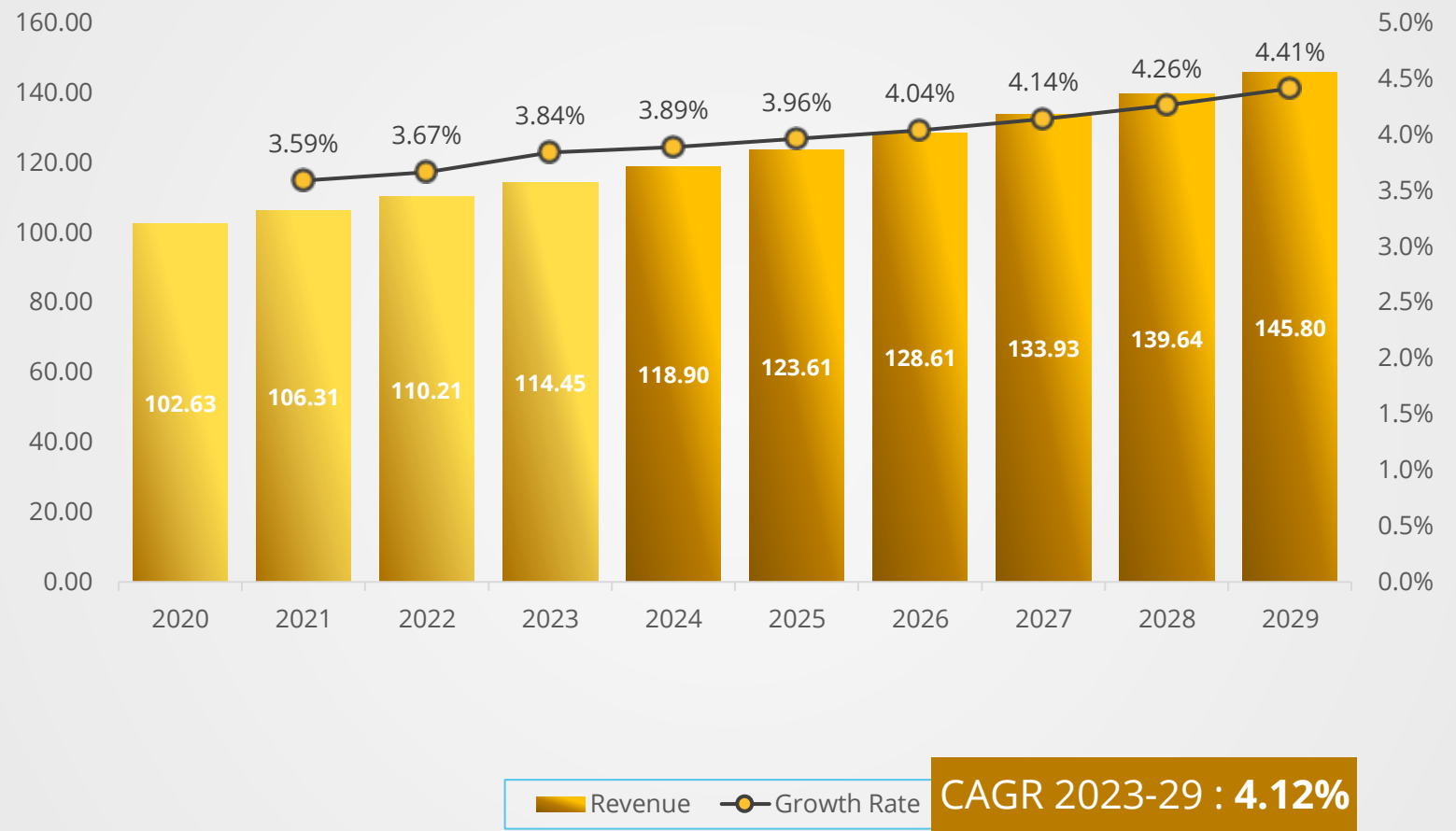
In 2023, by geography, the southern segment dominated the market with 26.96% market share and was valued at **\$114.45 Million**, growing at a CAGR of **4.12%**.



- Increasing number of end-users like assisted living facilities, long term care facilities, physician offices are increasing the demand for usage of mobile medical imaging service
- The southern region of the US accounted for the second highest market growth for assisted living facilities. The presence of more states, such as Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, Missouri, North Carolina, South Carolina, Tennessee, Virginia, & West Virginia states are included in the southern region.
- In the southern region, Florida has many assisted living facility communities. Florida is home to a higher aging population in the US, accounting for 3,926,889 seniors aged 65 and above.
- In 2022, Georgia was one of the emerging markets in the US for assisted living facilities. Approximately 900 assisted living facilities are available across Georgia.
- Missouri is known for the most economic assisted living facility providers in the US and the southern region. Yearly, only \$34,000+ cost is required for assisted living facilities in the state.
- As of 2020, North Carolina accounted for high growth, with presence of more than 500 AL communities, which serve an average of around 35 ordinary people. A North Carolina-based assisted-living community states that 40% of residents are 85-years-and older. Increasing population base in these settings pushes the demand for mobile medical imaging.
- As of 2020, South Carolina had over 250 assisted living communities, with 12,300 beds, serving around 42 average number people per community.
- Increasing the target population and growing independent living through assisted living facilities and home care drive the market in this region.

MARKET SIZE & FORECAST

South- Market Size & Forecast (\$ Mn)



In 2023, the southern region segment accounted for

26.96%



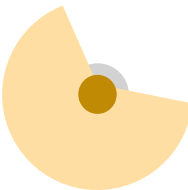
In 2028, the southern region segment will account for

26.56%



Absolute Growth Rate 2023

27.39%



Incremental Growth 2028

31.35 Mn

MID-WEST: MARKET OVERVIEW



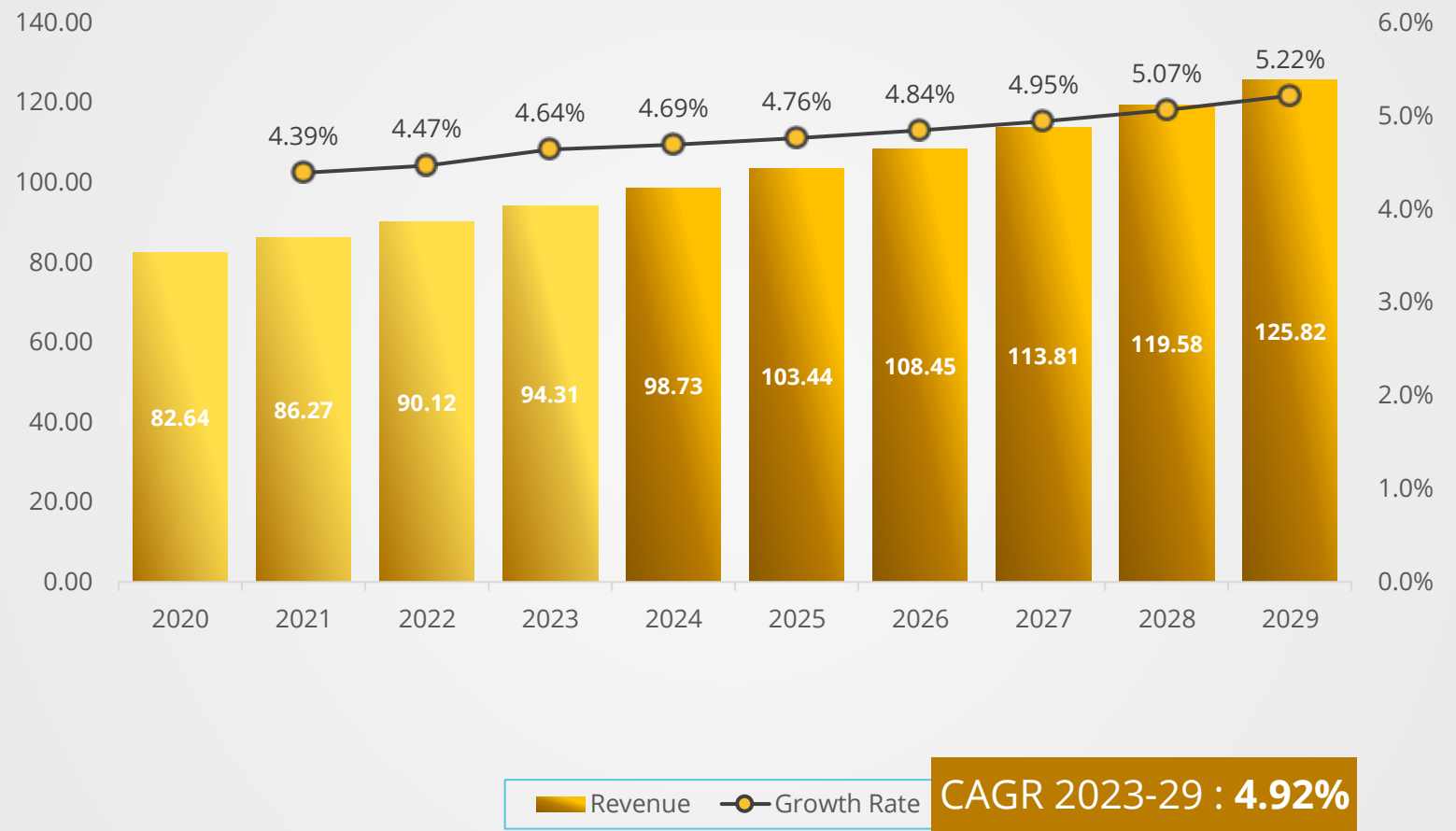
In 2023, the mid-west segment accounted for a share of 22.21% and was valued at **\$94.31 million**, growing at a CAGR of **4.92%**.

- In the Midwest region, around 12 states are included, such as Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.
- The mid-west population in the US accounts for around 20% of the population. The number of people increasing in this area has increased the number of ASCs demand in the market. Cardiac diseases, cancer, lung disease, stroke, and kidney diseases are some of the commonly treated disease conditions in this region.
- The assisted living facilities in this region have become more affordable, driving the elderly and aged to move toward the ALF. The ALF provides mobile medical imaging as a part of its service in the market.
- The Mid-west region has better infrastructure, and the number of medical imaging centers in this region is high. This has minimal opportunity for the mobile medical imaging service providers.
- The number of mobile medical imaging providers in the mid-west region is comparatively lower compared to other regions. This has increased the number of new companies to invest in this region.



MARKET SIZE & FORECAST

Mid-West- Market Size & Forecast (\$ Mn)



In 2023, the mid-west segment accounted for

22.21%



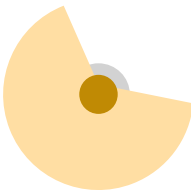
In 2028, the mid-west segment will account for

22.92%



Absolute Growth Rate 2023

33.41%



Incremental Growth 2028

31.51 Mn

NORTH EAST: MARKET OVERVIEW



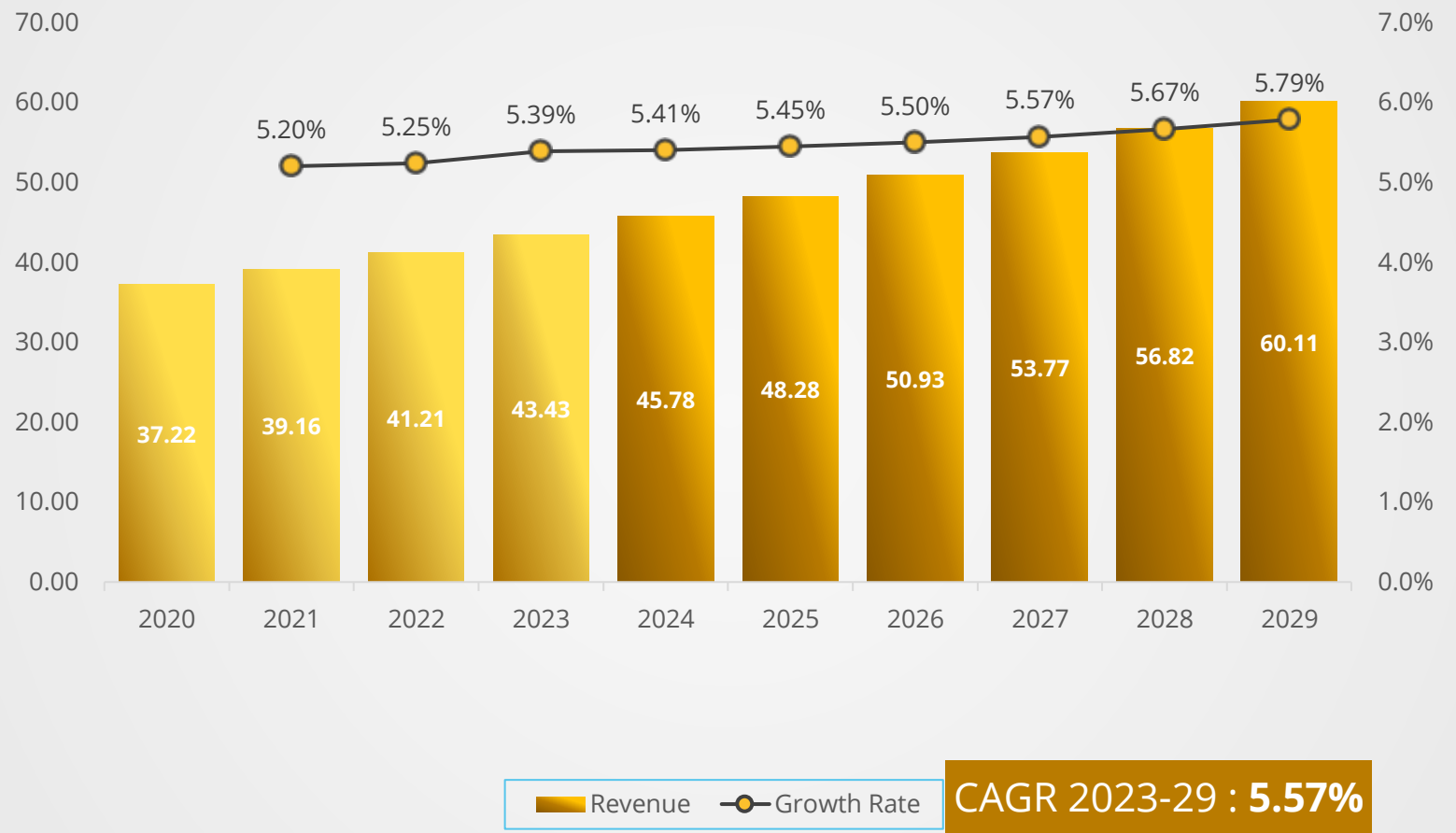
In 2023, by geography, the northeast segment market was valued with a 10.23% market share and was valued at **\$43.43 million**, growing at a CAGR of **5.57%**.



- Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont states are included in the northeastern region.
- The northeast population accounts for around 17% of the total population of the US. The increasing geriatric population in this region has increased the demand for better healthcare, including medical imaging in the region.
- New York is the epicenter of most infectious diseases, and the increasing number of patients with cardiac conditions and kidney disease has also increased the number of healthcare settings in this state. The rising population will increase the number of imaging centers.
- This region is one of the well-developed regions of US . The affordability of high-quality medial services, including the mobile medical imaging service has increased from new set of customers, such as individuals, corporate companies and sports event managers.
- In 2019, in New Jersey, around 16.1% of the population accounted for the 65+ age group. In 2020, more than 200 assisted living facilities were available. Most of the senior population in the northeastern demands living in assisted living facilities. This is due to affordable prices and the rising retirement budget. Increasing the number of people staying in assisted living facilities has increased the demand for mobile medical imaging services in the market.

MARKET SIZE & FORECAST

Northeast- Market Size & Forecast (\$ Mn)



In 2023, the northeastern region accounted for

10.23%



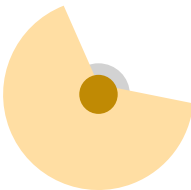
In 2028, the northeastern region segment will account for

10.95%



Absolute Growth Rate 2023

38.40%



Incremental Growth 2028

16.68 Mn

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MARKET DYNAMICS

MARKET OPPORTUNITIES & TRENDS (1/2)

INCREASING DEMAND FOR MOBILE ULTRASOUND SERVICE

The use of hand-held ultrasound in point-of-care settings, especially in mobile healthcare settings, has increased, and end-users use such portable imaging equipment in numerous medical specialties, including urology, gastroenterology, and vascular therapy areas. Hand-held ultrasound devices for short tests and preliminary screening have benefitted the healthcare sector.

One disadvantage of the growing use of ultrasound is that it is not portable.

INCREASING DEMAND FOR VEHICLE BOUND MOBILE IMAGING DEVICES AND UNITS

The use of mobile imaging modalities overcomes the demerits of fixed imaging equipment, such as the capital investment involved in installing equipment, which is very difficult to remove once installed. The rise in demand for mobile imaging systems includes decreased waiting lists and easy accessibility. Mobile imaging services interact between various healthcare and relocation of the units based on the fixed schedule or patient load in each facility. Therefore, the facilities can benefit from the improved patient care and revenue associated with the unit.



RISE IN THE NUMBER OF MEDICAL IMAGING PROCEDURES

The demand for almost all aspects of diagnostic procedures is increasing yearly. There is a widespread consensus that the demand for diagnostic procedures will continue to rise with the increasing prevalence of chronic illnesses.

The increase in the demand has been driven partly by an increase in imaging activity across many aspects of acute hospital activity, with a particular surge in demand from urgent referrals for cancer (10% per year) imaging. Broader indications for tests, such as CT scanning, fuel the need for medical imaging.

CT scanning (6.8% per year), MRI scanning (5.6% per year), PET-CT (18.7%/year), non-obstetric ultrasound (3.8% per year), and Dual-energy X-ray absorptiometry (DEXA) (4%/year). Plain X-ray is an exception, where annual growth has been less than 1%, and Cardiorespiratory diagnostics: Echocardiography (5.7%/year)



MARKET DRIVERS



INCREASING NUMBER OF ASSISTED LIVING FACILITY

Independent living communities have constantly increased recently across the US due to various factors in the market. There is a huge shift from nursing homes and home care facilities to independent living communities. The AF is cost-effective and has many advantages over other older care facilities. For seniors, independent living communities offer plenty of benefits. There is a significantly increasing aging population in the country, driving the demand for independent living facilities in the US. In 2019, around 92% of the US senior population showed a stabilized occupancy trend for independent living.



INCREASING NUMBER OF IMMOBILIZED PATIENTS

In the US, the increasing prevalence of Alzheimer's & dementia is a major factor that make the senior people to enroll for assisted living communities. As of 2023, more than six million of the American population have Alzheimer's, and by 2050, the projected prevalent population will be 13 million, which means almost double. On the other side, in 2023, it was hypothesized that novel SARS-COV-2 contributed to an increase of 17% in Alzheimer's and dementia. In the US, around one in three people die due to Alzheimer's dementia. In 2022, the nation's cost of care for Alzheimer's and other dementias was \$321 billion, and it is expected to rise \$1 trillion by 2050.



Increasing Benefits of Mobile Medical Imaging

There is a constant increase in target population in the market. The mobile medical imaging service has fulfilled the demand of the market with better benefits, such as increased accessibility, cost efficiency, rapid response in emergencies, high patient convenience, and increased quality of treatment. These benefits have increased the number of hospitals, smaller clinics, and corporations using mobile medical imaging.

MARKET RESTRAINTS



HIGH COST OF MOBILE MEDICAL IMAGING SERVICE

Mobile medical imaging is one of the most patient-friendly in the market. However, this has increased the service cost. The entire equipment needs to be set up in one place. This increases the cost of the service provided. This is profitable for many large companies. However, when the mobile medical imaging service is provided for a shorter duration, that increases the cost of expenditure for the user.



LACK OF IMAGE QUALITY

Mobile medical imaging has a major limitation. It cannot match the image quality that is produced in a hospital. Due to the use of very basic model equipment, the image quality is low. However, the final image quality depends on the equipment used. However, this was considered a myth and reduced the adoption of mobile medical imaging services.



High Competition From Standalone Medical Imaging Centers

Standalone medical imaging centers provide high-quality services at lower cost. This increases the competition among the mobile hospital-based and standalone imaging centers. The standalone imaging centers partner with smaller clinics and hospitals and provide the service at a lower cost. However, this is not feasible for the mobile imaging companies. This reduces the adoption of mobile medical imaging services. Companies should come up with better solutions to increase market penetration.

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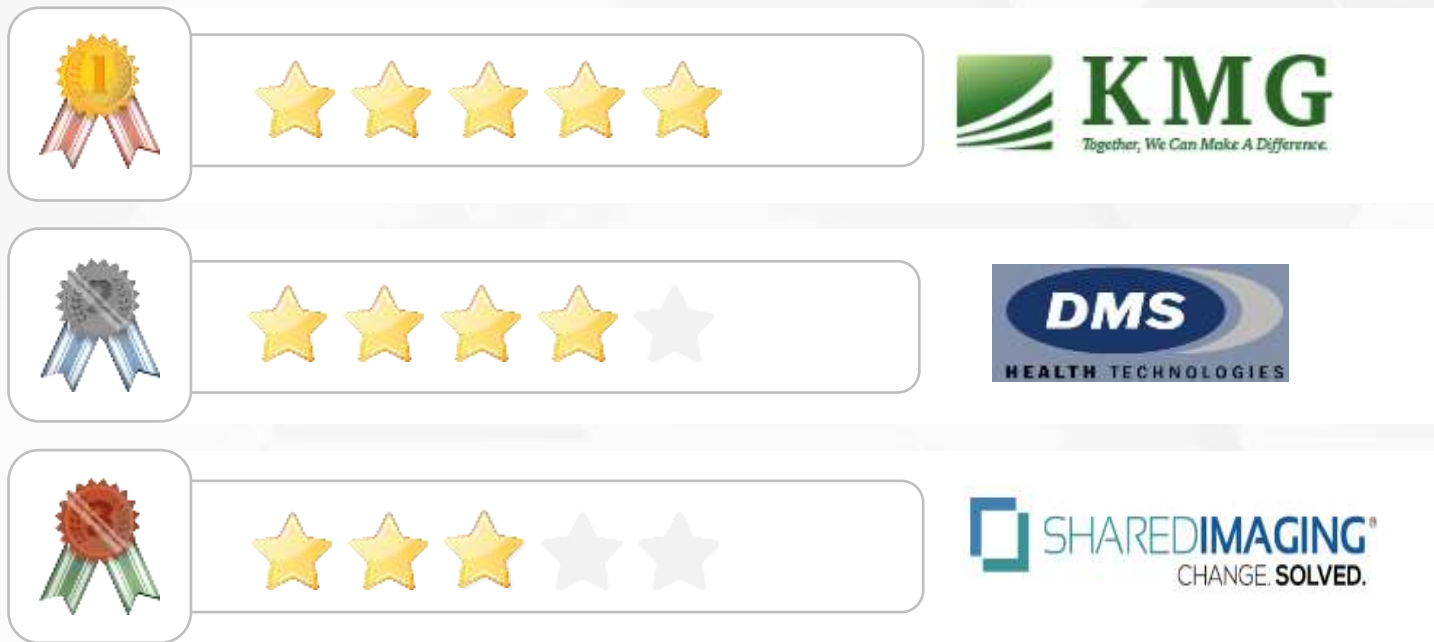




COMPETITIVE LANDSCAPE

COMPETITIVE LANDSCAPE

RATING



The market is highly fragmented, with multiple players in the market. No significant player in the market has over more of the market share. Top players account for less than half of the market share.



Vendors, such as KMG, DMS, Shared imaging companies have better market presence and have been in the market for many years serving a wide range of customers in the US market. Some of the companies have a significant market share through inorganic growth. Consolidation happens in the mobile medical imaging segment to provide service for a wide geographic region.



Huge investments are made by the top players in the market, especially in the technology and infrastructure, to attract customers. These vendors compete with the medical imaging laboratories to occupy the US market share.

KEY COMPANY PROFILES

KMG



This company has more than 40 years of experience in the mobile medical imaging service. The company has more than 200 clients across the US , providing fixed and interim imaging service. The company works to provide tailored solution to the customers. The company provides interim CT, PET, CT , Cath Lab and more modalities

Service Offerings:

Interim MRI

Interim CT

Interim PET/CT

SHARED IMAGING



Shared Imaging company has partnered with hospitals, healthcare providers for more than 30 years to provide better imaging solutions. Share Imaging company has received joint commission gold seal of approval demonstrating better patient safety and quality of care with innovative solutions

Service Offerings:

Mobile MR, PET/CT, CT

DMS HEALTH



DMS Health is one of the largest mobile imaging service providers of the US market. DMS operates and owns a fleet of mobile medical imaging specialties like CT, PET/CT, MRI and more. The company has earned joint commission gold seal of approval and accreditation for various modalities. The company works with leading manufacturers to get the specialized products for their specialty

Service Offerings:

Mobile CT, MRI

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OTHER COMPANY PROFILES

OTHER COMPANY PROFILES (1/6)

DIGIRAD



Headquartered in Georgia, the US, Digirad Corporation specializes in offering a comprehensive range of imaging services, mobile nuclear cardiology services, and nuclear medicine support services. The company has a team of highly qualified professionals who specialize in providing a wide range of diagnostic healthcare services.

Service Offerings:

Mobile Nuclear Cardiology

SHARED MEDICAL SERVICE



Shared Medical Services provides complete diagnostic imaging solutions to meet the clinical, financial, and operational goals of hospitals. The privately-held company is based in Illinois, the US, and specializes in imaging lifecycle management, flexible transaction structures, mobile CT/MRI/PET, custom service solutions, proprietary computed tomography/MRI/PET, and spare parts inventory, quality assurance, modular construction, and temporary CT/MRI.

Service Offerings:

Mobile, MRI, CT

ACCURATE IMAGING DIAGNOSTICS



Headquartered in Ontario, Canada, the company specializes in medical imaging, bone mineral density analysis, and mobile ultrasound. The company specializes in general ultrasound services, including abdominal, pelvic, anorectal, obstetric, small parts, thoracic, muscular osteoarthritis, and ultrasound-guided aspiration. The company operates in the Greater Toronto Area, including Richmond Hill, Markham, North York, York Region, and Peel.

Service Offerings:

Mobile Ultrasound

OTHER COMPANY PROFILES (2/6)

ATLANTIC MEDICAL IMAGING



Atlantic Medical Imaging was founded in 1964 in New Jersey, US. The company has 52 board-certified radiologists and 650-member staff. The company is focused on providing quality patient care while delivering accurate results with a fast turnaround. The company specializes in MRI, CT, PET/CT imaging, 3D mammography, ultrasound, DEXA scans, fine needle aspirations, core biopsies, nuclear imaging, and X-rays.

Service Offerings:

Mobile medical imaging

ONSITE IMAGING



Onsite Imaging has been a provider of mobile diagnostic services in South Florida since 2009. The company adheres to the requirements for accreditation and certification by The Joint Commission. Joint Commission clinical standards of excellence are recognized nationwide and are synonymous with the highest quality of care. The company has dedicated facilities that can offer convenient and cost-effective diagnostic services and improve patient satisfaction.

Service Offerings:

Mobile Ultrasound

JACKSONVILLE / FIRST COAST MOBILE IMAGING SERVICES

JACKSONVILLE MOBILE IMAGING
SERVICES INC

The company has served in the North Florida since 1992 and offers unequalled quality diagnostic services. The company is affiliated with the Florida Alliance of Portable X-ray Providers (FAPXP), National Association of Portable X-ray Providers (NAPXP), Florida HealthCare Association (FHCA), Northeast Florida Association of Director of Nursing Administration (NEFADONA), American Medical Association (AMA), National Association of Long-Term Care (NALC). X-ray, EKG, Ultrasound, and other diagnostic services of the company use the most sophisticated equipment.

Service Offerings:

Mobile medical Imaging

OTHER COMPANY PROFILES (3/6)

ALLIANCE-HNI HEALTH CARE SERVICE



Founded in 1986, Alliance-HNI Health Care Services specializes in delivering customized radiology and healthcare-related solutions to hospitals and physician practices. The company partners with hospitals and physicians to deliver radiology and oncology services across the US. The company provides quality clinical services to over 60 hospitals and other healthcare partners in Michigan.

Service Offerings:

Mobile medical Imaging

MANTRO MOBILE IMAGING



Headquartered in Nevada, the US, the company was founded in 2008. The company is focused on X-rays, ultrasounds, EKGs, echocardiograms, and PICC line insertion services. The company offers medical imaging services through California, US office. The company employs technologists certified by ARRT, ARDMS, and CCI.

Service Offerings:

Mobile X-Ray

ULTRA-X-IMAGING



Ultra-X Imaging delivers mobile X-ray and ultrasound services to skilled nursing facilities, assisted living facilities, in-home patients, and hospice patients in Michigan, the US. The company is based in Michigan, the US and was established in 2015. It is focused on mobile testing, mobile X-ray, mobile ultrasound, X-ray services, ultrasound services, nursing homes, assisted living communities, patient homes, correction facilities, hospice patients, skilled nursing facilities, community living, home care companies, home care, visiting doctors, and visiting physicians.

Service Offerings:

Mobile X-Ray and ultrasound

OTHER COMPANY PROFILES (4/6)

MODULAR DEVICES



Modular devices offers short-term and long-term rental of modular labs like Cath Labs, CT labs to hospitals and healthcare facilities across the US and North America. The company has more than 250+ presence in the US. The company has more than 35 years of experience in this segment. In 2023, modular labs acquired interim diagnostic imaging

Service Offerings:

Mobile CT Labs

Mobile PET, CT labs

INTERIM DIAGNOSTIC IMAGING



Interim diagnostic imaging company was founded in 2003 and This company provides mobile MRI systems housed in a self-contained mobile trailers. These MRIs are designed to meet wide range of end-users needs in the US. Their medical imaging equipment can be rented from two months to two years.

Service Offerings:

Mobile MRI

Mobile CT

FRONT RANGE MOBILE IMAGING



Front Range Mobile Imaging (FRMI) specializes in providing advanced medical imaging solutions and services. The company offers a comprehensive range of services, including computed tomography, magnetic resonance imaging, and positron emission tomography combined with computed tomography. The company also provides the experience and resources to create and develop successful ambulatory radiology programs.

Service Offerings:

Mobile medical Imaging

OTHER COMPANY PROFILES (5/6)

PORTABLE MEDICAL DIAGNOSTICS



PMD is one of the significant players in the mobile imaging market. The company has more than 30 years of experience in the medical imaging segment. The company has significant presence in Florida. Mobile x-ray, mobile ultrasound, EKG, Holter Monitor, and more services are provided by the company.

Service Offerings:

Mobile X-Ray ,
Mobile Ultrasound

MPX



The company has significant presence in the US and Canada. The company has more than 25 years of experience in the mobile medical imaging market. The company provides products for rentals and for lease and is one of the leading service providers in the mobile CT segment.

Service Offerings:

Mobile CT

CATALINA IMAGING



Catalina has more than 30 years of experience in the mobile medical imaging segment. The company has very good patient satisfaction compared to other companies in the market. The company has significant market share in the CT segment, and it closely works with the manufacturers to produce better image quality

Service Offerings:

Mobile CT

OTHER COMPANY PROFILES (6/6)

ALPHA ONE IMAGING



Alpha One Imaging is headquartered in Louisiana, the US, and is a sole proprietorship. The company employs a team of JCAHO-certified radiologists and licensed technicians. It provides high-quality, affordable, portable radiology, ultrasound, and ECG services 24/7 throughout Louisiana.

Service Offerings:

Mobile X-Ray

TRIDENT CARE



Trident Care is a privately held provider of long-term care laboratory and mobile imaging services. The company is headquartered in Maryland, the US, and operates in 43 states to provide imaging, laboratory, clinical, and at-home services to over 5,000 of the country's 16,000+ long-term care facilities. It has partnered with digital imaging manufacturers and software providers to offer a comprehensive array of hospital-grade digital X-ray services.

Service Offerings:

Mobile X-Ray

US MOBILE IMAGING



The company provides both equipment and staffing as service. The company staffs have more than 30 years of experience in the imaging segment. The company has mobile MRI, mobile CT and also provides animal scans as well. The company serves in the mid-Atlantic region

Service Offerings:

Mobile CT, MRI

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MARKET DYNAMICS

COMPETITIVE
LANDSCAPE



OTHER COMPANY
PROFILES

STRATEGIC
RECOMMENDATIONS



QUANTITATIVE
SUMMARY

ABBREVIATIONS





STRATEGIC RECOMMENDATIONS

STRATEGIC RECOMMENDATIONS



Tailored Solutions

Many key vendors in the market are providing tailored solutions to the customers in the market. Companies are customizing the solutions as per the end-user requirements.



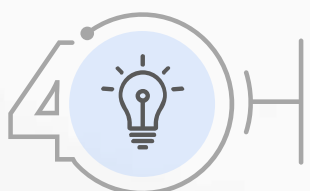
Impact of COVID-19

The demand for mobile medical imaging was low in the market. However, the market growth increased post COVID-19 as the number of customers increased.



Constant investments in Technology

Several mobile medical imaging service providers constantly invest in advanced technology to increase customer accessibility.



Inorganic Growth

Vendors, especially global players, must pursue inorganic growth strategies, such as acquisitions, to expand their presence, enhance their specialty, and improve their expertise.

EXECUTIVE
SUMMARY



MOBILE MEDICAL
IMAGING SERVICE
OVERVIEW

SERVICE TYPE
INSIGHTS



END-USER INSIGHTS

GEOGRAPHY
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QUANTITATIVE SUMMARY

QUANTITATIVE SUMMARY (1/3)

MARKET SIZE & FORECAST (\$ MILLION)								
TOTAL MARKET SIZE	2023	2024	2025	2026	2027	2028	2029	CAGR
REVENUE	424.53	442.15	460.81	480.62	501.77	524.45	548.94	4.38%

SERVICE TYPE: MARKET SIZE & FORECAST (\$ MILLION)								
PARTICULAR	2023	2024	2025	2026	2027	2028	2029	CAGR
X-RAY	105.86	110.01	114.40	119.06	124.03	129.35	135.09	4.15%
CT SCAN	86.93	91.08	95.50	100.21	105.25	110.67	116.54	5.01%
ULTRASOUND	76.75	80.03	83.50	87.18	91.12	95.34	99.91	4.49%
MRI	53.53	56.67	60.02	63.63	67.52	71.72	76.30	6.09%
OTHERS	101.46	104.36	107.38	110.54	113.85	117.36	121.10	2.99%
TOTAL	424.53	442.15	460.81	480.62	501.77	524.45	548.94	4.38%

QUANTITATIVE SUMMARY (2/3)

END-USER: MARKET SIZE & FORECAST (\$ MILLION)

PARTICULARS	2023	2024	2025	2026	2027	2028	2029	CAGR
LONG TERM CARE FACILITIES	168.74	175.22	182.08	189.35	197.10	205.40	214.36	4.07%
HOME HEALTH	148.53	155.35	162.59	170.29	178.53	187.38	196.96	4.82%
PHYSICIAN OFFICE	52.61	54.87	57.27	59.82	62.54	65.46	68.62	4.53%
OTHERS	54.65	56.70	58.87	61.16	63.60	66.20	69.00	3.96%
TOTAL	424.53	442.15	460.81	480.62	501.77	524.45	548.94	4.38%

QUANTITATIVE SUMMARY (3/3)

GEOGRAPHY: MARKET SIZE & FORECAST (\$ MILLION)

PARTICULARS	2023	2024	2025	2026	2027	2028	2029	CAGR
WEST	172.35	178.73	185.48	192.63	200.25	208.41	217.22	3.93%
SOUTH	114.45	118.90	123.61	128.61	133.93	139.64	145.80	4.12%
MID-WEST	94.31	98.73	103.44	108.45	113.81	119.58	125.82	4.92%
NORTHEAST	43.43	45.78	48.28	50.93	53.77	56.82	60.11	5.57%
TOTAL	424.53	442.15	460.81	480.62	501.77	524.45	548.94	4.38%

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QUANTITATIVE
SUMMARY

ABBREVIATIONS



LIST OF ABBREVIATIONS

ASCs

Ambulatory Surgical
Centers

CDC

Center For Disease
Control

CT

Computed Tomography

GPOs

Group Purchase Officers

MRI

Magnetic Resonance
Imaging

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THANK YOU



US MOBILE MEDICAL IMAGING SERVICE MARKET **FOCUSED INSIGHTS**

CONTACT

+1-312-235-2040

+1-302-469-0707

info@arizton.com

enquiry@arizton.com