

MOBILE MEDICAL IMAGING SERVICES MARKET



GLOBAL OUTLOOK & FORECAST
2022–2027



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ABOUT US

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 insights delivered through our market research provide a comprehensive market analysis at every level of market segmentation in the industry.

Top leadership having more than **120**-man years of experience across varied industries



More than **1000+ clients** worldwide including various fortune **500** Companies



Pioneer

in adopting best research practices to ensure deeper insights



1 RESEARCH METHODOLOGY



2 RESEARCH OBJECTIVES



To outline and forecast the mobile medical imaging services market based on service type, end user, and geography

To offer wide-ranging market statistics with detailed classification along with the respective market size of each segment



To provide comprehensive information about factors that affect market dynamics

To analyze several micro-market indicators considering growth factors, market prospects, and contribution to the market strategically



To study market opportunities for participants and stakeholders by identifying high growth sectors in the global market

To examine the competitive scenario such as joint collaborations, mergers and acquisitions, R&D activities, and advanced development in the market

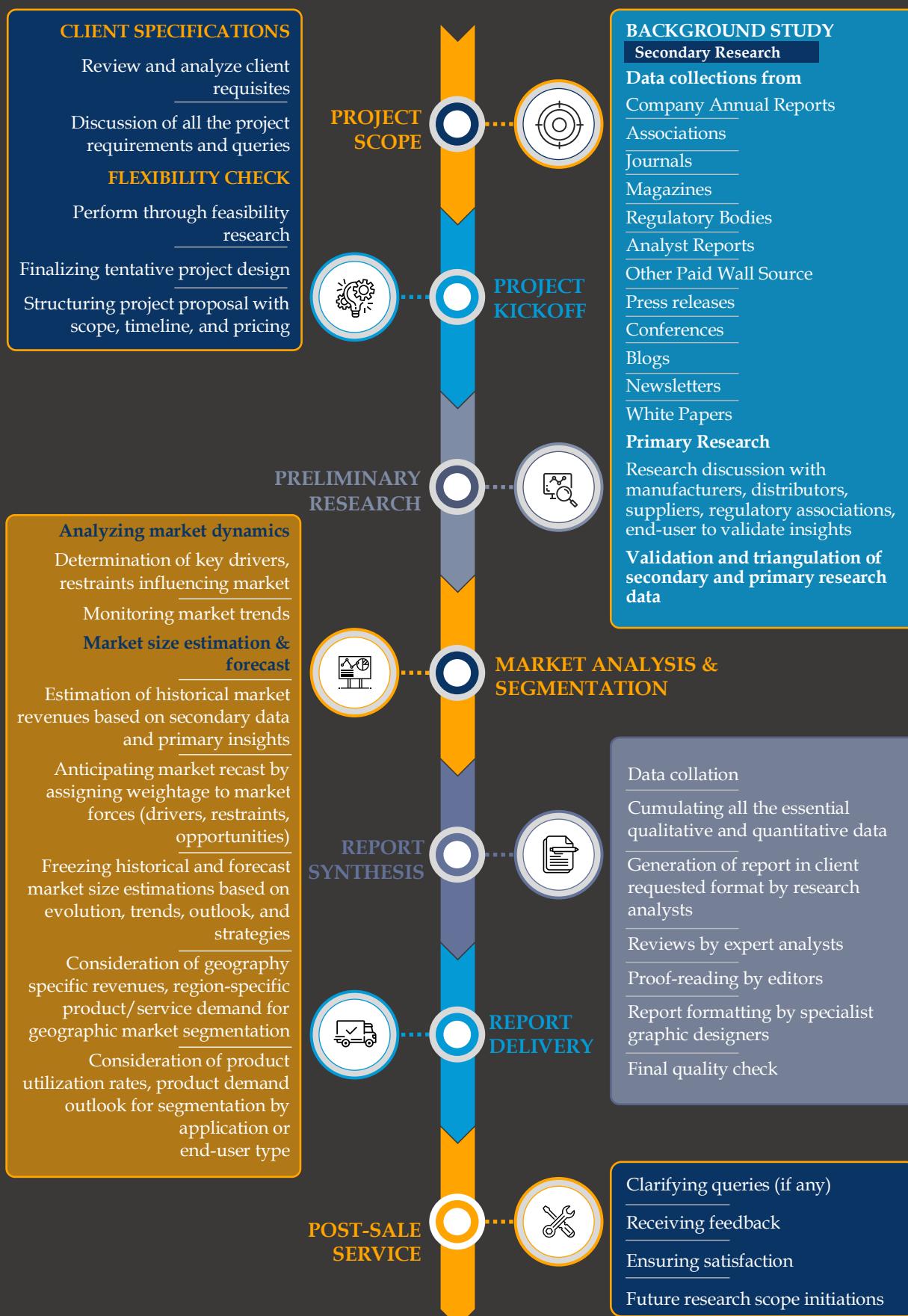


To predict the market size in geographical regions: APAC, Europe, Latin America, Middle East & Africa, and North America

To analyze key strengths, opportunities, and strategies of major companies operating in the market



3 RESEARCH PROCESS



4 SCOPE & COVERAGE

4.1 MARKET DEFINITION

Mobile medical imaging technologies have enabled healthcare providers to deliver cost-efficient and convenient diagnostic imaging solutions for aging societies and patients from other demographic cohorts. Mobile medical imaging services allow patients to get an early diagnosis in the comfort of homes, workplaces, or medical facilities. Also, healthcare professionals can access advanced and portable imaging equipment for different modalities, such as X-Ray, ultrasound, Computer Tomography (CT), Magnetic Resonance Imaging (MRI), and Positron Emission Tomography (PET), to deliver highly-efficient diagnostic medical examinations.

Additionally, mobile medical imaging services are ideal for sparsely populated areas and developing countries with limited access to healthcare services as they are comparatively cheaper than their stationary counterparts. Mobile medical imaging devices are designed to perform diagnostic procedures for different body parts, tissues, and organs for illness diagnosis, monitoring, and therapy. Since their introduction, mobile medical imaging platforms have continuously transformed the healthcare landscape. Factors such as the rise in the elderly population and acute and chronic disease incidences, the focus on efforts to minimize healthcare expenditure, and the shortage of practitioners, especially radiologists are expected to contribute to the high adoption of mobile medical imaging services. The surge in the prevalence of chronic and lifestyle diseases such as diabetes, hypertension, and cancer, along with the increase in surgical procedures due to the rise in accident and trauma cases will also drive the market growth. Mobile medical imaging service providers offer comprehensive X-Ray, CT, and ultrasound services directly to medical facilities, homecare settings, and healthcare businesses.

4.1.1 Inclusions

- Revenue generated from mobile medical imaging services based on service type and end user
- Revenue generated from mobile medical imaging services

4.1.2 Exclusions

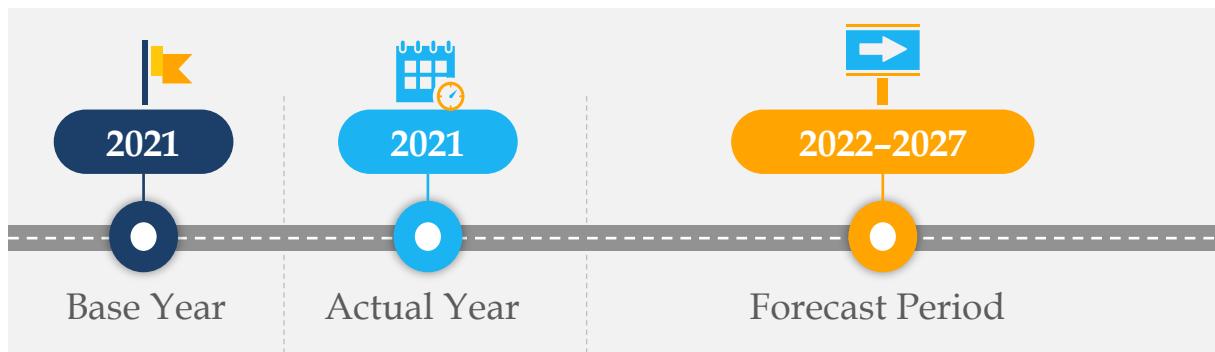
- › Revenue generated from the sales of medical devices
- › Revenue from companies with in-house medical imaging services
- › Revenue from medical device rental services

4.1.3 Market Estimation Caveats

- › The market size is estimated based on the **mobile medical imaging service providers' value**
- › The forecasted market figures are based on the **current or nominal value**
 - › **Current or Nominal Value:** Inflation has not been factored in while forecasting the market figures

4.2 BASE YEAR

The report considers **2021 as the base year**. The calculations in the report involving quantitative data are based on 2021. The values represented in the report are actual values for 2021, while **the values are estimated for the period 2022–2027**.



4.3 SCOPE OF THE STUDY

The report considers the present scenario of the global mobile medical imaging services market and its market dynamics for the period 2021–2027. It covers a detailed overview of several market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyzes leading companies and several other prominent companies operating in the market.

Exhibit 1 Segmentation of Global Mobile Medical Imaging Services Market



Source: Arizton

4.3.1 Market Segmentation By Service Type

- **Mobile X-ray:** Portable or mobile x-ray units are mobile diagnostic imaging equipment as they include wheels that allow them to be moved around a hospital or healthcare facility. These devices are propelled by a battery-powered electric motor, which makes it easy for a radiographer to drive the mobile unit. Also, mobile x-ray devices are used to perform chest radiography on patients who cannot be transported to the radiology department
- **Mobile Computed Tomography (CT) Scanning:** Computed tomography scanners are useful diagnostic tools on wheels, which are used to analyze multiple medical conditions. Several improvements in biomedical engineering have enhanced the speed and low-assessment detectability and photograph quality of mobile CT scanners and decreased their radiation levels. A portable or cell CT scanner has emerged as one such vital advanced diagnostic imaging solution, which is particularly beneficial for critically ill patients who require bedside scanning at healthcare facilities
- **Mobile Electrocardiogram (EKG):** Electrocardiogram (ECG or EKG) is a non-invasive device that enables the diagnosis of coronary heart problems. An EKG measures irregularities in the heart's rhythm and detects blocked or clogged arteries
- **Mobile Ultrasound:** A mobile ultrasound machine is a medical imaging machine that uses a non-invasive diagnostic technique to provide diagnostic imaging services in clinical, laboratory, and hospital settings. The mobile ultrasound systems are designed to be used in small spaces, at a patient's bedside, or in the field. The mobile ultrasound imaging equipment can be cart-based, tablet-based, or hand-held based on the requirements of healthcare providers and their patients
- **Mobile MRI:** Mobile MRI equipment is used in specially designed radiological clinics to scan internal organs and detect abnormalities such as neurological cancers, congenital heart diseases, and vascular diseases. A mobile MRI unit includes a scanner, control room, and a patient changing room if required. Mobile MRI services are particularly beneficial for patients who are unable to access healthcare facilities due to their medical condition or remote location
- **Others:** The segment includes nuclear medicine, mammography, bone densitometers, and stereotactic breast biopsy equipment

4.3.2 Market Segmentation by End Users

- › **Assisted Living & Nursing Homes:** The segment includes assisted living and nursing homes, which are healthcare facilities that provide continuous residential care for the elderly and medically disabled populations. This leads to advanced care management and rapid patient care strategies. The process of moving older adults from nursing homes and long-term care hospitals to medical care can be a psychologically and physically stressful experience medical imaging units are used
- › **Home Health & Hospice Care Facilities:** The segment includes home-based healthcare services for recuperating or disabled individuals or terminally ill patients who require home-based palliative care for a better quality of life. In such cases, mobile medical imaging plays an important role in delivering cost-effective and convenient diagnostic imaging solutions to patients who require end-of-life care. Also, mobile medical imaging services in hospice facilities enable proactive and preventive patient care through instantaneous access to diagnostic imaging data
- › **Long-term Acute Care Facilities:** The segment includes facilities that provide treatment to patients with serious medical conditions. These patients require long-term diagnostic care services on an ongoing basis instead of intensive care or extensive diagnostic procedures

4.3.3 Market Segmentation By Geography

KEY GEOGRAPHIES



NORTH AMERICA	LATIN AMERICA	EUROPE	MEA	APAC
<ul style="list-style-type: none"> › US › Canada 	<ul style="list-style-type: none"> › Argentina › Brazil › Mexico 	<ul style="list-style-type: none"> › Germany › U.K. › France › Spain › Italy 	<ul style="list-style-type: none"> › Turkey › Saudi Arabia › South Africa 	<ul style="list-style-type: none"> › Japan › China › India › Australia › South Korea

5 REPORT ASSUMPTIONS & CAVEATS

5.1 KEY CAVEATS

Table 1 Key Caveats

PARAMETERS	ASSUMPTIONS
 Economic Outlook	While forecasting the market outlook, no macroeconomic collapses and recessions are predicted about the global economic landscape
 Currency Fluctuation	Market forecasting was carried out under the assumption that the value of the USD (\$) is likely to remain constant during the forecast period
 Political Outlook	While arriving at the market size, the global political environment was assumed to remain stable during the forecast period
 Data Authenticity	Revenues and segment-specific information were derived from annual reports of respective companies. The information is assumed to be authentic. However, revenues for the non-listed companies were derived from various authentic publications, news articles, and primary sources
 Accuracy & Reporting	All figures mentioned in the study were rounded to the nearest decimal place. Thus, the summation of figures and percentages may differ by a margin of 0.01
 Vendor	This report provides a list of vendors that are active in the market across all geographical regions. The report identifies vendors based on their market revenue, dominance in terms of market experience, regional presence, product portfolio, financials, R&D expenses, and brand popularity

5.2 CURRENCY CONVERSION

The standard currency used throughout the report is USD (\$). However, in the case of other currencies, the annual average currency rate (January 1 to December 31) is used for conversion. These conversion rates are rounded to the nearest decimal place. The chart below shows the standard conversion rates used in the report.

Table 2 Currency Conversion 2015–2021

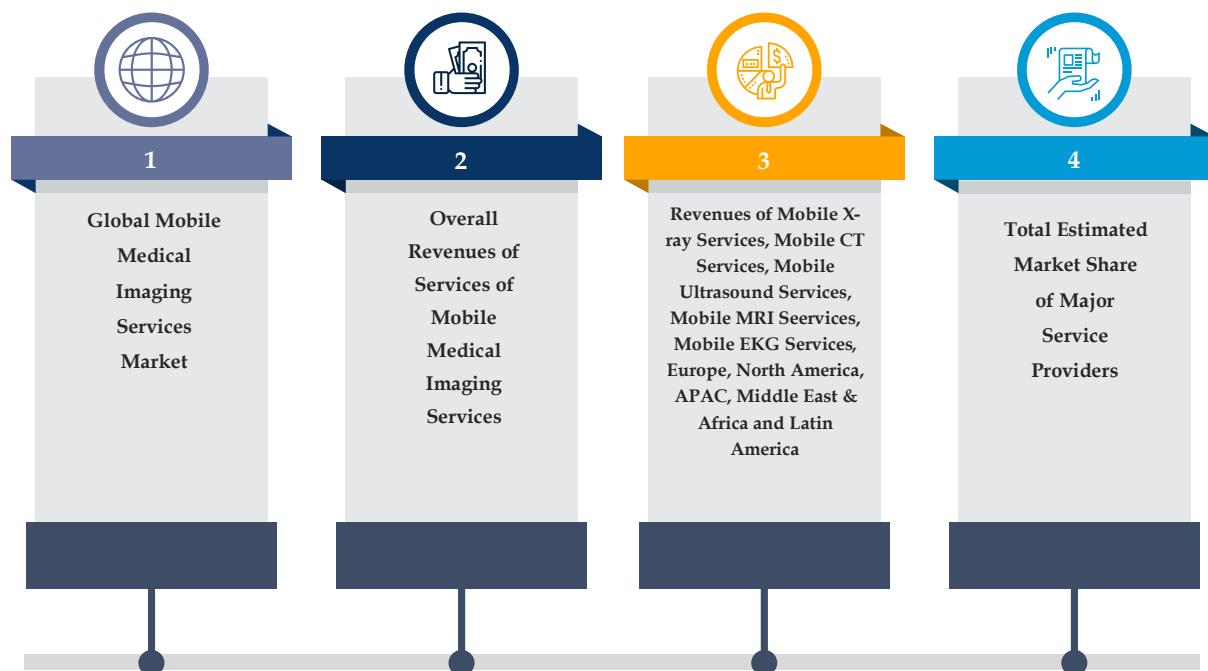
 Currency Conversion		2015	2016	2017	2018	2019	2020	2021
\$/€	USD/EUR	0.8969	0.8988	0.8605	0.8566	0.8914	0.8483	0.8517
\$/£	USD/GBP	0.6526	0.7309	0.7607	0.7586	0.7860	0.7709	0.7297
\$/¥	USD/JPY	120.9000	107.5269	113.8867	111.0019	109.0025	105.5210	110.5123
\$/₭	USD/SEK	8.4040	8.9328	8.4135	8.8826	9.4494	8.8134	8.6508
\$/A\$	USD/AUD	1.3112	1.3430	1.3042	1.3578	1.4354	1.4202	1.3549
\$/¥	USD/RMB (CNY)	6.1606	6.6100	6.6294	6.6675	6.8926	6.6788	6.4394

Source: Arizton

*The above exchange rate is the mean of month-end exchange rates computed for the last 12 months

5.3 MARKET DERIVATION

Exhibit 2 Market Size Calculation Approach 2021



Source: Arizton

The chart above shows the approach adopted to arrive at the market size of the Global mobile medical imaging services market in 2021 and the segments that are considered to derive the market value.

- The market size figures are primarily arrived at through the bottom-up approach and are then confirmed through the top-down approach
- The sales of major products were aggregated to arrive at an estimated market size in terms of revenue. An estimated 85%–90% of vendors' capacities are mapped and considered in the report calculations
- Segmental data were calculated through the bottom approach, which involves the analysis of segment-wise financials of key market players. The data is either derived from their annual filings or through primary research in the absence of the former
- Price trends for key related products were analyzed for the past few years and considered to derive the projections for the forthcoming six years using a set of forecasting techniques
- Also, the innovation and R&D efforts of several market players were studied and weighed in before arriving at the projections as they can potentially disrupt the market both in terms of consumption and buying patterns

- The effects of several macroeconomic and meso factors were also considered at each interval while arriving at the forecast



MARKET AT A GLANCE

6 MARKET AT A GLANCE

INSIGHTS

01

MARKET SIZE

CAGR
2021-2027
4.79%

\$1,417.12 MN

\$1,219.22 MN

\$1,070.00 MN



2021

2024

2027

INSIGHTS

02

GEOGRAPHICAL SEGMENTATION
(2021)

REGION	MARKET SIZE	CAGR
● NORTH AMERICA	\$431.21 MN	4.66%
★ EUROPE	\$283.55 MN	5.76%
▲ APAC	\$214.00 MN	5.14%
○ LATIN AMERICA	\$85.60 MN	2.73%
◆ MIDDLE EAST & AFRICA	\$55.64 MN	2.30%

INSIGHTS

03

EUROPE
(2021)

COUNTRY	MARKET SIZE	CAGR
★ GERMANY	\$56.71 MN	5.85%
★ UK	\$51.61 MN	6.05%
★ FRANCE	\$48.20 MN	6.27%
★ ITALY	\$28.36 MN	5.94%
★ SPAIN	\$22.68 MN	5.09%

INSIGHTS

04

NORTH AMERICA
(2021)

COUNTRY	MARKET SIZE	CAGR
US	\$392.40 MN	4.76%
CANADA	\$38.81 MN	3.67%

INSIGHTS

05

LATIN AMERICA
(2021)

COUNTRY	MARKET SIZE	CAGR
BRAZIL	\$26.02 MN	2.69%
MEXICO	\$21.83 MN	3.00%
ARGENTINA	\$22.60 MN	2.59%

INSIGHTS

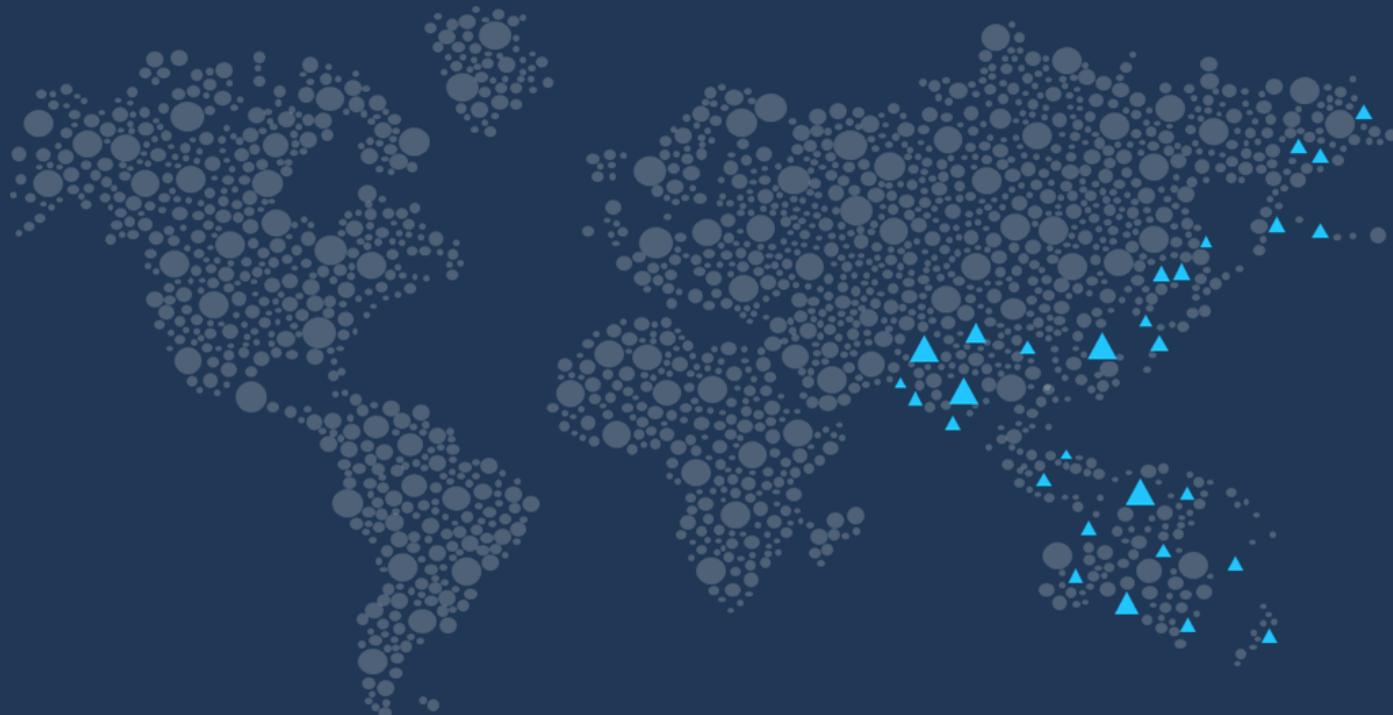
06

MIDDLE EAST & AFRICA
(2021)

COUNTRY	MARKET SIZE	CAGR
◆ TURKEY	\$15.63 MN	2.54%
◆ SAUDI ARABIA	\$12.52 MN	2.45%
◆ SOUTH AFRICA	\$10.63 MN	3.60%

INSIGHTS

07

APAC
(2021)

COUNTRY	MARKET SIZE	CAGR
▲ CHINA	\$51.36 MN	5.72%
▲ JAPAN	\$47.29 MN	4.66%
▲ INDIA	\$25.04 MN	6.31%
▲ AUSTRALIA	\$21.61 MN	4.79%
▲ SOUTH KOREA	\$17.55 MN	2.89%

INSIGHTS

08

SERVICE TYPE SEGMENTATION
(2020)

MOBILE X-RAY

\$267.22 MN



MOBILE CT

\$210.80 MN



MOBILE ULTRASOUND

\$189.38 MN



MOBILE MRI

\$124.92 MN



MOBILE EKG

\$104.94 MN



OTHERS

\$172.75 MN



INSIGHTS

09

END-USER SEGMENTATION
(2021)**ASSISTED LIVING
& NURSING HOMES**
\$233.75 MN**HOME HEALTH &
HOSPICE**
\$371.85 MN**LONG-TERM ACUTE CARE
CENTERS**
\$275.29 MN**OTHERS**
\$189.11 MN

INSIGHTS

10

MARKET OPPORTUNITIES
& TRENDS

1

TRANSITION OF DIAGNOSTIC IMAGE PROCESSING
TECHNIQUES FROM 2D TO 3D

For decades, 2D imaging has been the backbone of diagnostic imaging. The shift from 2D to 3D image capture has shaped the future of diagnostic imaging. 3D visualization is creating photorealistic images of the anatomy to help with surgery planning and interpretation of cancerous tumors. Innovations in CT and MRI scanners have enabled the production of clearer 3D images with extremely high resolution, less noise, and a lower radiation dose.



2

RISE IN ADOPTION OF HANDHELD ULTRASOUND
DEVICES

Portable ultrasound devices can be held within the palms of skilled examiners. The use of transportable ultrasound devices has increased during the last few years. The demand for these devices has flourished in the healthcare and medical imaging sectors. Ultrasound devices are portable, ideal for bedside use, and affordable. Many key players are manufacturing handheld ultrasound devices as they offer high efficiency. Thus, such benefits will drive the demand for handheld ultrasound devices across several regions worldwide..



INSIGHTS

11

MARKET ENABLERS

1

FOCUS ON DELIVERY OF HIGHLY EFFICIENT HEALTHCARE SERVICES

According to the International Journal of Critical Illness and Trauma Science, complications associated with the transportation of critically ill patients include potential risks to the respiratory system, loss of venous access, traumatic injury, acid-base homeostasis, hemodynamic risks, including glucose control, possible infection, and even death. Therefore, most healthcare providers adopt mobile imaging solutions to enhance their workflow and deliver efficient patient care.



2

LAUNCH OF ADVANCED MOBILE DIAGNOSTIC IMAGING DEVICES

Medical imaging technologies are undergoing a continuous transformation and contributing to a surge in the launch of state-of-the-art medical imaging equipment. The high focus on the delivery of efficient healthcare services, better accessibility to healthcare, and faster reaction time combined with lower prices. Thus, many vendors launch updated versions and new variants of mobile diagnostic imaging devices at regular intervals.



3

TECHNOLOGICAL DEVELOPMENTS IN MOBILE MEDICAL IMAGING

Several breakthrough innovations have reshaped the medical imaging field in recent years. Artificial and augmented intelligence and augmented and virtual reality combined with 3D imaging, combined with portable and wearable scanners have contributed to the development of innovative medical imaging technologies that improve patient outcomes across different therapeutic areas. Thus, numerous applications of medical imaging systems in gynecology, cardiology, and neurology are expected to promote the adoption of mobile imaging services and drive market growth.



4

SURGE IN DEMAND FOR VEHICLE-BOUND MOBILE IMAGING DEVICES

The rise in demand for vehicle-bound mobile imaging devices due to several advantages compared to conventional fixed imaging equipment will emerge as a key growth driver for the global mobile imaging services market during the forecast period. The surge in the availability of advanced mobile-based MRI options in the healthcare sector will provide a low-cost alternative for implementing cutting-edge technology, which will drive the growth of the market.



INSIGHTS

12

MARKET RESTRAINTS

CLAUSTROPHOBIA DURING MOBILE CT-SCAN OR MRI



MRIs, CT scans, PET scans, and bone scans require a body to be enclosed or semi-enclosed in a specific machine to capture clear images of the area of interest. For some individuals with claustrophobia, this can incite high fear, anxiety, and panic. Therefore, many patients refrain from going for diagnostic imaging tests, which may ultimately result in a decline in imaging tests. The drop in diagnostic medical imaging tests may prove to be a major loss for service providers, which may hamper the market growth.

EXPOSURE TO RADIATION SCATTER IN MOBILE CHEST X-RAYS



Scattered radiation or radiation scattering refers to a reduction in the level of contrast of a hidden X-ray image due to the introduction of additional quantum noise, which results in a considerable decline in image sharpness and an increase in background heterogeneity. The phenomenon often occurs when imaging thicker areas of the body (such as the chest), especially when the collimation distance is not close enough, which can result in image quality degradation.



INTRODUCTION

7 INTRODUCTION

7.1 OVERVIEW

The ever-changing healthcare environment presents many challenges for healthcare providers in terms of service integration and quality and financial constraints. Mobile diagnostic imaging technologies have enabled healthcare establishments to minimize their expenditure, improve imaging quality, and counter the shortage of medical practitioners. Most mobile diagnostic imaging devices are primarily designed to perform diagnostic procedures that provide detailed images of internal organs for efficient clinical analysis and medical intervention. The global mobile imaging market is witnessing considerable growth due to innovative applications of mobile medical imaging technologies in various therapeutic areas, such as cardiology, neurology, and gynecology.

Additionally, mobile imaging services are ideal for hospitals or healthcare facilities with low imaging volumes or facilities that do not offer specific imaging technologies. Most healthcare facilities with low imaging volumes and financial constraints do not prefer investing in fixed medical diagnostic imaging systems. However, mobile imaging is an ideal solution that enables healthcare facilities to provide efficient patient care and faster diagnoses to patients without having to invest in conventional medical imaging platforms. Mobile carriers visit senior housing communities, nursing homes, assisted living facilities, and other group settings to provide a comprehensive array of in-home mobile imaging tests on specific days. Also, providers of point-of-care medical screening solutions do not require expensive laboratory equipment or reservations in advance to offer specific diagnostic procedures.

With the surge in the demand for flexible diagnostic imaging solutions, most vendors in the market are expected to provide a comprehensive range of mobile imaging solutions that contribute to the market growth and meet the unique requirements of different categories of healthcare establishments and patients. The delivery of mobile medical imaging solutions is being powered by the latest diagnostic medical imaging equipment across several geographical regions. Factors such as the increasing cost of equipment, maintenance, and personnel have compelled many healthcare facilities to refer their patients to third-party diagnostic imaging service providers. However,

the challenges associated with transporting patients to third-party service providers can be addressed with mobile medical imaging equipment and services. There has been a considerable rise in the adoption of portable medical imaging devices, especially for patients with limited mobility. These devices act as intermediaries between medical staff and patients and capture images to provide the required screening tests, which are sent to a radiologist or physician for examination and treatment. Also, these devices incorporate technologies that enable near-instantaneous transmission and storage of digital images.

The surge in demand for various medical imaging procedures will propel the demand for different mobile diagnostic imaging modalities and drive the growth of the global mobile imaging services market. Also, the rise in the number of prescriptions for diagnostic imaging tests for chronic diseases is a major growth driver for the market. The scope of the applications of mobile diagnostic imaging equipment is expected to expand from diagnoses to biopsy and surgery. Although mobile MRI devices have emerged as the preferred mobile medical imaging equipment, they are relatively costlier than CT scanners. The high magnetic fields and radio waves in mobile MRI scanners enable instantaneous screening of internal organs such as the head, spine, heart, bones/joints, and abdomen.

Mobile imaging systems are designed for installation in large vans/trailers, which serve as mobile scanning rooms and can be shipped to various sites to provide advanced diagnostic imaging services. The global mobile imaging market is segmented based on service type and end user. Based on service type, the market is segmented into X-ray, ultrasound, Magnetic Resonance Imaging (MRI), Positron Emission Tomography/Computed Tomography (PET/CT), bone densitometry, and mammography. Based on end user, the market is segmented into nursing homes and assisted living facilities, home health and hospice facilities, long-term acute care centers, and other healthcare establishments.

North America is expected to emerge as the largest market for mobile medical imaging services, followed by Europe, which is attributable to technological advances, the digitalization of healthcare organizations, and the surge in awareness of mobile imaging technologies for diagnosing various diseases. Also, the growing demand for better quality healthcare facilities, rising healthcare costs, and improving local healthcare infrastructure are other growth drivers for these markets. The Asian

mobile imaging market is expected to grow rapidly in the coming years due to the unprecedented development of medical infrastructure, the rise in the prevalence of chronic diseases, high disposable income, and the expansion of the aging population in the region. Other parameters such as population and economic growth in developing countries such as India and China will support the growth of the Asian mobile imaging market.

Additionally, the rise in the number of government initiatives will contribute to a surge in the number of community health and cancer centers, which will drive the growth of the mobile medical imaging services market in developing economies. Other factors such as the high adoption of mobile imaging technologies and the rise in the number of patients and improved diagnoses for various diseases will drive the growth of the market. The increase in healthcare expenditure and the rise in the number of government initiatives to improve mobile imaging technologies worldwide are other growth drivers for the market. However, cost recovery issues and a high level of competition will result in moderate growth across the global market during the forecast period.

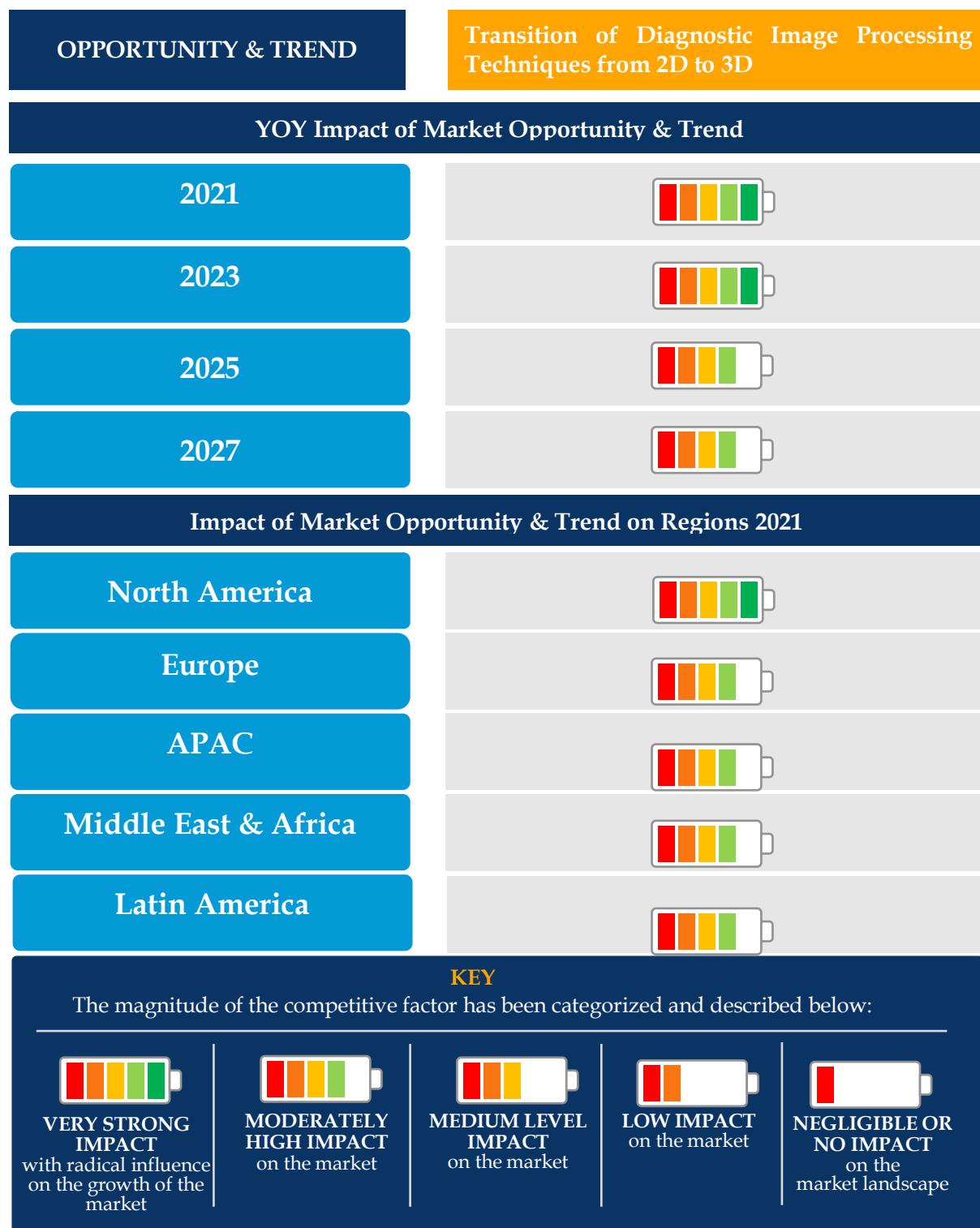


MARKET DYNAMICS

8 MARKET OPPORTUNITIES & TRENDS

8.1 TRANSITION OF DIAGNOSTIC IMAGE PROCESSING TECHNIQUES FROM 2D TO 3D

Exhibit 3 Impact of Transition of Diagnostic Image Processing Techniques from 2D to 3D



There are several ongoing R&D initiatives for mobile medical imaging devices, which will prove to be extremely beneficial for mobile medical imaging service providers. Such advances in mobile medical imaging procedures have tremendous scope to transform the healthcare landscape. The advantages of mobile medical imaging solutions include portability, communication technologies, continuous uninterrupted data stream, and power to support multimedia software applications, which are revolutionizing remote healthcare assistance and telemedicine. Currently, the use of mobile devices in the field of 3D medical imaging is still in a nascent stage.

In recent years, advances in imaging and computing technology have played an important role in the development of high-resolution imaging systems suitable for clinical studies. Conventional visualization procedures based on 2D medical images are prone to challenges associated with the interpretation of information due to the static nature of the content and lack of available volumetric data. Such limitations can be overcome by the shift in medical imaging preferences toward technologies that enable improved and enhanced depth of imaging structures. Also, the adoption of advanced diagnostic imaging technologies that enable the capturing of hard-to-image anatomical areas and systems will provide higher diagnostic confidence.

Within the last few years, the availability of several toolkits supporting medical image visualization and analysis has increased significantly. Moreover, the quality of such toolkits has improved in terms of functionality, robustness, and performance. Also, medical diagnostic imaging procedures have become more effective in terms of improvements in diagnosis, keeping the radiation dose as low as possible, and increasing efficiencies to minimize cost. These factors have enabled technological innovations in the medical imaging industry. For decades, 2D imaging has been the backbone of diagnostic imaging. The shift from 2D to 3D image capture has shaped the future of diagnostic imaging. 3D visualization is creating photorealistic images of the anatomy to help with surgery planning and interpretation of cancerous tumors. Innovations in CT and MRI scanners have enabled the production of clearer 3D images with extremely high resolution, less noise, and a lower radiation dose.

There is a growing usage of 3D and 4D imaging in CTs, X-rays, and MRIs. 3D CTs play an instrumental role in identifying bone fragment displacement and assessing developmental deformities in trauma cases. Multidetector computed tomography (MDCT) is being used to provide clinicians with images of children's lungs, replacing the need for invasive procedures and anesthesia. 3D virtual dissection is being used to produce 3D models of the colon, which enable physicians to virtually examine the

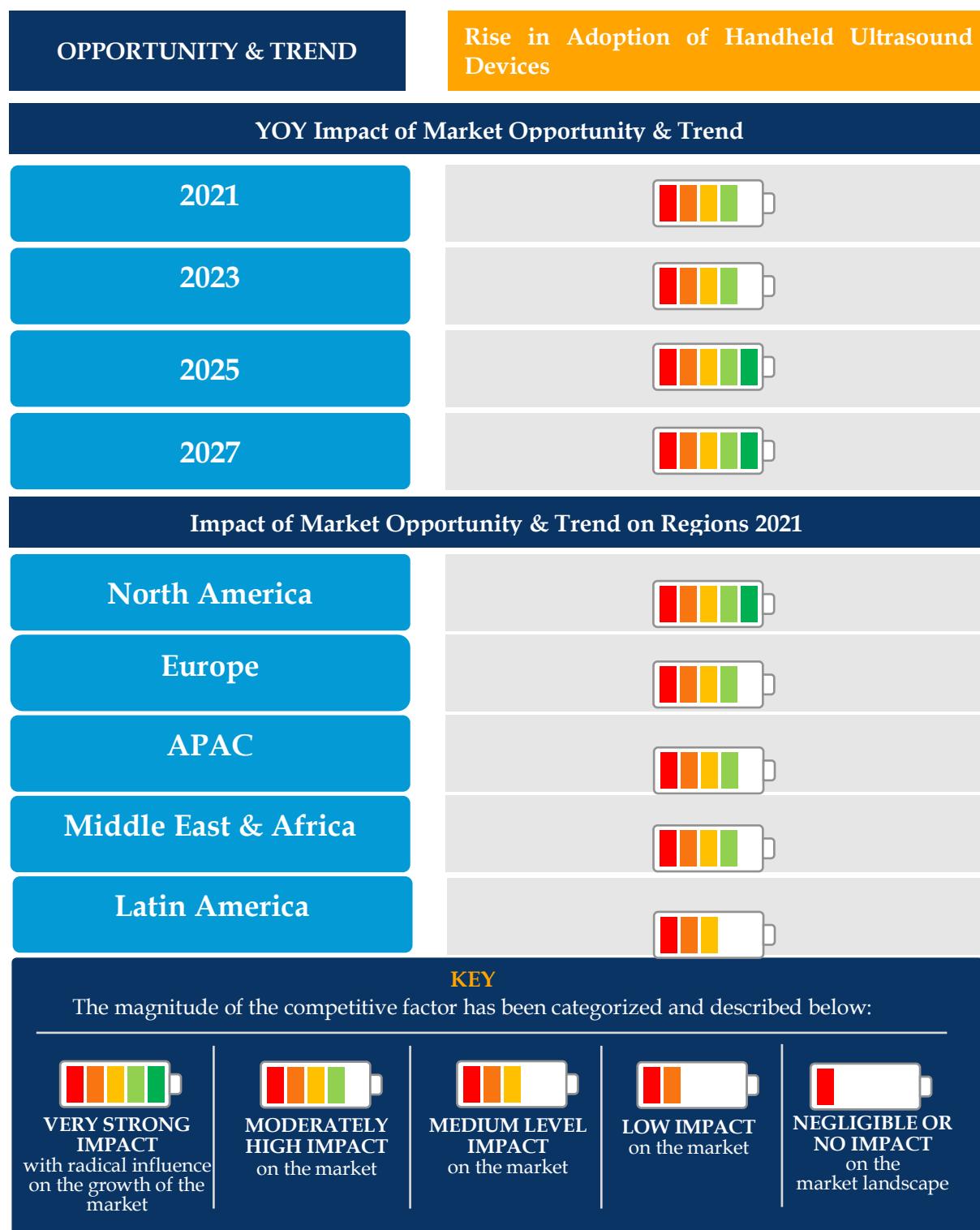
inner surface of the entire colon. Breast tomosynthesis provides an image of the entire breast and combines multiple digital X-rays to deliver a clear 3D image, which is used to screen for breast cancer. Additionally, stereoscopic 3D mammography allows clinicians to find more cancerous lesions than standard mammography. A 4D flow MRI enables physicians to measure arterial blood flow and evaluate cardiovascular diseases based on pathological changes in blood flow.

The use of 3D and 4D ultrasound imaging has also gained momentum. 3D ultrasound imaging plays a crucial role in diagnosing a fibroid or polyp, a congenital abnormality, and placement of an IUD. Also, 3D imaging can be helpful during breast ultrasounds to visualize if the mass has extended into the ductile tissue, indicating an infiltration into the ductal system. In the emergency department, 4D ultrasound can help the physician determine the cause of sudden right upper quadrant pain. 4D images of babies and their real-time movements enable clinicians to determine anomalies in the fetus, including neurological problems, extremity abnormalities such as club foot, or congenital defects such as a cleft lip or palate.

Advances in 3D have been possible by computational power and a tremendous increase in networking speed, which allows the transmission of large data sets in 3D images. The integration of new software in mobile medical imaging devices has enabled multi-modality applications, which can manipulate computed tomography, MRI, PET, and other DICOM modalities and enable convenient and fast workflows and a reduction in hardware footprint. Advanced visualization has been exceedingly important for correlating modalities of CTs, MRIs, and PET bone scans to be as accurate, sensitive, and specific as possible for lymphatic and bone metastatic disease. Improvements in hardware performance, along with the increase in Internet speed have allowed several users to access advanced visualization tools even from remote locations. Thus, all these factors will propel the growth of the global mobile medical imaging services market.

8.2 RISE IN ADOPTION OF HANDHELD ULTRASOUND DEVICES

Exhibit 4 Impact of Rise in Adoption of Handheld Ultrasound Devices



The use of portable ultrasound devices has increased in recent years due to the high prevalence of several diseases such as cancer and rheumatic heart disease, and the demand for faster and more accurate diagnoses. Portable ultrasound devices are categorized under laptop-related, hand-carried, and hand-held devices. Portable ultrasound devices can be held within the palms of skilled examiners. The use of transportable ultrasound devices has increased during the last few years. The demand for these devices has flourished in the healthcare and medical imaging sectors. Ultrasound devices are portable, ideal for bedside use, and affordable. According to the European Society of Radiology, in an American study of cardiology practice, the use of mobile ultrasound devices enabled medical students to achieve correct diagnosis in 75% of cases. Thus, such studies have demonstrated the accuracy of portable imaging devices for correct diagnosis.

Many key players are manufacturing handheld ultrasound devices as they offer high efficiency. For instance, Fujifilm Sonosite iViz Ultrasound is a portable ultrasound device that is designed for high-quality ultrasound imaging. The device offers a combination of exceptional imaging performance, portability, and ergonomic one-handed operation. Similarly, Clarius Mobile Health, a healthcare technology company, offers Clarius HD3, a high-definition wireless ultrasound device that is powered by an easy-to-use application and AI technology to deliver high-quality images. The company also offers Clarius Clip-Ons, which are pocket ultrasound tri-scanners that can be used in conjunction with its existing line of Clarius C3 Scanners to scan various parts of the body. Samsung SonoAce R3 portable ultrasound machine is a versatile diagnostic tool with a compact design for high maneuverability. The intuitive device is easy to navigate and is ideal for applications across therapeutic areas such as obstetrics, cardiology, gynecology, urology, and pediatrics. Likewise, the Philips Lumify is an app-based ultrasound solution that is compatible with smart devices. The Philips Lumify mobile application enables a user to connect the Philips Lumify probe connector to a compatible smart device and operate the handheld ultrasound machine in a clinical environment. The available imaging modes for the device include 2D mode, M-mode, and Color Doppler mode.

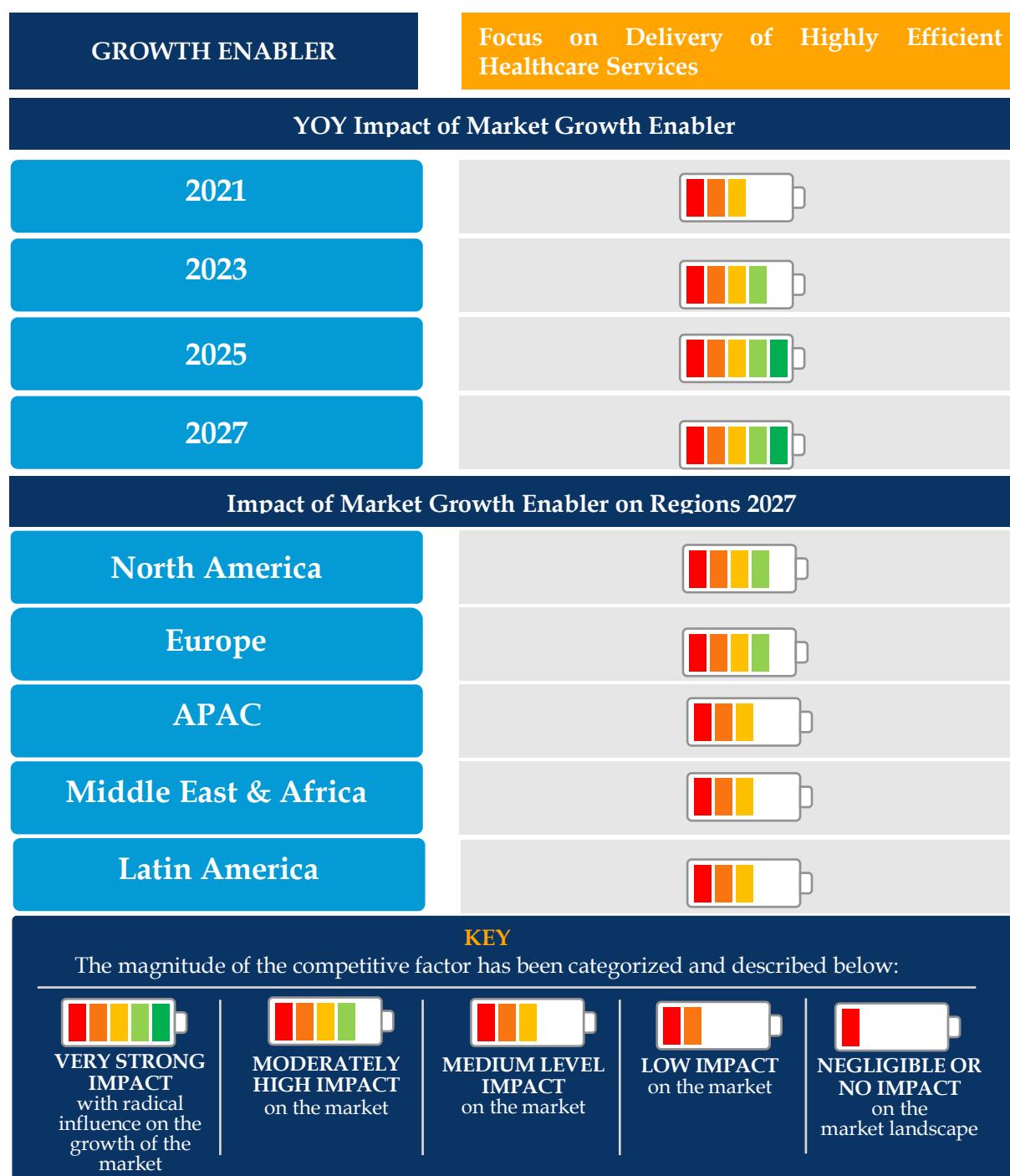
The use of hand-held ultrasound devices in point-of-care settings, especially in mobile healthcare settings, is increasing among end users who require portable imaging equipment in numerous medical specialties, including urology,

gastroenterology, and vascular therapy. The use of hand-held ultrasound devices for short tests and preliminary screening has benefitted the healthcare sector. The use of handheld ultrasound imaging devices has benefited the diagnosis of elderly individuals with limited mobility or difficulties in visiting doctors at hospitals, clinics, or imaging centers. Mobile hand-held ultrasound devices are personalized point-of-care solutions that enable healthcare professionals to minimize the overall time required to perform ultrasound examinations at the bedside. Also, portable ultrasound devices are convenient for use in various clinical specialties and situations, which include trauma medicine. Also, these devices can be used as guiding tools for various medical interventions and differential diagnoses of several conditions with minimal effort. Thus, such benefits will drive the demand for hand-held ultrasound devices across several regions worldwide.

9 MARKET GROWTH ENABLERS

9.1 FOCUS ON DELIVERY OF HIGHLY EFFICIENT HEALTHCARE SERVICES

Exhibit 5 Impact of Focus on Delivery of Highly Efficient Healthcare Services



According to the International Journal of Critical Illness and Trauma Science, complications associated with the transportation of critically ill patients include potential risks to the respiratory system, loss of venous access, traumatic injury, acid-base homeostasis, hemodynamic risks, including glucose control, possible infection, and even death. Therefore, most healthcare providers adopt mobile imaging solutions to enhance their workflow and deliver efficient patient care. The transportation of a critically ill patient to a radiology department can lead to complications. Eliminating the vehicle may also promote healing for the imaging patient and other patients in the area. For instance, Carestream, a global provider of X-ray imaging systems, has redesigned DRXRevolution, an advanced image processing solution that enhances the productivity of physicians or radiologists with quick image review or technique change options.

A portable x-ray system is quieter and does not interfere with patient care. The system can enter and exit the patient room, and the brakes required to deploy the system are barely audible. Through these improvements, it is possible to reduce the discomfort of patients visiting hospitals and others around them. Filming patients at the hospital bed prevents the spread of contagious diseases during patient transport. The external surfaces of portable systems are thoroughly cleaned and reused within minutes of cleaning, preventing the spread of forced airborne diseases. The surge in the number of mobile images is indicative of the prominent role of medical imaging services in rapid diagnosis.

Trauma patients with life-threatening injuries may be examined at the bedside rather than risking complications while transporting them from intensive care units to the site of diagnostic testing or procedure. Also, patients with non-life-threatening injuries, such as fractures, can be examined at the bedside. These features enable radiologists and physicians to perform the examination more efficiently and focus more on patient health and risk reduction and preventive strategies. Mobile imaging equipment is easy to move and install and can be parked next to the patient's bedside. Also, mobile imaging equipment can be easily disinfected in preparation for the next examination.

The effectiveness of mobile medical imaging solutions has outpaced demand due to the COVID-19 outbreak. Imaging devices serve as essential initial screening and classification tools to determine lung health before moving to advanced imaging

techniques. Medical imaging structures have to be integral for disease analysis due to several current trends and applications, such as the considerable surge in the elderly population and the increase in the prevalence of cardiovascular diseases, renal issues, apprehensive machine issues, and cancer. Mobile medical imaging systems are expected to witness impressive growth over the next few years, which will be driven by the focus on better care outcomes and lower waiting times to deliver timely care to patients. Mobile imaging technology overcomes the shortcomings of stationary imaging equipment, such as the initial capital investment associated with device installation, which is difficult to remove once the installation is complete. The reduction of patient wait times and ease of access are other important growth drivers for the global mobile imaging services market.

Mobile imaging service providers are witnessing a considerable surge in popularity due to the cost-effectiveness, simplicity, and efficiency of their products and services. The cost of repairing and replacing old or outdated imaging equipment in small and medium-sized hospitals has become unaffordable. The simplicity of portable medical imaging devices has addressed complications and delays between ultrasound examiners and physicians. For example, complications associated with the transportation of critical patients for diagnostics imaging or limitations of capital investment for new equipment have been eliminated over time with the introduction of mobile medical imaging solutions and services. Hospitals and physicians have also adopted innovative mobile imaging models due to their efficiency.

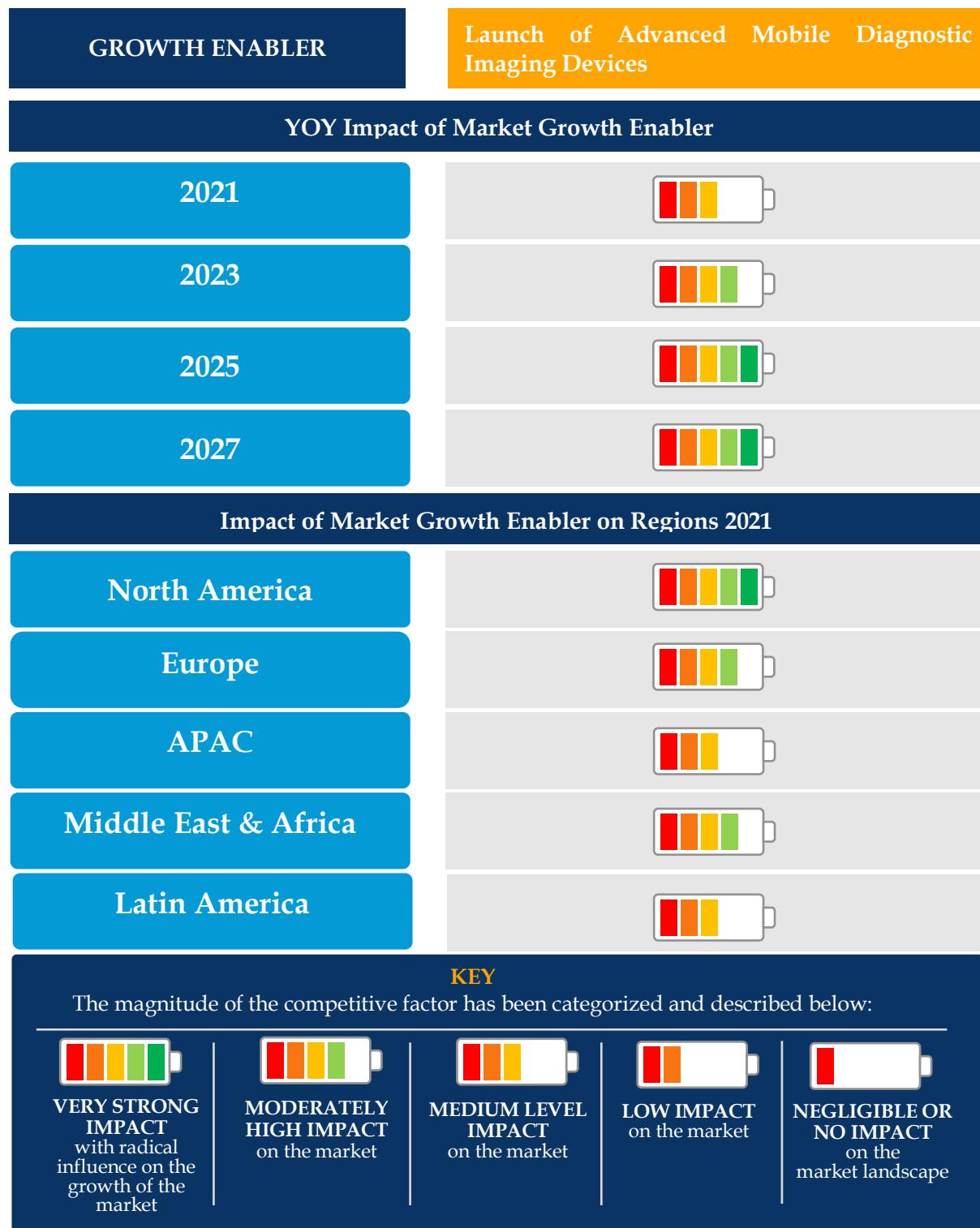
The use of portable computed tomography and MRI scanners has expanded over time in many countries due to improvements in social, economic, and technological factors. Portable computed tomography and magnetic resonance imaging scanners can be mounted on wheels or on a trailer to be moved within the hospital or from one location to another.

Advances in CT technology have improved the speed, slice count, and image quality of scanners. Such advances have enabled CT scanners to produce high-resolution images at a quicker pace, which enables clinicians to diagnose patients more accurately and perform high-precision medical procedures. The advent of mobile MRI has contributed to the success of mobile computed tomography. The high cost of conventional imaging equipment and long patient waiting lists have accelerated the demand for portable MRI and CT scanners. For example, purchasing a mobile

computed tomography and MRI device in Canada is beneficial from a patient's point of view as it can save travel costs and approximately \$118 per patient scan. The initial investment cost of stationary MRI and CT scanners is higher than that of their mobile counterparts. The US Food and Drug Administration has also confirmed the efficacy and safety of computed tomography and mobile MRI devices. Thus, all these factors will drive the demand for mobile medical imaging services and propel the market growth.

9.2 LAUNCH OF ADVANCED MOBILE DIAGNOSTIC IMAGING DEVICES

Exhibit 6 Impact of Launch of Advanced Mobile Diagnostic Imaging Devices



Medical imaging technologies are undergoing a continuous transformation and contributing to a surge in the launch of state-of-the-art medical imaging equipment. The high focus on the delivery of efficient healthcare services, better accessibility to healthcare, and faster reaction time combined with lower prices. Thus, many vendors launch updated versions and new variants of mobile diagnostic imaging devices at regular intervals.

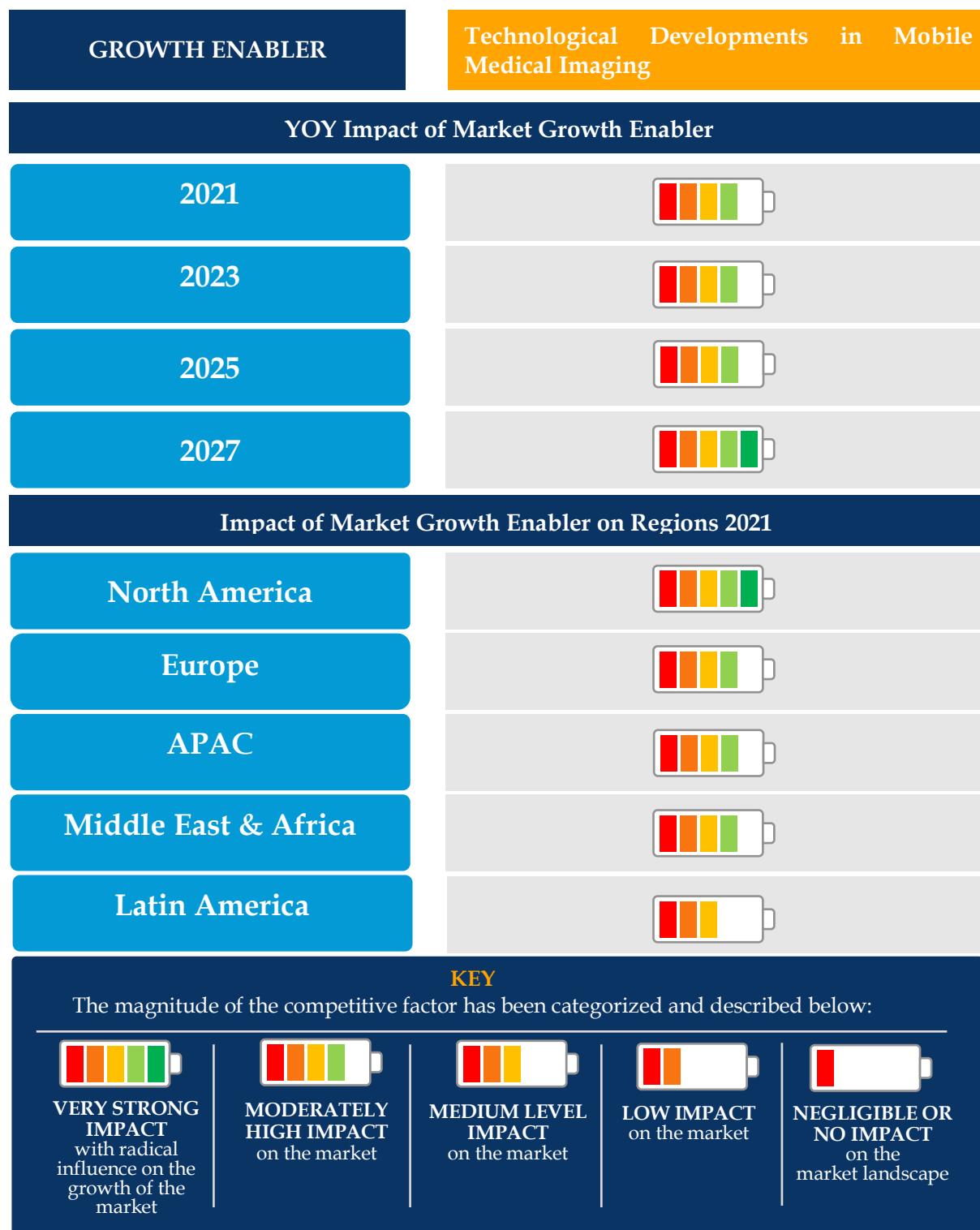
The latest and updated versions of imaging modalities, such as ultrasound, X-ray, MRI, CT, or PET, are used in emergency rooms as they allow instant examinations. Portable devices are equipped with advanced features which enable accurate, affordable, and convenient diagnosis of various conditions. The quality of portable and mobile diagnostic imaging units is drastically improving. Improved image resolution, lower weight, decreasing size, and better connectivity are some of the key areas where significant improvements have been observed.

On September 8, 2020, KA Imaging's portable dual-energy X-ray detector—Reveal—received 510(k) clearance from the US Food and Drug Administration (FDA). Reveal removes bones in an X-ray image to provide radiologists an unobstructed view of the lungs. The device enables bone and soft-tissue differentiation without motion artifacts in a single X-ray exposure. Mobile diagnostic imaging is preferred by most medical facilities to address the lack of space due to high patient volume and avoid remodeling a radiology facility room. Portable medical imaging devices are increasingly being used to diagnose and treat patients with mobility issues. The adoption of these devices has improved the pace and accuracy of various non-invasive diagnostic procedures and contributed to the delivery of immediate treatments.

Mobile medical imaging devices are easy to use anywhere in the hospital and clinics and outside the service centers or at patients' homes. Also, mobile imaging devices have greatly benefitted the healthcare sector by enabling radiological interventions for efficient diagnostic imaging and treatment of diseases. Thus, the availability of advanced mobile medical imaging devices and services will enable the growth of the market during the forecast period.

9.3 TECHNOLOGICAL DEVELOPMENTS IN MOBILE MEDICAL IMAGING

Exhibit 7 Impact of Technological Developments in Mobile Medical Imaging



The surge in the prevalence of chronic diseases and orthopedic injuries has improved the diagnostic imaging rates. The continuous demand for radiological interventions to detect various diseases and abnormalities has contributed to a considerable surge in technological advances in medical imaging devices, which has propelled the availability of advanced diagnostic imaging services. Several breakthrough innovations have reshaped the medical imaging field in recent years. Artificial and augmented intelligence and augmented and virtual reality combined with 3D imaging, combined with portable and wearable scanners have contributed to the development of innovative medical imaging technologies that improve patient outcomes across different therapeutic areas. Thus, numerous applications of medical imaging systems in gynecology, cardiology, and neurology are expected to promote the adoption of mobile imaging services and drive market growth.

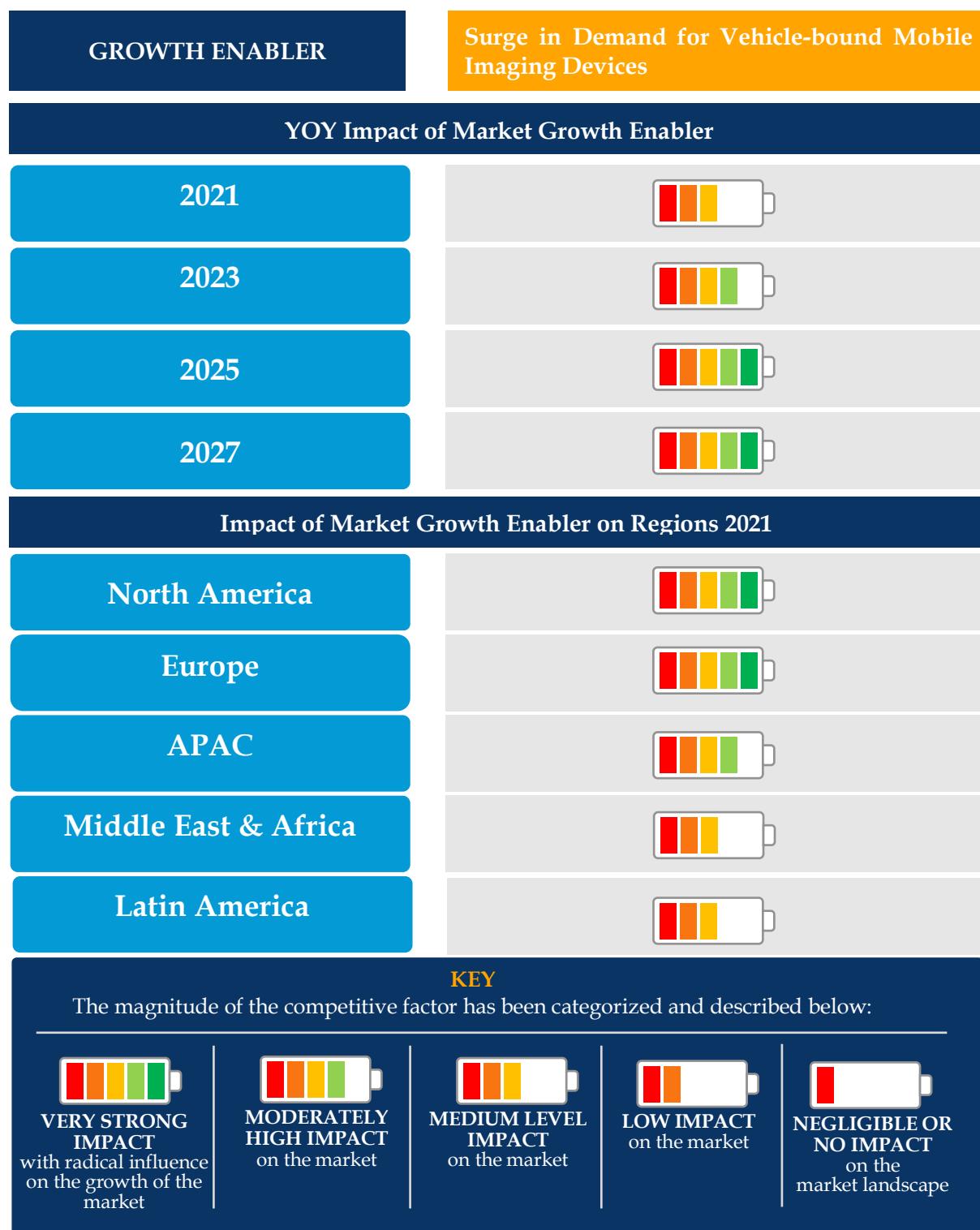
Imaging workflow involves the seamless integration of data at the patient level, scheduling, billing, imaging data acquisition, storage, and transfer of diagnostic images to a physician for optimal productivity. Well-developed connections between systems at each level of imaging workflow, facilitated by the Internet, form the backbone of radiology and are usually manifested by a robust system-wide infrastructure. The evolution of digital radiography (DR) or X-ray has moved the modality into the mobile space. DR is one of the most commonly used modalities globally, with applications across emergency departments, orthopedic clinics, and physicians' offices. With a combination of digital X-ray capabilities and a mobile cart-based system, providers can conduct imaging examinations anywhere, even at the patient's bedside. Such advances have enabled quicker test turnaround times and faster diagnoses for different conditions.

In September 2019, GE Healthcare received US Food and Drug Administration (FDA) clearance for a new artificial intelligence (AI) algorithm collection on the Optima XR240amx mobile DR system. Chest X-rays are the most common radiographic procedure and account for approximately 45% of the total diagnostic test volume. In 2019, Israel-based Zebra Medical Vision released HealthPNX, an AI solution to detect pneumothorax in chest X-rays. In the same year, the digital radiography solution received FDA 510(k) clearance to address two acute conditions, namely intracranial hemorrhages and pneumothorax. According to Zebra Medical, the solution can save physicians more than 80% of their time to diagnose acute conditions. Similarly,

Fujifilm's FDR Go PLUS is an agile full-size portable X-ray DR System that improves the workflow and offers advanced image processing capabilities. The FDR Go Plus features a retractable column at one of the lowest park positions on a full-size portable device for easy visibility while traveling. The low profile helps safely navigate tight confined spaces such as the emergency room (ER), trauma unit, operating room (OR), and neonatal intensive care unit. Such technological advances in portable and mobile imaging devices are expected to promote the growth of the global mobile medical imaging services market. For instance, currently, nuclear imaging is being used to detect amyloid plaques that collect in the brains of Alzheimer's patients. These are positively identified during an autopsy, and therefore, this technology could indicate Alzheimer's patients at risk before the disease reaches the last stage. The ability to detect these plaques is expected to lead to a considerable surge in treatment options during the early stages of the disease. Equipment used with radiotracers can detect abnormalities in the thyroid gland, bladder, or heart, among other body parts, and can detect cancer or confirm an existing diagnosis.

9.4 SURGE IN DEMAND FOR VEHICLE-BOUND MOBILE IMAGING DEVICES

Exhibit 8 Impact of Surge in Demand for Vehicle-bound Mobile Imaging Devices



The rise in demand for vehicle-bound mobile imaging devices due to several advantages compared to conventional fixed imaging equipment will emerge as a key growth driver for the global mobile medical imaging services market during the forecast period. The surge in the availability of advanced mobile-based MRI options in the healthcare sector will provide a low-cost alternative for implementing cutting-edge technology, which will drive the growth of the market. The surge in the adoption of medical imaging systems is attributable to their applications in neurology, cardiology, and gynecology. Also, the rise in the burden on service providers that are dependent on their fixed imaging modalities will fuel the demand for mobile medical imaging systems. With the rise in the prevalence of screening procedures, smaller hospitals and private clinics will find it difficult to afford expensive imaging equipment. Thus, most service providers consider mobile medical imaging devices to be a reasonable option.

The adoption of mobile imaging modalities will enable healthcare establishments to overcome the demerit of fixed imaging equipment, such as the capital investment involved in the installation of equipment, which cannot be removed once installed. The rise in the demand for mobile imaging systems is attributable to benefits such as the decline in waiting times and easy accessibility to diagnostic imaging services. Mobile imaging services involve constant interaction between various healthcare units and relocation of these units based on the fixed schedule or patient load in each facility. Therefore, most healthcare facilities can benefit from the improved patient care and revenue associated with the unit.

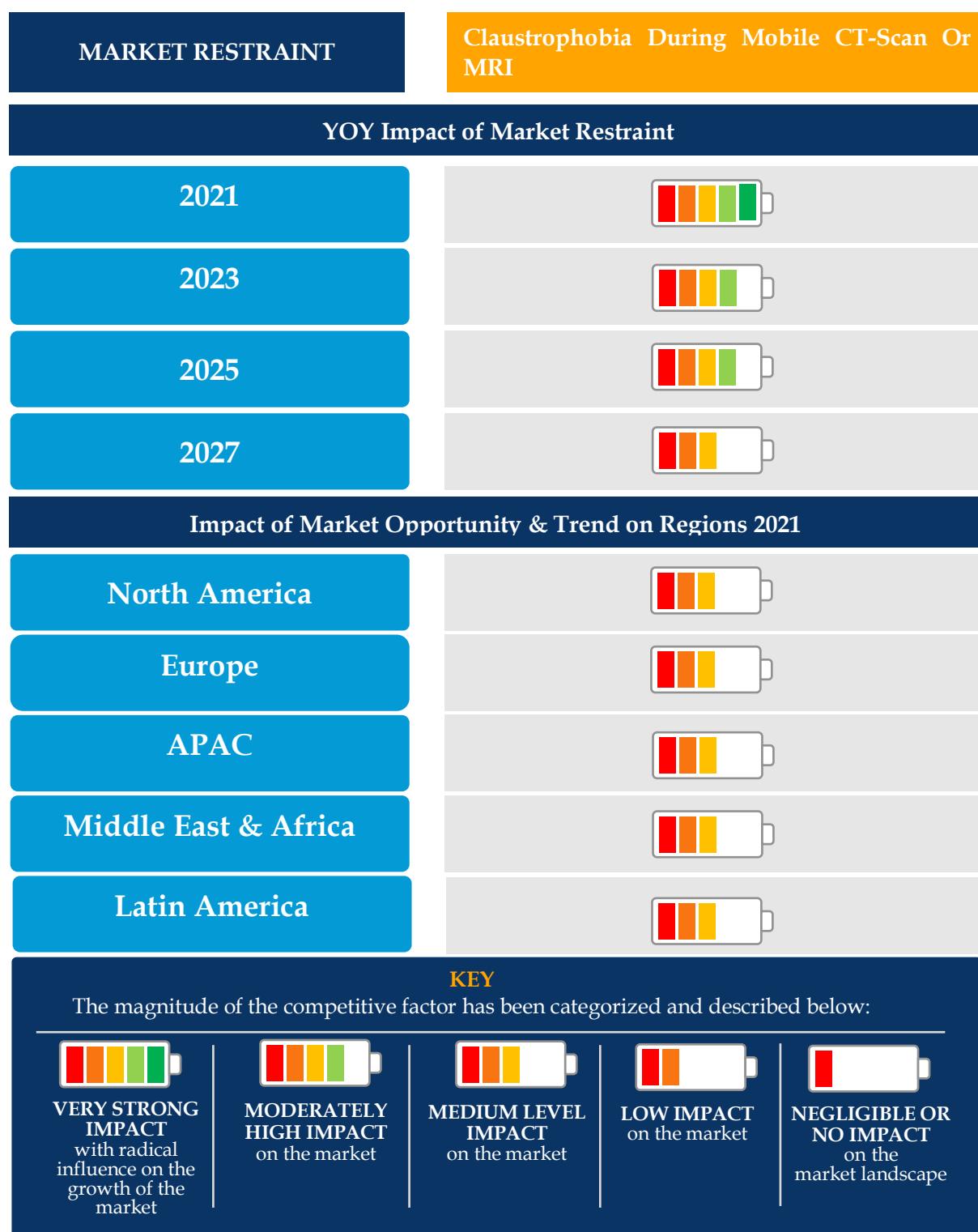
The mobile medical imaging units offer multiple benefits, and therefore, are ideal to maintain an efficient radiological workflow in different types of healthcare institutions. These units have a separate entrance for patients and radiologists to avoid cross-infection. Also, there are many imaging-equipped devices installed inside the units. 5G network supports quick file transfer for remote diagnosis through the console inside the units. The units have a width of up to 3.5 meters and can be set for various imaging purposes. Additionally, these units have a spacious layout design to deliver pleasant mobile scanning and operation experience to patients and radiologists along with an extra extended room. Automated positioning algorithms enable a more efficient and safer scan. Auto hydraulic leveling systems allow the stable and smooth operation of CT units. An imaging system fitted in a

vehicle includes a first imaging sensor, a second imaging sensor, and a housing unit coupled to the first imaging sensor and the second imaging sensor, the housing configured to be connected to a vehicle without permanently modifying the vehicle. The imaging system units in the vehicle are well equipped to cater to the diagnostic imaging requirements of patients at several facilities. These advanced features will fuel the demand for vehicle-bound mobile imaging units and propel the growth of the global mobile medical services market during the forecast period.

10 MARKET RESTRAINTS

10.1 CLAUSTROPHOBIA DURING MOBILE CT-SCAN OR MRI

Exhibit 9 Impact of Claustrophobia During Mobile CT-Scan Or MRI



MRIs, CT scans, PET scans, and bone scans require a body to be enclosed or semi-enclosed in a specific machine to capture clear images of the area of interest. For some individuals with claustrophobia, this can incite high fear, anxiety, and panic. Therefore, many patients refrain from going for diagnostic imaging tests, which may ultimately result in a decline in imaging tests. The drop in diagnostic medical imaging tests may prove to be a major loss for service providers, which may hamper the market growth. The loudness and duration of time in the machine and feelings of suffocation and fear of being injured are key deterrents to the adoption of medical imaging tests among patients. The adoption of diagnostic imaging can be low in cases where a patient gets violent or has undergone some trauma or accident.

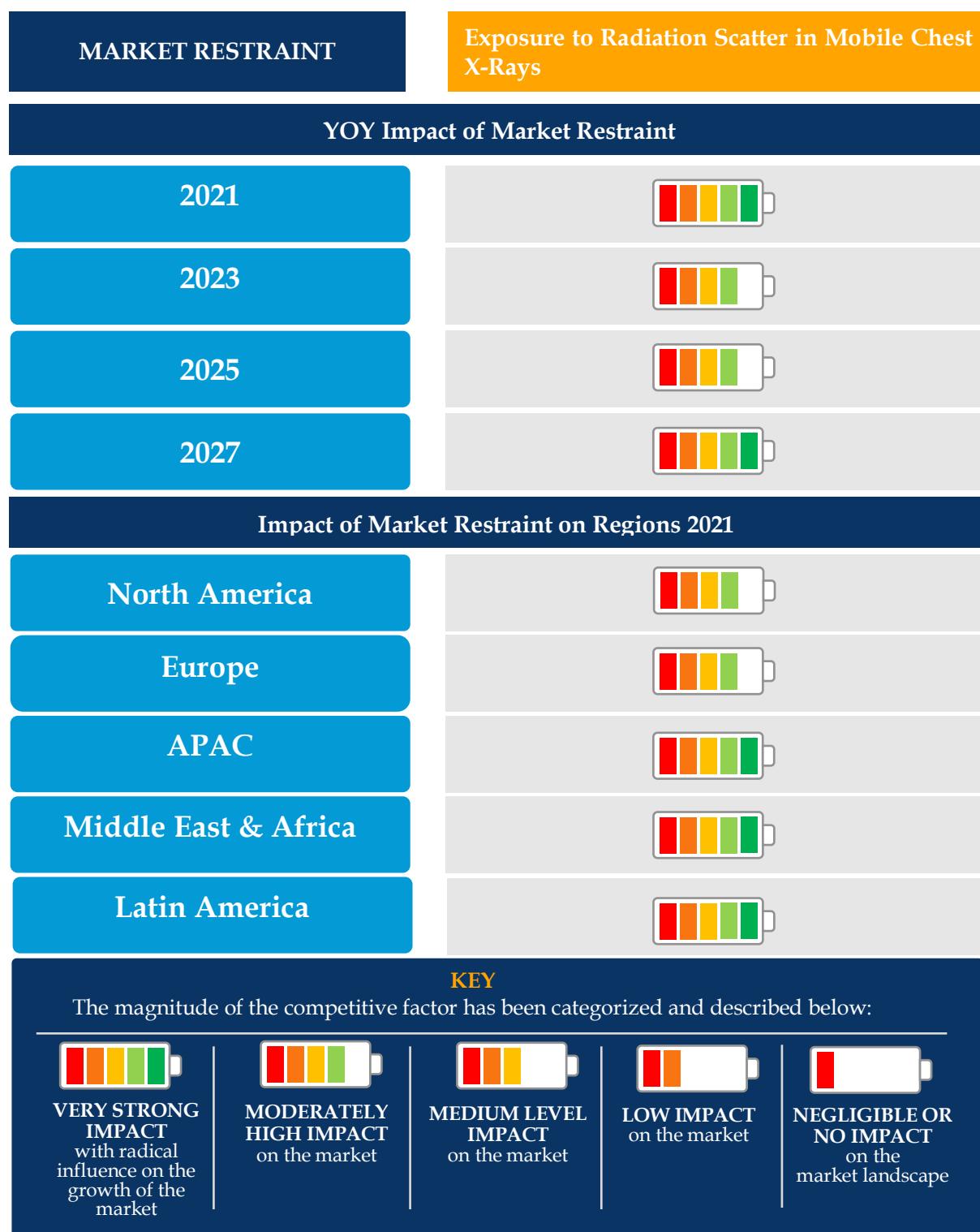
Patients may experience anxiety during the screening process, resulting in them moving more during the actual medical test, which can impact the image quality of the scan. Also, restless patients may have to undergo the procedure multiple times or stay in the machine for a longer duration, which may heighten their anxiety even further.

Some facilities offer open MRIs, which have no sides and are quieter and simpler than conventional closed MRIs. Also, open MRIs are equipped with a weight-bearing feature, which enables technologists to tilt them and scan patients in a standing position. Research indicates that open MRI systems are particularly beneficial for individuals with claustrophobia as they prevent the side effects caused by drugs administered to control claustrophobia, anxiety, or restlessness in closed MRIs. Some facilities may provide music, earplugs, and special headphones to help reduce the machine's sound and create a more peaceful environment. Also, some facilities may set up a relaxing and pleasant environment within the testing room.

Claustrophobia is a challenge for performing MRI and has been investigated in several large non-randomized studies. According to the Radiological Society of North America, it was found that 1%-15% of all MRI examinations in unselected patients on conventional scanners cannot be completed due to claustrophobia or the need for conscious sedation. Anxiety about possible outcomes, not knowing what to expect, and the loud noises of the MRI machine can increase the distress of patients. An estimated 7%-10% of the global population is affected by claustrophobia. Thus, the surge in the incidence of claustrophobia during mobile CT-Scan or MRIs may impede the market growth during the forecast period.

10.2 EXPOSURE TO RADIATION SCATTER IN MOBILE CHEST X-RAYS

Exhibit 10 Impact of Exposure to Radiation Scatter in Mobile Chest X-Rays



Source: Arizton

Scattered radiation or radiation scattering refers to a reduction in the level of contrast of a hidden X-ray image due to the introduction of additional quantum noise, which results in a considerable decline in image sharpness and an increase in background heterogeneity. The phenomenon often occurs when imaging thicker areas of the body (such as the chest), especially when the collimation distance is not close enough, which can result in image quality degradation. When X-rays penetrate the chest, part of the photons will participate in the Compton interaction and cause radiation to scatter, which affects the image quality by introducing a low-frequency background signal full of noise that produces turbidity. Thus, radiation scattering reduces the contrast and details of the image and results in blurring, infiltration, and other pathologies of the vascular system. The traditional solution to reduce scattering is to use anti-scatter grids. The grid design includes lead parallel bars and bars made of radiolucent material. The technician places the grid between the detector and the patient.

The light beam with a path parallel to the ray-transparent strip, can pass freely. Since the lead strip attenuates the X-ray beam, the grid usually requires a higher radiation exposure dose. Also, the grid is heavy and bulky, which can lead to misalignment during positioning and can reduce the efficiency of the grid. Also, the inconvenience of handling discourages several radiologists from using the grid altogether in some situations. Thus, the issue of radiation scattering in mobile chest X-Rays is expected to slightly hamper the market growth due to low imaging quality.

However, many manufacturers have tried to leverage technological advances to overcome the radiation scattering issue in their mobile medical imaging devices. For example, Carestream has introduced SmartGrid, a software that reduces the harmful effects of scattered radiation in images. Also, the software helps improve image contrast when no physical anti-scattering grid is used. The software uses advanced algorithms to estimate and reduce low-frequency radiation scattering distributed throughout the image. Many physical factors affect the properties of scattering, such as the energy spectrum of the beam, the thickness and size of the object, and the collimation. However, by using empirical modeling and estimating algorithm parameters, the SmartGrid software can address these factors. SmartGrid is used with Carestream's flagship DRX-Revolution Mobile X-ray System and scaled-down affordable DRX-Revolution Nano. SmartGrid used with mobile systems from other

manufacturers can be upgraded to digital with Carestream's DRX Retrofit Kits. It is a highly effective solution for issues associated with compromised image quality in mobile chest X-exams.



MARKET LANDSCAPE

11 MARKET LANDSCAPE

11.1 MARKET OVERVIEW

The increasing application of medical imaging systems in cardiology, women's health, and neurology is driving the market for mobile medical imaging systems. Other market drivers are population growth, advertising, and improved healthcare infrastructure. There is a high demand for mobile medical imaging systems, and it is growing, service providers move their facilities in the desired direction. Heart disease is the most common disease in the world. These include coronary artery disease, congenital heart disease, electrophysiology, valvular heart disease, and heart failure. These diseases require immediate treatment. Mobile imaging services play a very important role as PET/CT, MRI, and ICU scanners are well equipped. The patient base is growing with the increasing incidence of chronic diseases such as cardiovascular disease, cancer, endocrine and gastrointestinal disorders, and neurological and neurological diseases. Lung diseases are driving the growth of the mobile imaging market. The rising use of imaging technology to detect and monitor disease progression is one of the factors supporting the market growth. The surge in the adoption of mobile imaging services in hospitals over various periods to lessen waiting times has reduced the financial burden on hospitals and provides better patient care.

The availability of mobile diagnostic imaging tools for specific applications has contributed to better imaging results and market growth. There has been a considerable surge in the number of mobile service providers that have introduced installation options that allow end users to purchase scanners that are easy to use and inexpensive. Factors such as several benefits over stationary imaging equipment, the rise in demand for mobile imaging vehicles outfitted with radiology equipment are expected to witness profitable growth in the mobile imaging services market during the forecast period. The emergence of advanced mobile MRI devices in the medical field, which provides a cheaper alternative to the introduction of advanced technologies, is expected to fuel the growth of the market. The global elderly population will grow by almost 60% over the next 15 years. The rising number of individuals aged above 65 is projected to exceed 1 billion by 2030. The elderly population is expected to make up 12% of the global population. Also, by 2050, this

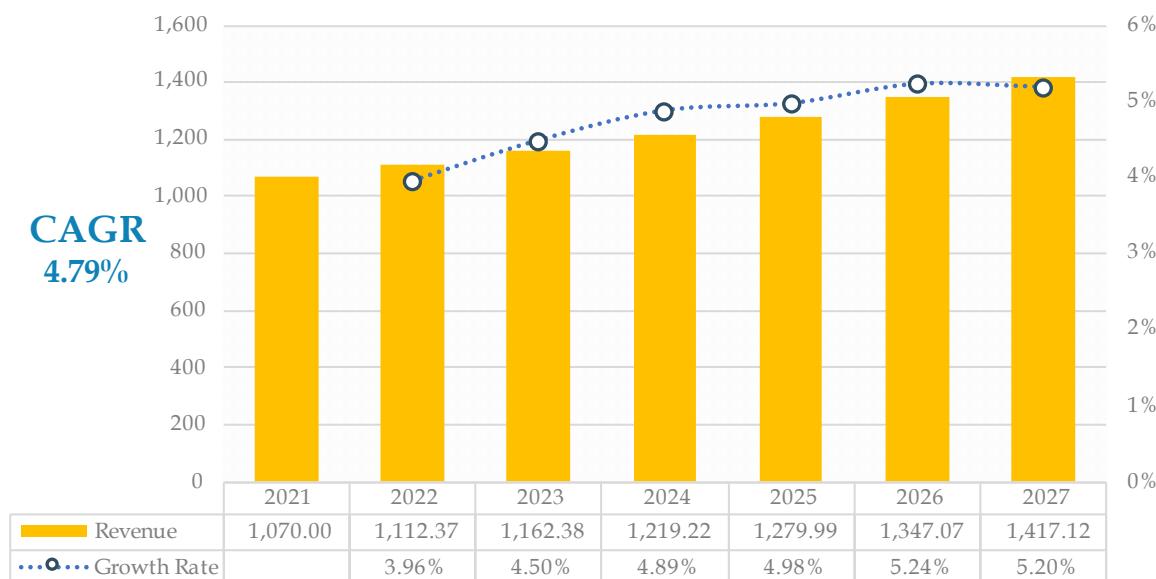
number is projected to exceed 1.6 billion, accounting for 16.7% of the total population. According to World Health Organization (WHO), human life expectancy has increased over the years. The global population of individuals aged above 60 is expected to reach 2 billion by 2050. In 2018, there were 125 million people aged above 80. By 2050, almost 80% of the total elderly population will be in low- and middle-income countries.

Aging is usually associated with an increased risk of chronic diseases and weak bones and muscles. Elderly people are at risk of developing various diseases, such as orthopedic disorders, lung problems, and abdominal problems. Due to the rapid surge in the aging population, the prevalence of geriatric diseases has increased, and the market has expanded accordingly. The ongoing COVID-19 pandemic is expected to spur the growth of the global mobile imaging services market. For example, in April 2020, Carestream Health announced that it had increased the production of its portable diagnostic imaging systems, including the DRXRevolution Mobile Xray System and the DRXRevolution Nano Mobile Xray System, in response to the novel COVID-19 pandemic.

Additionally, the increasing prevalence of cardiovascular diseases is expected to drive market growth. For example, according to the 2019 American Heart Association Heart and Stroke Statistics Update, approximately 48% of American adults had some form of cardiovascular disease in 2016. Mobile imaging devices require frequent maintenance, which is expected to slightly impede the growth of the global mobile imaging services market. Trailers, vehicles, and vans equipped with mobile radiology equipment may have high maintenance requirements due to the high load on the unit caused by vibration, torque, shock, and lateral and vertical movements. Also, the need to change the modality configuration will contribute to the low flexibility of mobile imaging devices between different objects, which is expected to impede market growth. Integrated RIS/PACS integration requires each mobile scanner to be reconfigured to work in a separate hospital, which makes the scanning process complex, time-consuming, and impractical for daily operations.

11.2 MARKET SIZE & FORECAST

Exhibit 11 Global Mobile Medical Imaging Services Market 2021–2027 (\$ million)

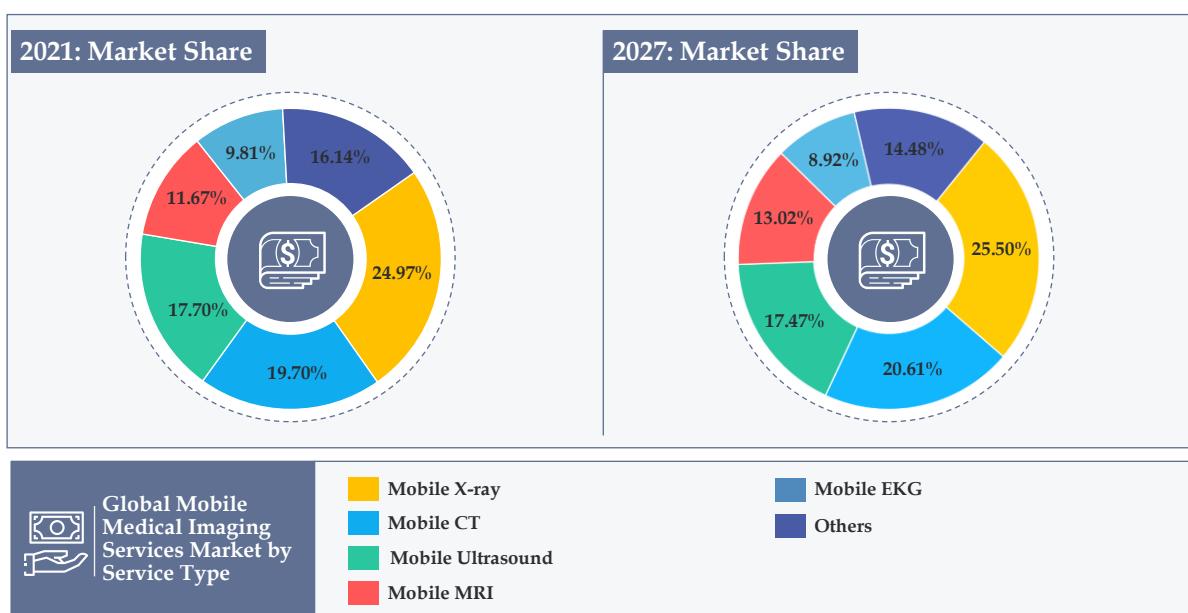


Source: Arizton

In 2021, the global mobile medical imaging services market was valued at \$1,070.00 million, which is expected to grow at a CAGR of 4.79% to reach \$1,417.12 million by 2027.

11.2.1 Market Insights By Service Type

Exhibit 12 Global Mobile Medical Imaging Services Market By Service Type

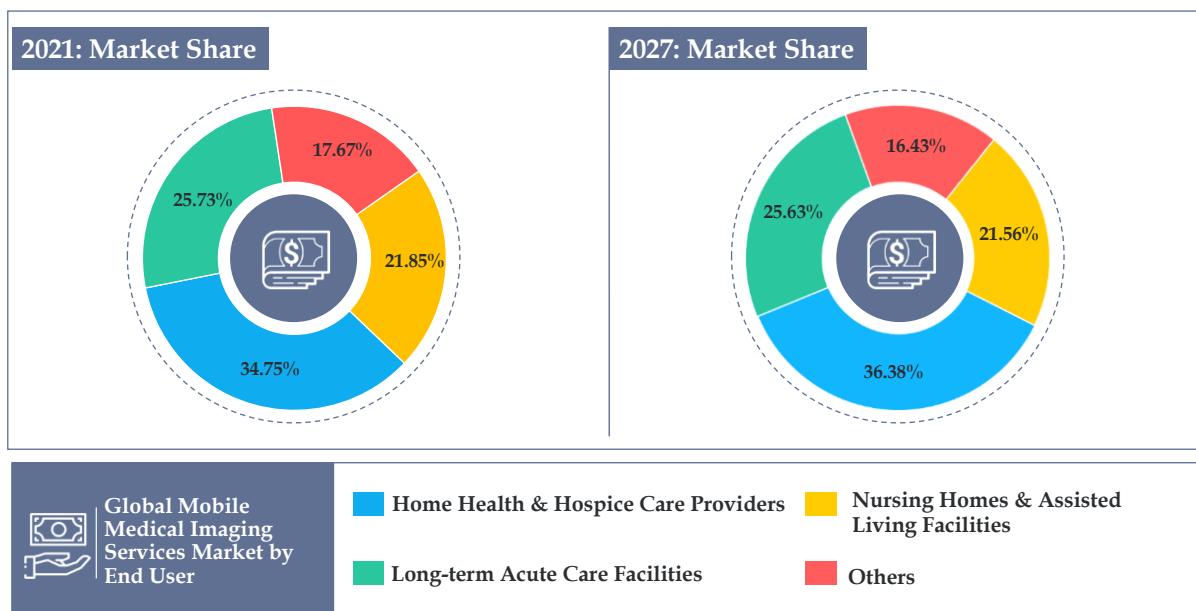


Source: Arizton

Based on service type, the global mobile medical imaging services market is segmented into mobile X-ray, mobile ultrasound, mobile CT, mobile MRI, mobile EKG, and others. In 2021, the mobile X-ray segment accounted for a revenue share of 24.97%, followed by the mobile CT segment with 19.70%.

11.2.2 Market Insights by End User

Exhibit 13 Global Mobile Medical Imaging Services Market By End User



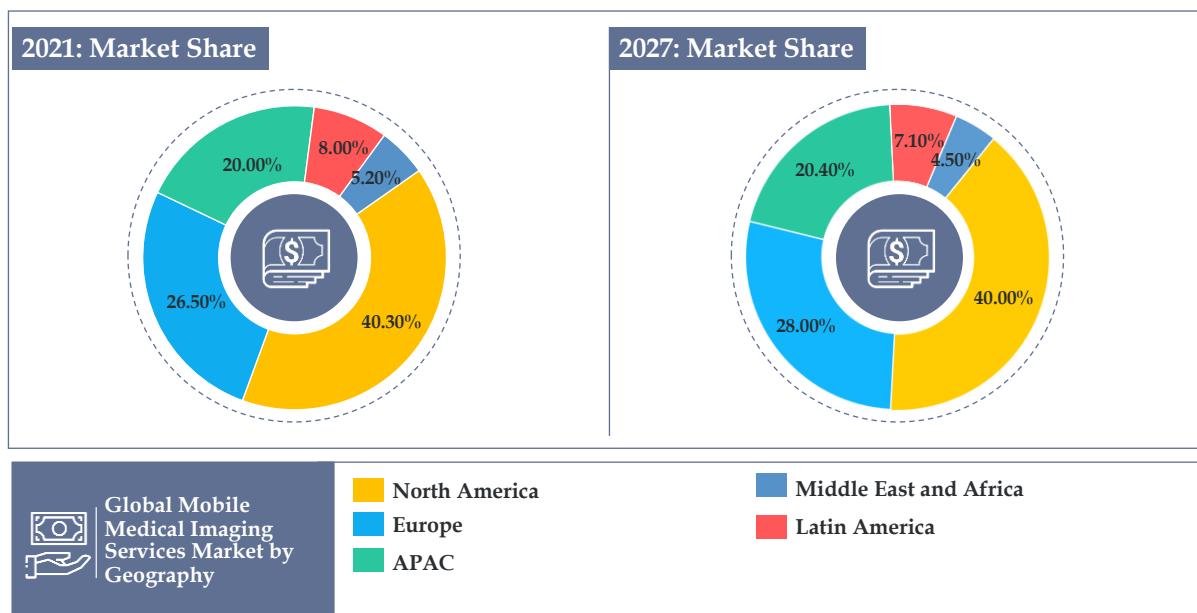
Source: Arizton

Based on end user, the market is bifurcated into the nursing homes & assisted living facilities, long-term acute care facilities, home health & hospice care providers, and others segments. In 2021, the home health & hospice care providers segment accounted for a revenue share of 34.75%, followed by the long-term acute care facilities and nursing homes & assisted living facilities segments with 25.73% and 21.85%, respectively.

11.2.3 Market Insights By Geography

Based on geography, the market is segmented into North America, Europe, APAC, Latin America, and the Middle East & Africa. In 2021, North America dominated the market and accounted for a revenue share of 40.30%, followed by Europe, APAC, Latin America, and the Middle East & Africa with 26.50%, 20.00%, 8.00%, and 5.20%, respectively.

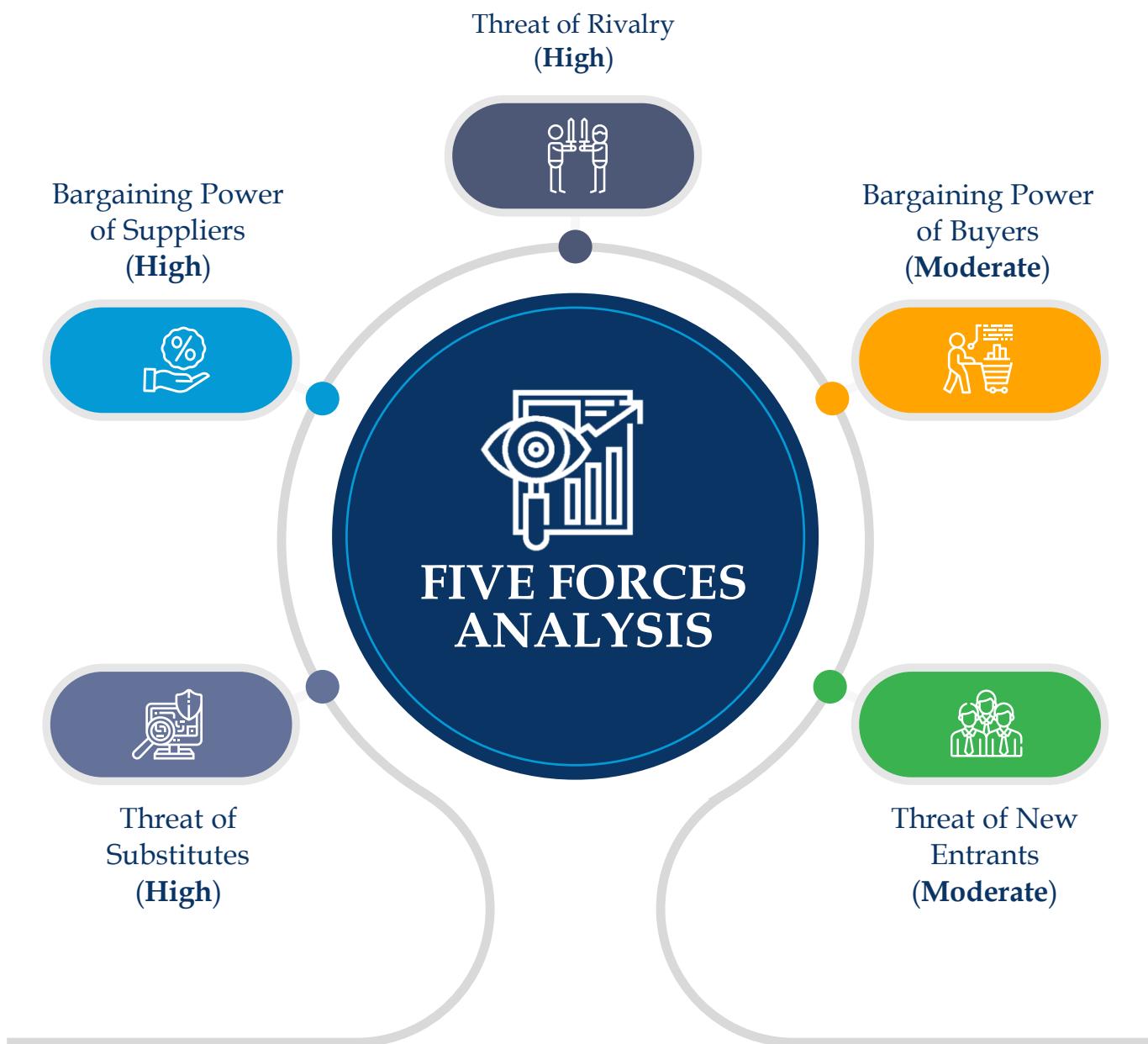
Exhibit 14 Global Mobile Medical Imaging Services Market By Geography



Source: Arizton

11.3 FIVE FORCES ANALYSIS

Exhibit 15 Five Forces Analysis 2021



Source: Arizton

11.3.1 Threat Of New Entrants

The global mobile medical imaging services market is vast and offers significant opportunities to new players that offer mobile medical imaging services with improved safety features. The existing players have dominant shares and superior product development and marketing expertise, and therefore, new entrants are likely to find it difficult to establish their presence in the market. However, with the surge in the acceptance and scope of mobile medical imaging services, especially in rural and semi-urban areas of many LMICs, many new vendors are trying to enter this high-growth market. Thus, the threat of new entrants is moderate and will remain the same during the forecast period.

11.3.2 Bargaining Power Of Suppliers

Mobile medical imaging service providers procure medical imaging equipment from OEMs. The market has a few OEMs that supply a comprehensive range of medical imaging equipment such as X-ray, ultrasound, MRI, CT scanners, and PET/SPECT. Service providers have limited choices in terms of critical medical imaging equipment such as CT scanners, MRI, and PET/SPECT. GE Healthcare, Philips Healthcare, and Siemens Healthineers are the top three suppliers with a broad geographic presence and an efficient distribution network. Also, the presence of a limited number of suppliers will compel service providers to bargain with the imaging equipment suppliers. Therefore, the bargaining power of suppliers is expected to be high during the forecast period.

11.3.3 Bargaining Power Of Buyers

The general public and patients worldwide have several options to choose from a broad range of global, regional, and local mobile medical imaging service providers. Factors such as the expansion of the elderly population and the surge in demand for mobile healthcare services have encouraged several service providers to enter this market and offer their services in rural and semi-urban areas where healthcare services are limited. However, as most mobile medical imaging services are sought during emergencies and urgent cases, people do not have much bargaining power in such situations. Therefore, the bargaining power of buyers is moderate and will remain the same during the forecast period.

11.3.4 Threat Of Substitutes

Mobile medical imaging services are ideal alternatives to conventional in-office medical imaging services. Although the adoption of mobile medical imaging services has increased over the years, most individuals prefer different healthcare settings to undergo a wide array of diagnostic medical imaging procedures. The presence of several mobile medical imaging alternatives has heightened the threat of substitutes. The presence of many standalone diagnostic centers and hospitals makes it easy for people to undergo medical imaging procedures. Therefore, the threat of substitutes is high and will remain the same during the forecast period.

11.3.5 Competitive Rivalry

The global mobile medical imaging services market is highly competitive due to the presence of several global, regional, and local service providers. Consequently, many service providers are implementing various strategies to remain competitive and expand their presence across geographies to gain a higher market share. Thus, the threat of rivalry in the market is high and will remain the same during the forecast period.



SERVICE TYPE SEGMENTATION

12 SERVICE TYPE

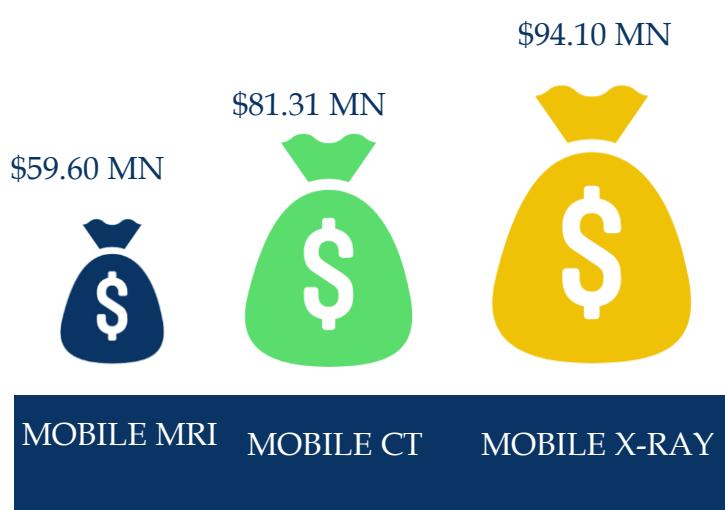
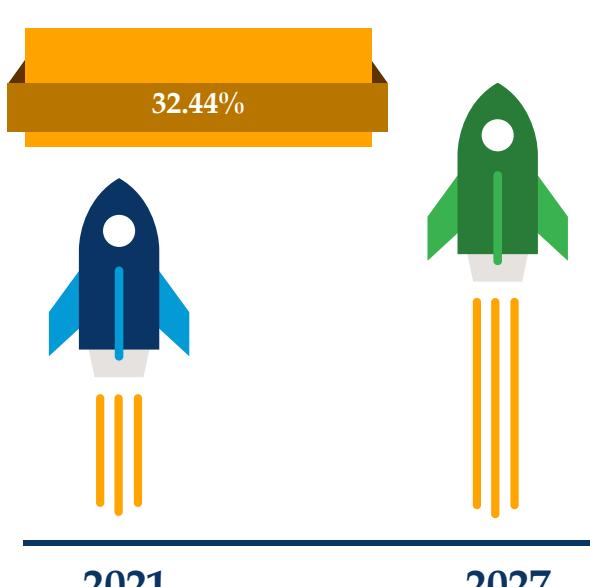
12.1 MARKET SNAPSHOT & GROWTH ENGINE

Exhibit 16 Incremental Growth By Service Type 2021 & 2027

SERVICE TYPE	2021	2027	CAGR
MOBILE X-RAY	\$267.22 MN	\$361.32 MN	5.16%
MOBILE CT	\$210.80 MN	\$292.10 MN	5.59%
MOBILE ULTRASOUND	\$189.38 MN	\$247.55 MN	4.57%
MOBILE MRI	\$124.92 MN	\$184.52 MN	6.72%
MOBILE EKG	\$104.94 MN	\$126.38 MN	3.15%
OTHERS	\$172.75 MN	\$205.25 MN	2.91%

ABSOLUTE GROWTH

INCREMENTAL GROWTH TOP 3 CONTRIBUTORS



12.2 MARKET OVERVIEW

Exhibit 17 Global Mobile Medical Imaging Services Market By Service Type

Global Mobile Medical Imaging Services Market by Service Type

Mobile X-ray

Mobile CT

Mobile Ultrasound

Mobile MRI

Mobile EKG

Others

Source: Arizton

Based on service type, the global medical mobile imaging services market is bifurcated into mobile X-ray, mobile CT, mobile ultrasound, mobile MRI, mobile EKG, and many others. Portable X-ray systems are often used to perform a chest X-ray on patients who have mobility impairments, and therefore, cannot be admitted to the radiology department. Mobile X-ray machines are designed for easy mobility in limited spaces between hospital beds in small wards for high-quality imaging and enhanced patient safety. Also, mobile X-ray equipment is used to offer imaging services to hospitalized critically-ill patients who cannot be transported to the radiology department. Mobile X-ray examinations are mostly performed outside the hospital premises. Mobile X-ray solutions are also used for hospice patients who require palliative care and individuals with intellectual disabilities due to benefits such as better workflow efficiency, patient acceptability, and low infection transmission risk due to the low frequency of interactions.

A CT scanner amalgamates a series of X-ray images from different angles around the body. It uses a computer to cross-sectional images of bones, blood vessels, and soft tissues. The CT scanner computer creates a 2D image of the body slice being processed. A standard X-ray machine is usually 0.04 to 0.4 inches thick and combines 2D images to create a 3D image of the body, and provides fairly high-quality diagnostic images within a short timeframe. Hospital mobile scanners can reduce patient backlog while generating income and providing quality care. There are minimal differences in image quality between fixed and mobile medical imaging systems. Mobile scanners require higher operating costs to maintain image quality.

Also, mobile imaging systems allow patients to travel less to receive scans, especially in rural areas. The main reason for the increase in mobile CT is the low initial investment.

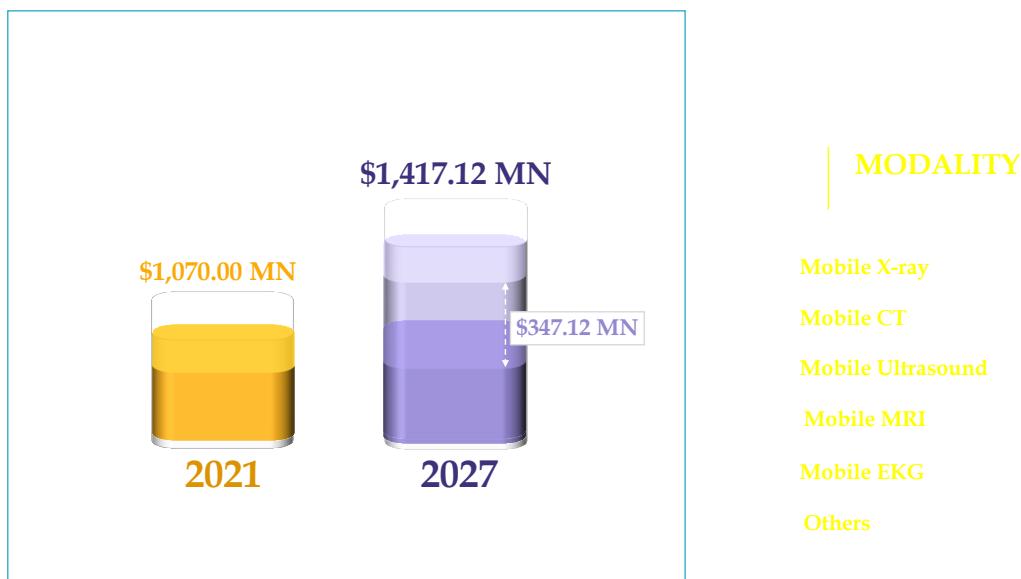
The mobile ECG monitors have built-in sensors that record electrical activities in the heart. The patient's finger is held against the sensor or the patient wears a device on their wrist or any other body part. Some devices have a built-in screen that allows the user to view the rhythm of their heart. Doctors may use ECG to diagnose coronary artery disease. Physicians use these devices to check heart rhythms and poor blood flow to the heart muscle, diagnose a heart attack, and check for abnormalities such as thickened heart muscles. The miniature wireless ECG sensor can measure human body ECG signals and monitor the health status of patients. It transmits the processed ECG data to the mobile phone via Bluetooth data technology to acquire the ECG waveform, display the heart rate, and store the ECG data.

Mobile ultrasound machines are particularly useful in settings with limited space or situations that make the mobility of diagnostic imaging solutions a critical factor. Although there is a well-established market for portable ultrasonic devices in developed countries such as the US, the demand for mobile ultrasonic devices has witnessed a considerable surge over the years. The segment is anticipated to witness rapid growth during the forecast period due to its effectiveness in providing mobile assistance. With the surge in demand for mobile medicine and advances in ultrasound diagnostics, several small players have plans to foray into the market and gain a greater revenue share. Mobile ultrasound is used for rapid diagnostics as it enhances radiological workflow. Mobile diagnostic imaging equipment is used across several therapeutic areas, such as cardiology, angiology, radiology, endocrinology, pediatrics, obstetrics, and gynecology. Emergency and critical healthcare services have adopted ultrasound early to improve the speed and accuracy of their patient care services.

Mobile MRI devices enable the delivery of convenient and flexible services, reduce fixed costs, and provide potential revenue sources, and therefore, have a high demand. The mobile MRI units can provide diagnostic imaging services to patients in rural areas with no access to advanced healthcare services. Mobile imaging devices serve patients in a faster and more efficient way. The technologies used to power

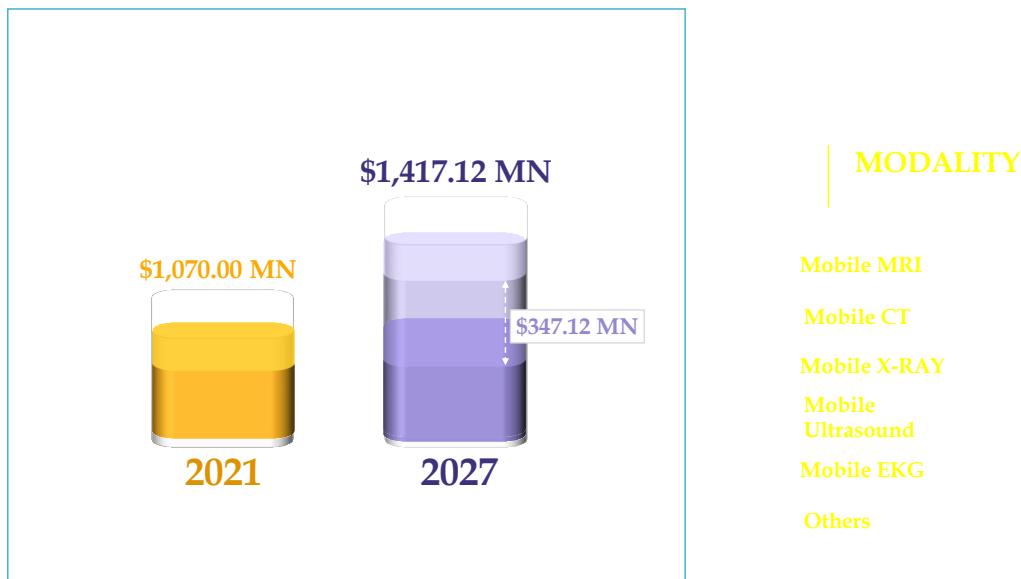
advanced mobile MRI equipment are constantly evolving, which has accelerated the interest in new ways of using them.

Exhibit 18 Global Mobile Medical Imaging Services Market By Service Type: Incremental Growth



Source: Arizton

Exhibit 19 Global Mobile Medical Imaging Services Market By Service Type: Absolute Growth



Source: Arizton

12.3 MOBILE X-RAY

12.3.1 Market Overview

Portable or mobile X-ray devices are considered mobile devices because they are equipped with wheels to enable their movement to different locations within hospital premises or health care units. These devices are powered by a battery-powered electric motor, which facilitates movement when the radiographer drives the mobile device with less force. Mobile X-ray systems are often used for chest X-ray examinations of critically ill patients who cannot be transferred to the radiology department. Therefore, the design of mobile X-ray equipment has such unique characteristics that it can be moved in a limited space, such as between beds in a small ward.

Mobile X-ray examinations are used outside the hospital. Mobile X-rays are used for several patient populations, including hospice patients for palliative care, people with intellectual disabilities, or psychiatric patients. Mobile X-rays can be used outside the hospital and have potential benefits for both patients and healthcare staff. The mobile X-ray services for nursing home residents in high-income countries are of comparable image quality to X-ray examinations at hospitals. Mobile X-ray services minimize patient transfers to and from hospitals, increase the number of examinations carried out, and facilitate timely diagnosis and treatment access.

Image quality is a central aspect of X-ray imaging for correct patient diagnosis. The most commonly performed X-ray examinations are for the chest, hip, pelvis, and abdomen. Mobile X-ray examinations seem to increase the certainty of the presumptive diagnosis, which prevents the need for surgery in most cases. The mobile X-ray devices enable the treatment of nursing home residents at home and are considered a reasonable alternative to fixed hospital X-ray equipment. Thus, the surge in demand for mobile X-ray services has promoted the growth of the segment in the market.

The X-Ray services at hospitals and mobile medical imaging units are comparable in terms of quality and several studies have stated that mobile X-ray services are cost-efficient. The surge in popularity of mobile X-ray technology has enabled technologists to venture out of fixed X-ray rooms and render their services. The surge in the elderly and bedridden population has propelled the demand for better bedside

imaging devices and services, which has moved from computer radiography or analog to digital. Although obtaining high-quality images of severely ill patients admitted to intensive care units is a time-consuming task and also logistically difficult, additional advances in power management and wireless capabilities of mobile diagnostic imaging technologies have made it possible. These factors have promoted and accelerated the market during the forecast period. Mobility and image quality are key drivers of this trend and wireless connectivity and battery life are areas where most suppliers can improve. There has been a noticeable rise in mobile imaging services, especially in acute care settings, such as the emergency department, operating rooms, and ICUs due to the COVID-19 impact.

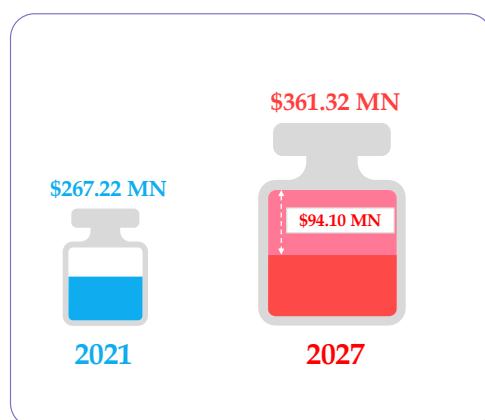
The technological advances in mobile X-ray equipment have fueled the segment's growth in the global mobile medical imaging services market. For example, Carestream has launched a new version of its DRX-Revolution Mobile X-Ray System. Such a wireless digital x-ray system is the first machine with a fully collapsible shaft. The machine stands only four feet tall in its completely retracted state, making maneuverability around the hospital easier. With two touchscreen displays, one on the body of the machine and one that hovers over the patient, the DRX-Revolution lets the technologist adjust at any angle. Features such as the easy-to-position tube head and excellent digital image quality in the device have enabled radiology professionals and physicians to treat critically ill patients.

X-ray examinations using mobile imaging devices slow down processing speeds and eliminate long wait times. Radiation exposure is one of the major health concerns for both patients and staff when using traditional medical imaging equipment. However, studies have shown that portable radiation equipment significantly reduces radiation exposure. A shield mounted on the front of the portable X-ray device protects users from scattered radiation. Significant advances in digital radiology are expected to drive market growth. Portable X-ray machines offer potential socioeconomic benefits by minimizing the use of ambulances and reducing the number of staff traveling to and from the hospital. Mobile X-ray services help lower the overall healthcare costs of patients affected by several conditions. Advances in mobile medical imaging technology and the evolution of digital radiography (DR) or X-ray equipment have propelled the demand for mobile medical imaging services. Digital radiology relies on finely tuned sensors to offer

high-quality images using lower radiation amounts than conventional computed radiography. The integration of digital X-Ray capabilities with mobile cart-based systems enables providers to conduct imaging exams anywhere, even at patients' homes. Also, mobile X-Ray devices offer quicker test turnaround times and contribute to a faster diagnosis. Thus, technological advances and the surge in demand for medical imaging services will contribute to the growth of the segment during the forecast period.

Exhibit 20 Global Mobile Medical Imaging Services Market By Mobile X-ray: Incremental & Absolute Growth

INCREMENTAL GROWTH



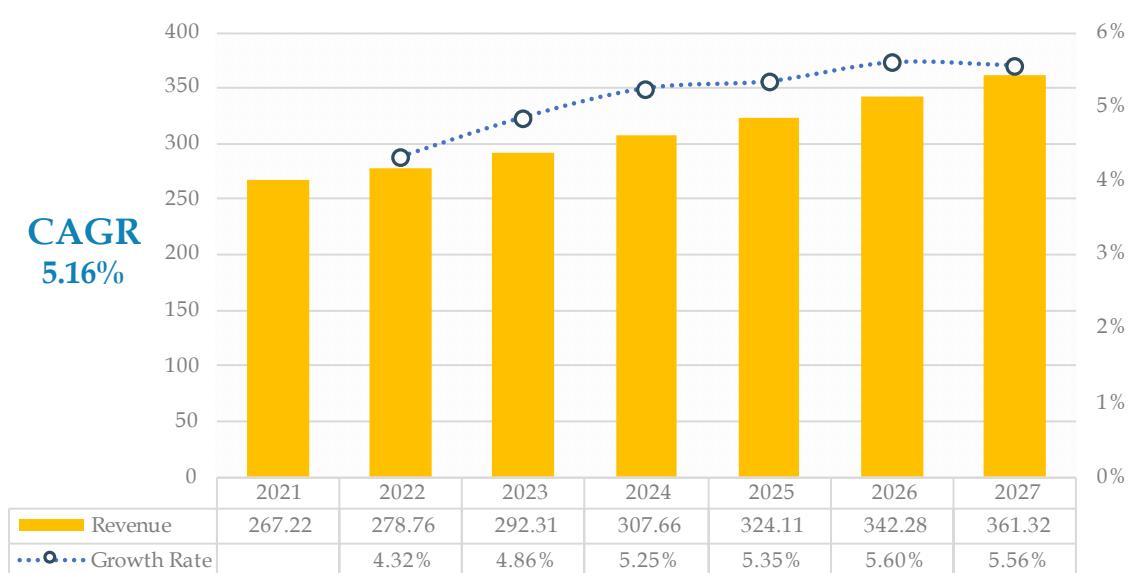
ABSOLUTE GROWTH



Source: Arizton

12.3.2 Market Size & Forecast

Exhibit 21 Global Mobile Medical Imaging Services Market By Mobile X-Ray 2021–2027 (\$ million)

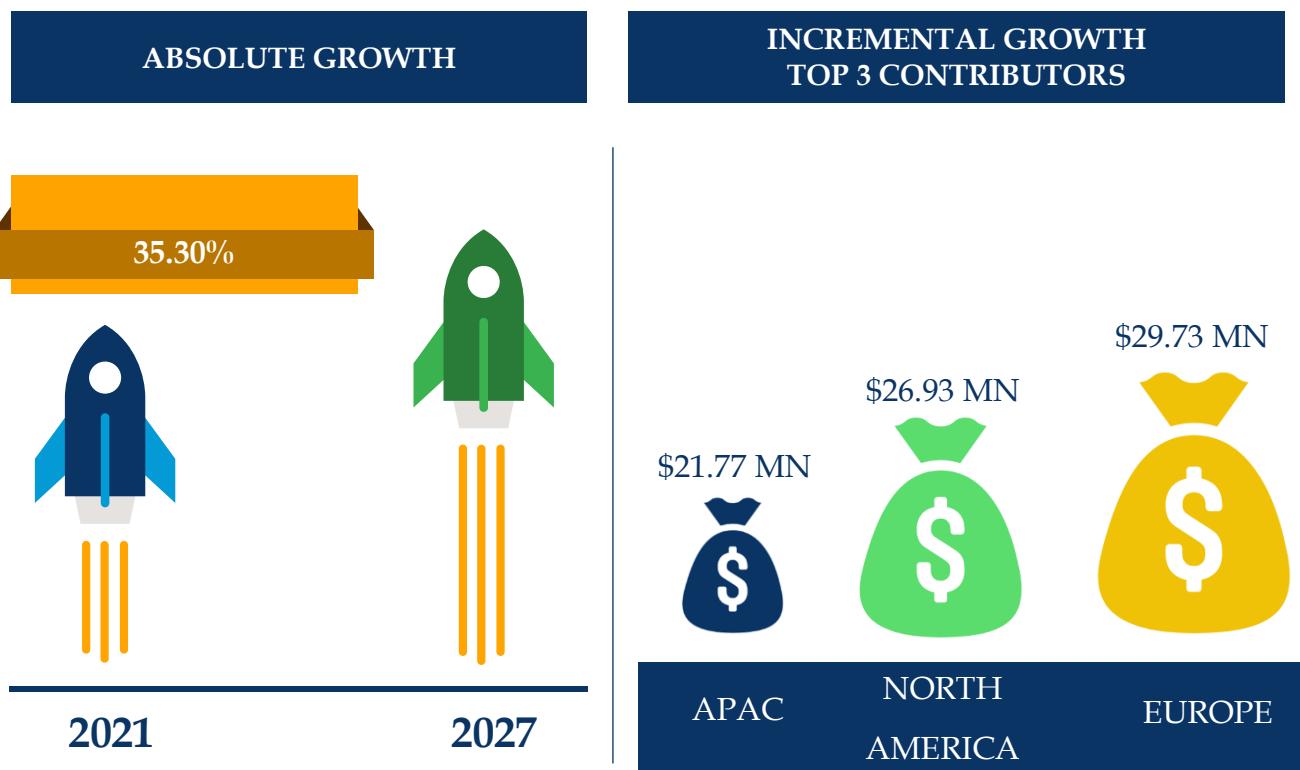


In 2021, the mobile X-Ray segment of the market was valued at **\$267.22** million, which is expected to grow at a CAGR of **5.16%** to reach **\$361.32** million by 2027.

12.3.3 Mobile X-ray: Market By Geography

Exhibit 22 Incremental Growth by Geography 2021 & 2027 (\$ million)

REGION	2021	2027	CAGR
NORTH AMERICA	\$81.05 MN	\$107.98 MN	4.90%
EUROPE	\$69.47 MN	\$99.20 MN	6.12%
APAC	\$56.28 MN	\$78.06 MN	5.60%
LATIN AMERICA	\$33.38 MN	\$41.12 MN	3.53%
MIDDLE EAST & AFRICA	\$26.85 MN	\$34.93 MN	4.48%



12.4 MOBILE CT

12.4.1 Market Overview

Computed tomography (CT) is an invaluable tool in the diagnosis of many clinical conditions. Several advances in biomedical engineering have increased speed, better detectability, and better image quality with low contrast and lower radiation levels. Portable or mobile computed tomography has become one such important advance. This is especially useful when evaluating critically ill ICU patients by scanning them at the bedside. A paradigm shift in the use of mobile computed tomography has been its installation in ambulances to treat acute stroke. The CT scanner computer has 2D images of the body slice being processed, typically 0.04 to 0.4 inches thick, and combines the 2D images to create a 3D body image, providing significantly higher image quality.

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. The convenience of mobile CT scanners and the reduction of capital investment can offset operating costs with a significant margin. Another reason is that the installation time is reduced, and logistical issues are minimized. 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 the use of 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 locally.

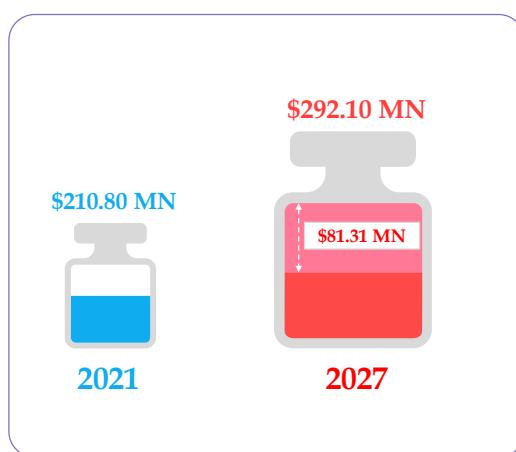
The main important scenario was the surge of COVID patients and their saturation detection. The crowding of patients in the hospitals can result in a significant increase in cases. Mobile CT scanners are used in a particular locality. A Mobile CT scanner provides 3D imaging of the lungs of critically ill COVID patients and is rapidly deployable for surge planning. Even if clinicians desire a CT scan of a patient with COVID-19 to monitor treatment response, a safe method for patient transport is necessary. The chest CT was considered beneficial in the treatment management of

COVID-19 because it could determine the severity and extent of COVID-19 pneumonia. Mobile CT allows a rapid diagnosis of COVID-19 while minimizing the risk of infection. Thus, mobile CT scanning has proven essential in diagnosing and managing COVID-19.

The development of the computed tomography devices market is shaped and influenced by the progress in the social, economic, and technological scenarios in many countries worldwide. Computerized tomography (CT) machines have hugely succeeded in hospital settings. The portable CT imaging market has seen an increase in opportunities from the successful use of CT technology in treating tumors, trauma, chronic unexplained headache, and staging of various diseases. The non-invasive nature of CT devices is a major health proposition for the popularity of these devices among patients. The market is driven by improvements in the outcomes and efficacy of CT scanners, higher flexibility, and reductions in current and capital expenditures. The high safety and sensitivity of computed tomography devices are key aspects in expanding the computed tomography devices market. The rising demand for portable CT scanners in diagnostic services in developing and developed countries is a major trend that enhances opportunities in the CT imaging devices market.

Exhibit 23 Global Mobile Medical Imaging Services Market By Mobile CT: Incremental & Absolute Growth

INCREMENTAL GROWTH



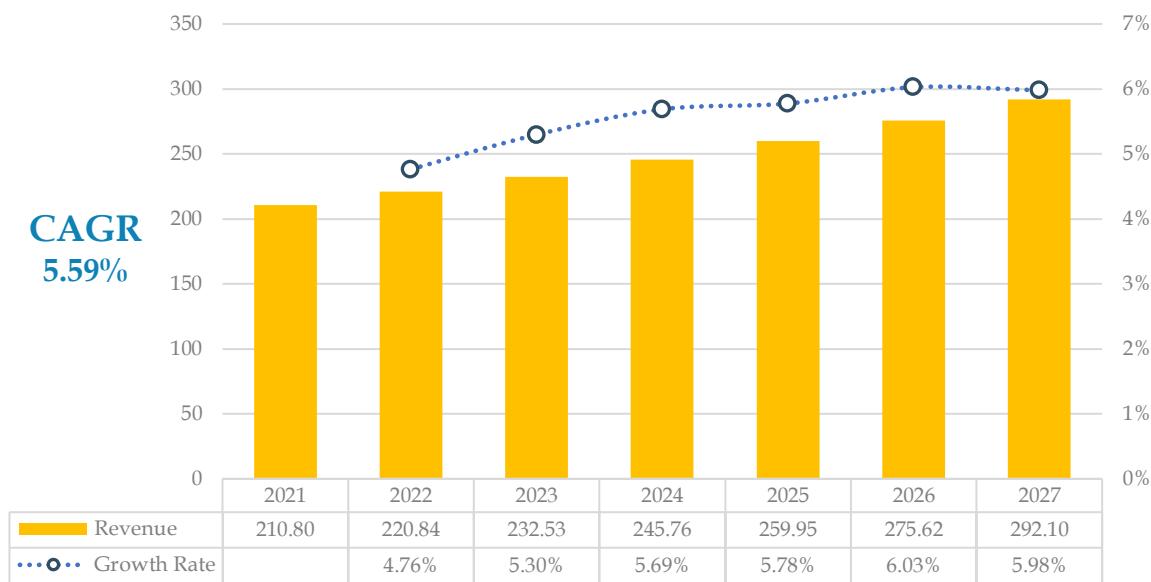
ABSOLUTE GROWTH



Source: Arizton

12.4.2 Market Size & Forecast

Exhibit 24 Global Mobile Medical Imaging Services Market By Mobile CT 2021–2027 (\$ million)



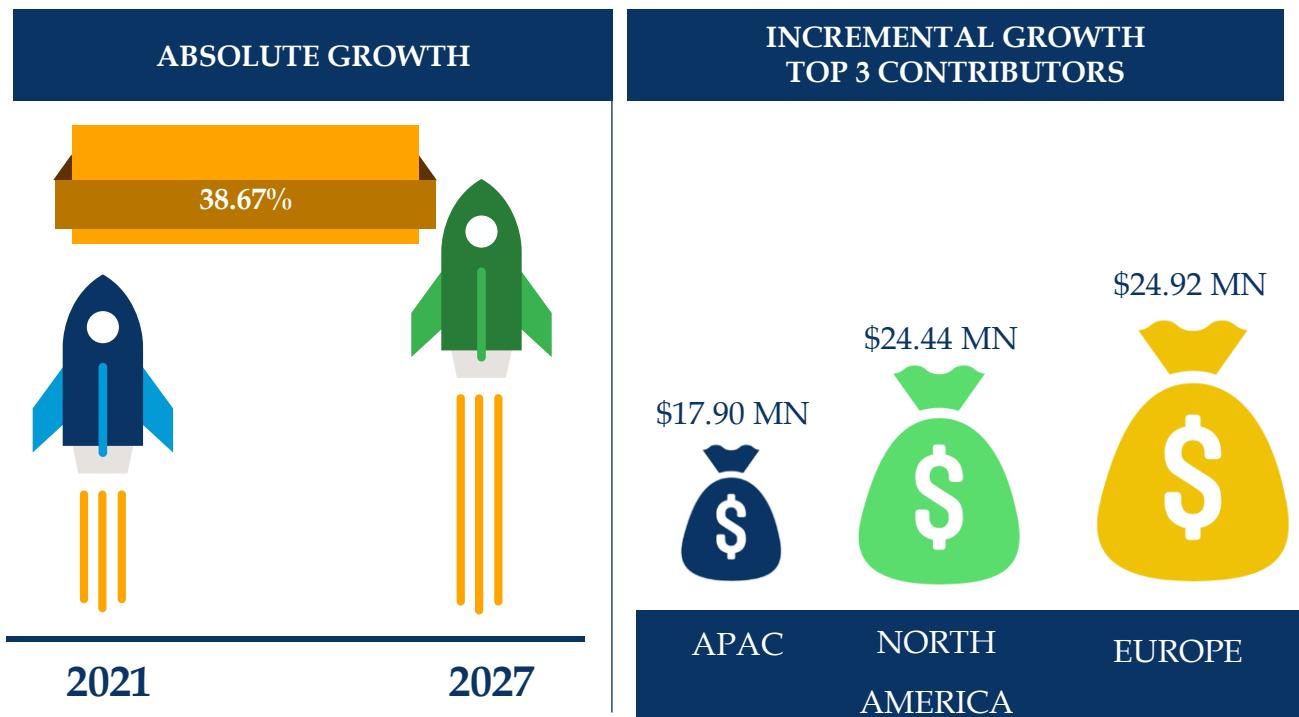
Source: Arizton

In 2021, the mobile CT segment of the market was valued at \$210.80 million, which is expected to grow at a CAGR of 5.59% to reach \$292.10 million by 2027.

12.4.3 Mobile CT Market By Geography

Exhibit 25 Incremental Growth by Geography 2021 & 2027 (\$ million)

Region	2021	2027	CAGR
NORTH AMERICA	\$64.84 MN	\$89.28 NM	5.47%
EUROPE	\$56.43 MN	\$81.34 NM	6.29%
APAC	\$41.94 MN	\$59.84 MN	6.10%
LATIN AMERICA	\$26.43 MN	\$33.66 MN	4.11%
MIDDLE EAST & AFRICA	\$21.06 MN	\$28.06 MN	4.90%



12.5 MOBILE EKG

12.5.1 Market Overview

An electrocardiogram (ECG or EKG) is a non-invasive tool that helps diagnose cardiovascular issues. EKG measures the electrical signals of the heart to identify irregularities in rhythm, arterial obstruction or blockage, and other heart conditions. An ECG records the electrical signals of the heart. This is a common, painless test used to quickly detect heart problems and monitor heart health. During ECG, up to 12 sensors (electrodes) can be attached to the chest and limbs. The electrodes are a sticky patch with wires that connect to the monitor. The computer records the information and displays it as a wave on the monitor or paper. Portable devices can also be used for mobile imaging and for anyone who wants to monitor their heart health at home.

The mobile ECG monitors have built-in sensors that record heart activity. It can hold the patient's fingers against the sensors or wear them on their wrists or bodies. Some devices also have built-in screens that users can use to view their heart rhythm. Doctors can use an EKG to diagnose coronary artery disease. Physicians use them to check heart rhythms, and poor blood flow to the heart muscle, diagnose a heart attack, or check on problems such as thickened heart muscles. If the patient complains of being light-headed, having palpitations, or passing out, an EKG would be a good first test to run. The miniature wireless ECG sensor captures the human body's ECG signal with a single read. It sends the processed ECG data to the mobile phone via Bluetooth transmission technology for ECG waveform, heart rate display, and ECG data storage. Wireless ECG sensors have the advantages of easy operation, high accuracy, strong anti-interference capabilities, and excellent real-time performance. Long-term monitoring of arrhythmias and other illnesses.

The electrocardiogram converts the electrical activity of the heart into paper traces. The spikes and valleys in the trace are called waves. Doctors and other healthcare providers read these waves to diagnose heart problems. EKG measures the rate and rhythm mechanism of the heart, positions of the heart in the chest, and patterns of abnormal electric activity that may cause abnormal cardiac rhythm. An EKG shows evidence of increased thickness of the heart muscle, damage to various parts of the heart, and impaired blood flow. The electrocardiogram is a non-invasive and painless

test that provides doctors with quick results. Other information that an electrocardiogram can provide includes helping diagnose heart attacks and checking for electrolyte abnormalities, such as high potassium or high calcium.

According to the United Nations Department of Economic and Social Affairs, there will be an estimated 727 million people aged 65 in 2020. This number is expected to more than double by 2050 and reach over 1.5 billion people. According to US Census Bureau, the senior population in the US is projected to reach 77 million by 2034. The proportion of aged people in the world population is expected to rise from 9.3 % in 2020 to 16.0 % in 2050. By the 20th century, every sixth person in the world will be 65 or older. With the rise in the elderly population, there would be an increase in the prevalence of cardiac diseases. Thus, the surge in the incidence rate of cardiovascular diseases and the need for the continuous monitoring of these conditions will contribute to the segment's growth.

Exhibit 26 Global Mobile Medical Imaging Services Market By Mobile EKG: Incremental & Absolute Growth

INCREMENTAL GROWTH



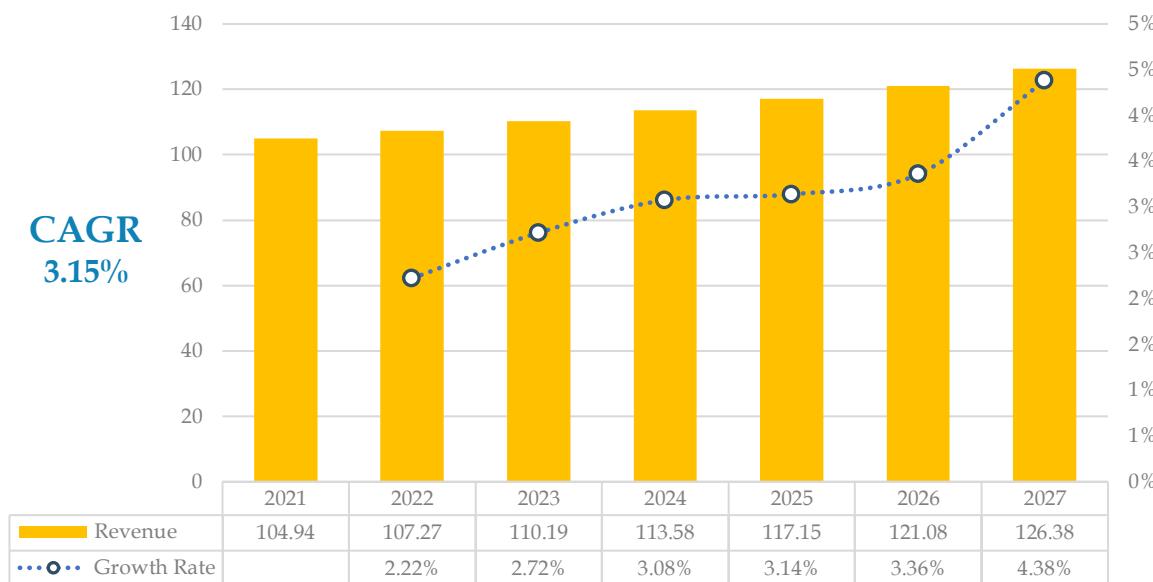
ABSOLUTE GROWTH



Source: Arizton

12.5.2 Market Size & Forecast

Exhibit 27 Global Mobile Medical Imaging Services Market By Mobile EKG 2021–2027 (\$ million)



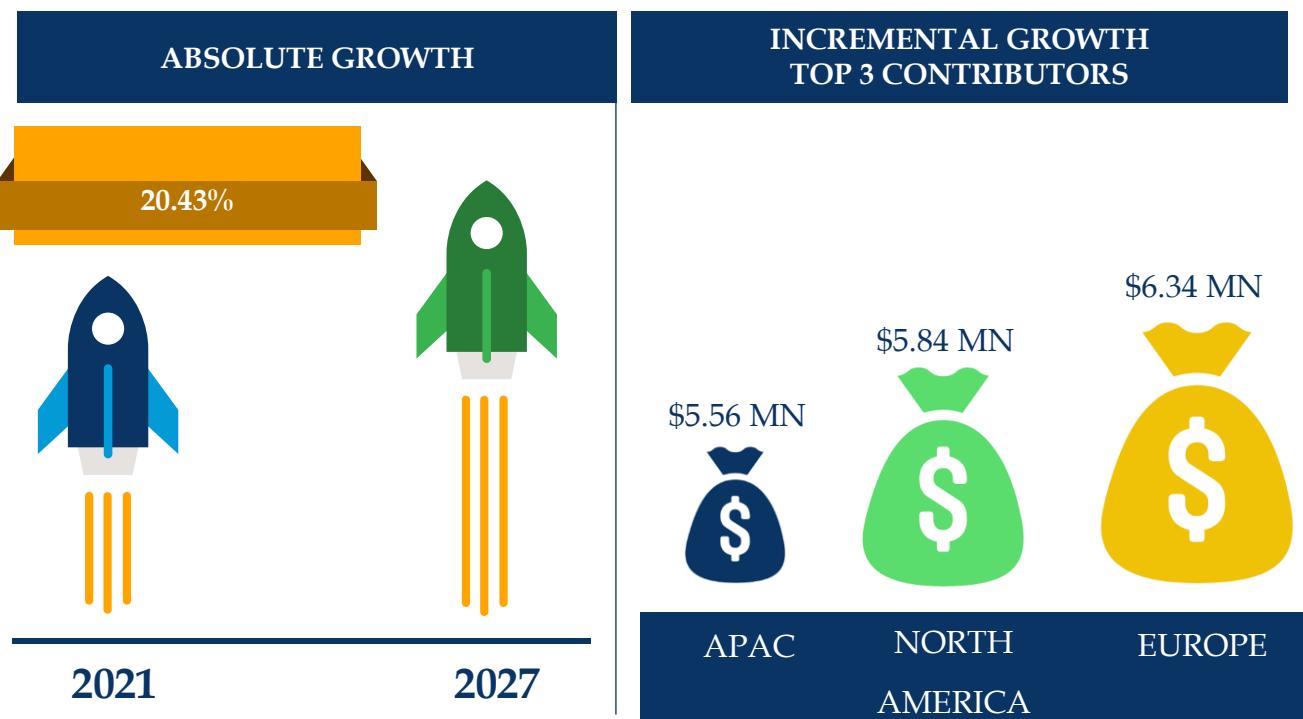
Source: Arizton

In 2021, the mobile EKG segment of the market was valued at \$104.94 million, which is expected to reach \$126.38 million by 2027 to grow at a CAGR of 3.15%.

12.5.3 Other: Market By Geography

Exhibit 28 Incremental Growth by Geography 2021 & 2027 (\$ million)

REGION	2021	2027	CAGR
NORTH AMERICA	\$32.42 MN	\$38.26 MN	2.80%
EUROPE	\$27.79 MN	\$34.12 MN	3.48%
APAC	\$21.61 MN	\$27.17 MN	3.89%
LATIN AMERICA	\$12.80 MN	\$14.26 MN	1.82%
MIDDLE EAST & AFRICA	\$10.26 MN	\$12.49 MN	3.33%



12.6 MOBILE ULTRASOUND

12.6.1 Market Overview

A mobile ultrasound machine is a medical imaging machine that uses ultrasound to diagnose clinical, laboratory, and hospital settings and their services. The mobile ultrasound systems are designed to be used in small spaces, at a patient's bedside, or in the field. It can be cart-based, tablet-based, or hand-carried. The difference between stationary ultrasound machines and mobile ultrasound imaging involves simplified front-end electronics, reduced memory usage, and lower computational cost in the post-processing ends of the system. Mobile ultrasound devices are attractive in developing regions due to the rising demand for ambulatory care.

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 developed countries such as the US, the demand for mobile ultrasonic devices is also growing. Thus, the segment is expected to grow rapidly during the forecast period due to its effectiveness in providing mobile assistance. With the growing demand for mobile health and advances in ultrasound diagnostics, a few small players are entering the market and holding a significant share. With the ability of mobile ultrasound to move across, usage in quick diagnoses, and enhance workflow, mobile ultrasound machines have been adopted in daily practice by many specialties, including cardiology, vascular, radiology, endocrinology, pediatrics, obstetrics, and gynecology due to their fast-paced nature, emergency and critical care services were early adopters of ultrasound to advance the speed and accuracy of patient care. The new technologies and artificial intelligence are being integrated into mobile ultrasounds systems to get faster and more accurate and help clinicians increase confidence in their diagnoses. This type of demand and requirement for the services is expected to accelerate the segment's growth in the market.

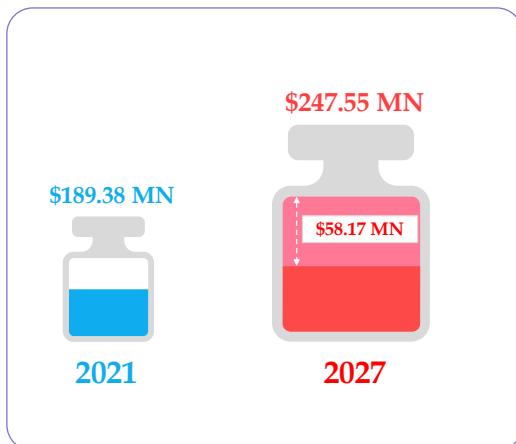
According to the Journal of Medical Science, the ultrasound patrol program in Morocco uses portable ultrasound machines and 3D smartphones to improve diagnostic times for expectant mothers. The many studies' high rates identify the need for ultrasound services in rural communities and pathologies. This high demand promotes the growth of the segment in the market. Ultrasound technology continues to evolve along with the growing demand for instant solutions. New

inventions have created mobile ultrasound machines that can be carried in a lab coat pocket and taken with even the most remote patients. The advantages of portable ultrasound devices and ultrasound imaging as a diagnostic tool have been widely recognized. The revolutionary mobile ultrasound services with mobile imaging devices are expected to further expand imaging technologies in-home healthcare and mobile services. The low cost of mobile ultrasonic devices is a major factor contributing to their widespread adoption. 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 elders.

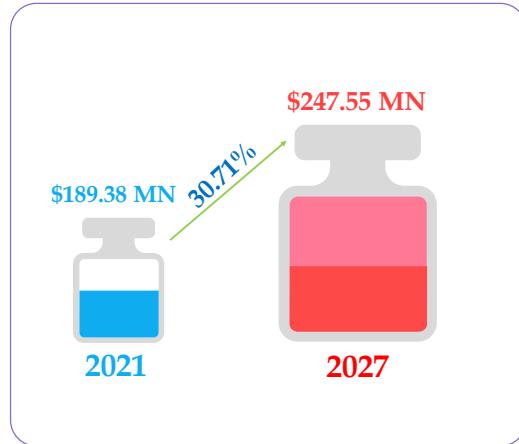
The prevalence of chronic diseases and advances in technology promote mobile medical imaging services. The introduction of mobile ultrasound devices and services across emerging areas, including critical care medicine, emergency medicine, anesthesiology, and musculoskeletal, will foster the segment demand across the region. The enhanced access to medical imaging and addressing the issue of maternal death and newborn deaths increase the growth of the segment. According to World Health Organization, every day in 2017, approximately 810 women succumbed to preventable causes related to pregnancy and childbirth. The increasing awareness of mobile medical imaging services can reduce maternal complications in developing countries and increase mobile ultrasound services. These devices have become sought-after to reduce downtime and boost reliability. The machines have gained popularity for easy access to ultrasound when space is constrained. With the surge in demand for ambulatory services, the segment is expected to grow during the forecast period.

Exhibit 29 Global Mobile Medical Imaging Services Market By Mobile Ultrasound Incremental & Absolute Growth

INCREMENTAL GROWTH



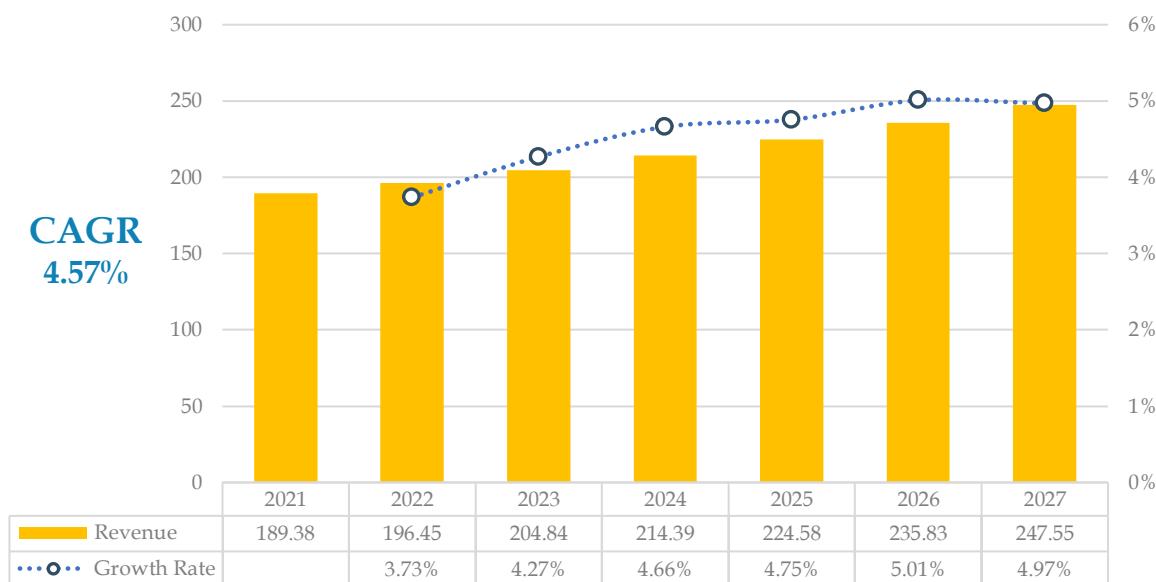
ABSOLUTE GROWTH



Source: Arizton

12.6.2 Market Size & Forecast

Exhibit 30 Global Mobile Medical Imaging Services Market By Mobile Ultrasound 2021–2027 (\$ million)



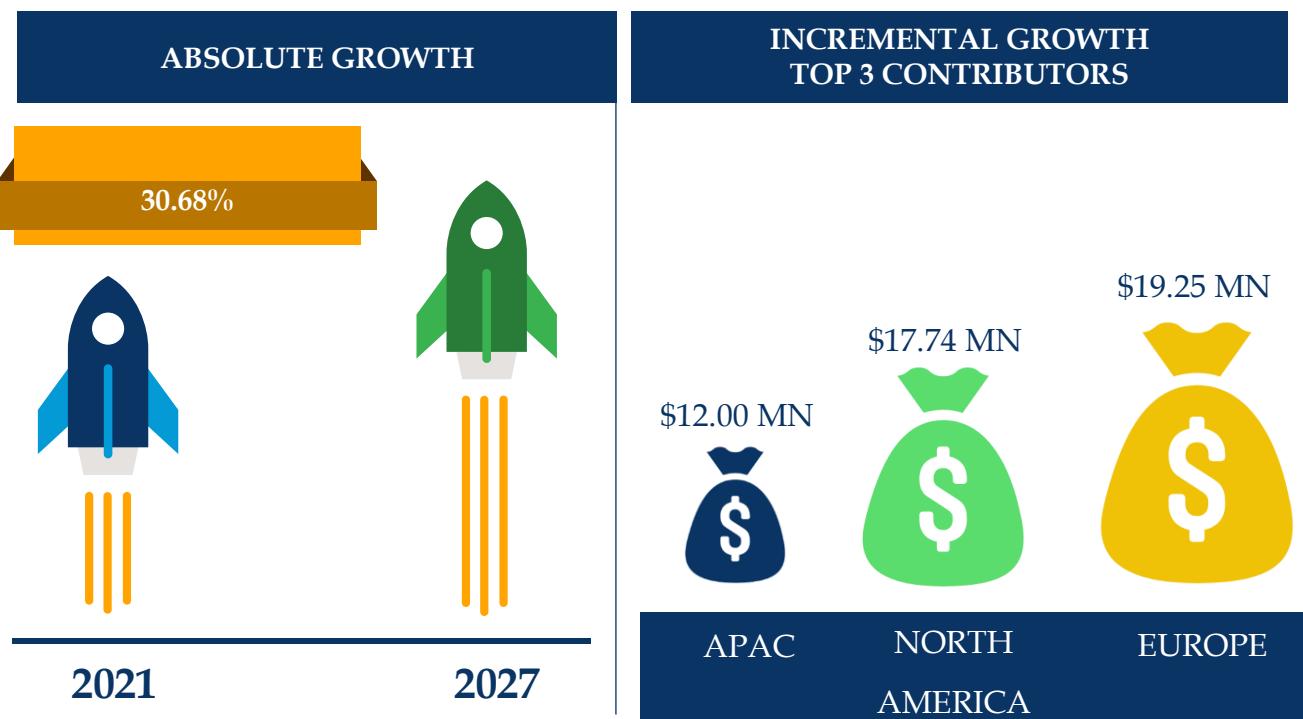
Source: Arizton

In 2021, the mobile ultrasound segment of the market was valued at \$189.38 million, which is expected to grow at a CAGR of 4.57% to reach \$247.55 million by 2027.

12.6.3 Other: Market By Geography

Exhibit 31 Incremental Growth by Geography 2021 & 2027 (\$ million)

REGION	2021	2027	CAGR
NORTH AMERICA	\$58.36 MN	\$76.10 MN	4.52%
EUROPE	\$50.19 MN	\$69.44 MN	5.56%
APAC	\$38.31 MN	\$50.30 MN	4.65%
LATIN AMERICA	\$24.06 MN	\$28.19 MN	2.67%
MIDDLE EAST & AFRICA	\$18.55 MN	\$23.57 MN	4.07%



12.7 MOBILE MRI

12.7.1 Market Overview

Mobile MRI improves access to medical care while offering the same diagnostic performance as stationary MRI systems. 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 imaging in healthcare applications is evolving rapidly due to its diverse uses. Mobile MRI consists of a tractor or the van and trailer that holds the MRI scans in place. It also includes extracorporeal shock wave lithotripsy units and gamma cameras that enable mobile medical imaging. Mobile MRI scanners typically have a higher cost of ownership, but mobile technology can serve multiple facilities in a given geographic area.

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 is driving the demand for this technology. Mobile MRI units can provide medical services to patients who have been deprived of this medical technology, for example, in poor areas that do not have access to MRI scans. Mobile imaging brings the services to patients ever faster. The technology used for mobile MRIs is rapidly changing; There is increasing interest in new ways of using this technology. These systems are completely safe from radiation and other ill effects. All these factors promote the high demand and desire to use the services at the patients' comfort, ultimately leading to the segment's growth in the market.

Mobile units in the mobile MRI services typically withstand external conditions of -20°F to 110°F, depending on air-conditioning, heating, and humidification units to maintain proper environmental conditions inside the trailer. So, the service vehicle withstands all the climatic changes as well. There is an increased requirement for vehicle maintenance in the service due to the torque, vibration, shock, and vertical and lateral movement. This leads to maintaining uninterrupted services, and growing the mobile medical imaging services market. Recent technology advances allow mobile MRI units to be parked closer to patient areas and parking lots. Instead, installing a fixed MRI may require a large amount of remodeling and construction

and become cost-prohibitive. This contributes to the growth and the increased usage of the segment in the market.

Many obstacles are faced by the patient who may not have the imaging facility services nearby, which can help guide their treatment. Some places do not have a hospital and therefore do not have a facility to perform the scan. In some places, the hospital serves more people than it should, causing any appointments or tests to wait before a patient can be seen. Still, other places have hospitals that may not be overcrowded but do not have space in the facility for a radiology department. For such scenarios, mobile medical imaging services have their importance and change the healthcare scenario of a particular area. According to General Electric Company, Mobile MRI scanners have become increasingly popular in the US, with nearly 700 mobile MRI scanners in use by 1987 and continuing to use in many numbers.

In 2020, the American Cancer Society estimated that approximately 1.8 million new cancer cases would be diagnosed in the US. Many of these cancer types can be detected and managed using MRI technology. The rise in chronic diseases such as cardiovascular disease, endocrine disorders, cancer, neurological and lung disorders, and gastrointestinal diseases is driving demand for mobile imaging services. The increased risk of musculoskeletal problems, brain disorders, and heart diseases among the elderly is driving the expansion of mobile imaging services. The services provide accessibility by minimizing patient wait times and encouraging market growth across the region.

Exhibit 32 Global Mobile Medical Imaging Services Market By Mobile MRI: Incremental & Absolute Growth

INCREMENTAL GROWTH



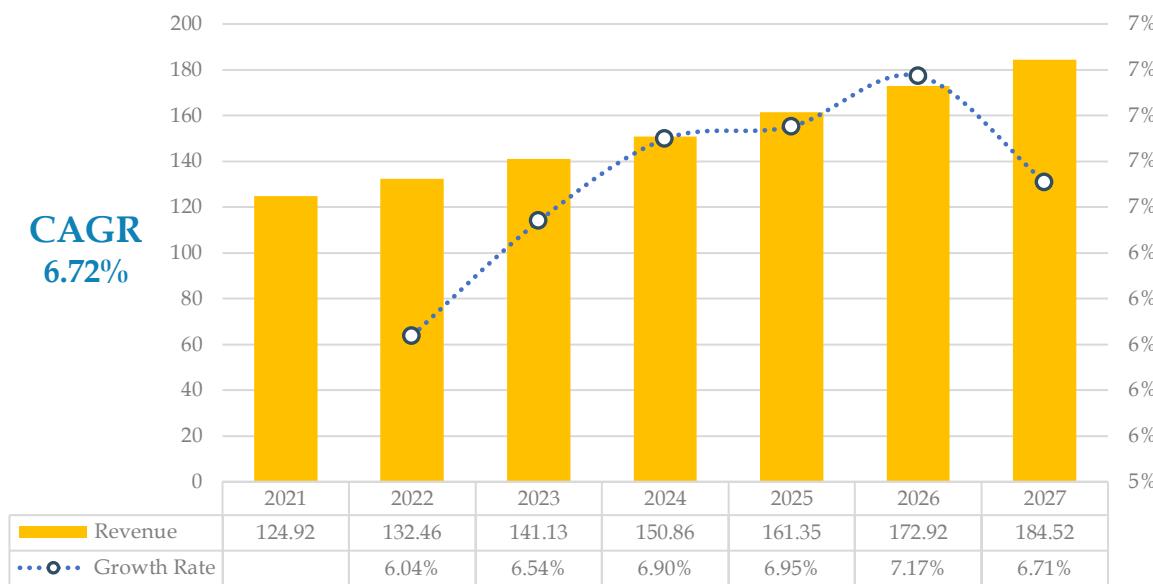
ABSOLUTE GROWTH



Source: Arizton

12.7.2 Market Size & Forecast

Exhibit 33 Global Mobile Medical Imaging Services Market By Mobile MRI 2021–2027 (\$ million)



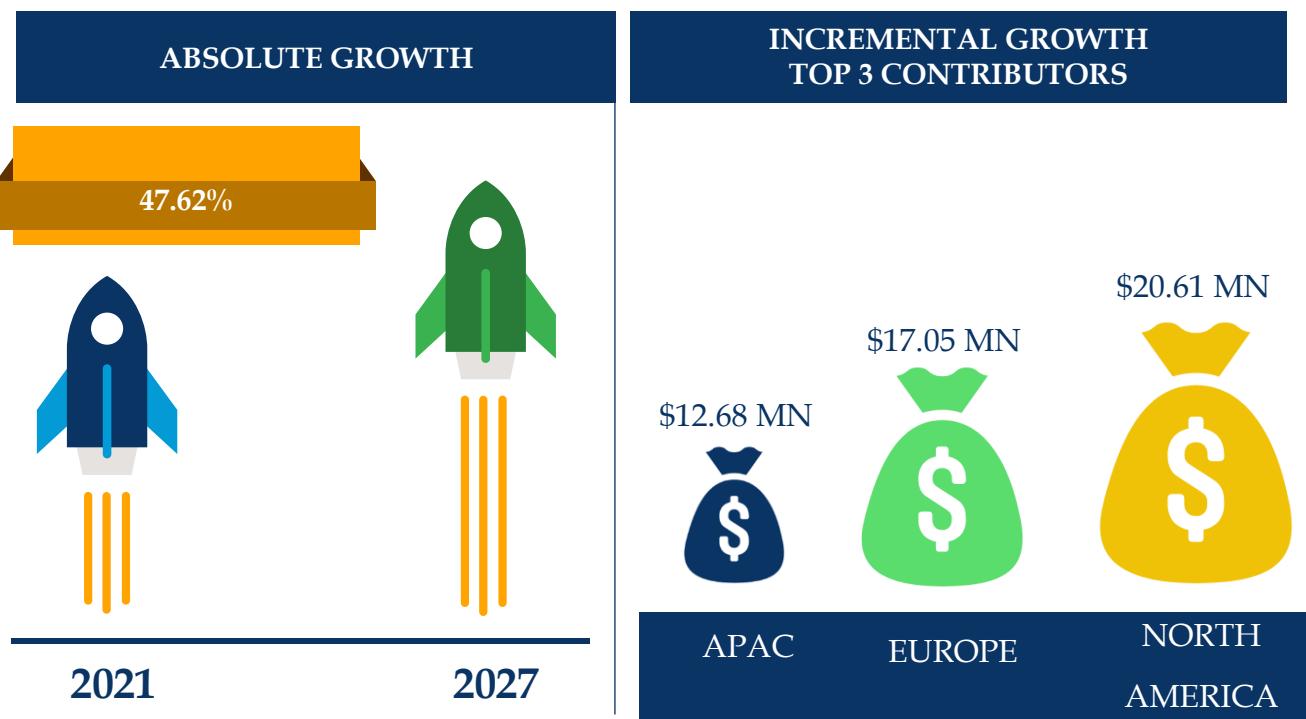
Source: Arizton

In 2021 the mobile MRI segment of the market was valued at **\$124.92** million, which is expected to grow at a CAGR of **6.72%** to reach **\$184.52** million by 2027.

12.7.3 Mobile MRI: Market By Geography

Exhibit 34 Incremental Growth by Geography 2021 & 2027 (\$ million)

REGION	2021	2027	CAGR
NORTH AMERICA	\$38.91 MN	\$59.52 MN	7.34%
EUROPE	\$33.74 MN	\$50.79 MN	7.05%
APAC	\$24.61 MN	\$37.29 MN	7.17%
LATIN AMERICA	\$15.58 MN	\$19.73 MN	4.02%
MIDDLE EAST & AFRICA	\$12.11 MN	\$17.12 MN	5.93%



12.8 OTHERS

12.8.1 Market Overview

Nuclear medicine determines the reason for the medical problem based on the organ, tissue, or bone function. Nuclear medicine imaging entails the use of minuscule amounts of radioactive materials known as radiotracers or radiopharmaceuticals to diagnose, evaluate, and treat various diseases, such as neurological disorders, cardiovascular diseases, and cancers. A patient receives a small amount of radiopharmaceutical, just enough to provide sufficient diagnostic information. The mobile nuclear imaging services allow greater patient convenience, higher patient satisfaction, improved outcomes, and better location potential. The convenience and affordability are benefits of mobile nuclear imaging services. These services eliminate the patient's discomfort when traveling long distances to obtain special diagnostic imaging from specific healthcare providers. These mobile clinics take total care of their patients from their set-up to taking images and processing the obtained data. The benefits of mobile nuclear imaging services are significant. The services provide a non-invasive and painless test that can detect problems at the molecular level.

Factors such as technological advances, the rise in diagnostic applications in various diseases such as cancer and cardiovascular disease, government support, and the transition from standalone to hybrid modality are expected to drive market growth. Also, 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. According to WHO, cancer was the leading cause of death in 2020 as nearly 10 million people succumbed to the disease. By 2025, about 19.3 million new cancer cases are expected to be reported worldwide each year. According to WHO, in 2019, 17.9 million people worldwide died of cardiovascular diseases, which was about 32% of deaths worldwide. According to estimates, the death toll associated with cardiovascular diseases is expected to reach 23.3 million by 2030. Nuclear medicine plays an important role in diagnosing and treating these diseases. The increased occurrence of these diseases is identified with image-guided methods by accurately targeting the lesion tissue. Molecular imaging, which provides detailed images of what is happening in the body at the molecular and

cellular levels, is one of the most profitable areas of imaging technology. Nuclear medicine imaging has applications in molecular targeting and has the potential to drive mobile medical imaging services market growth in the future.

Mammography screening is the most powerful tool for detecting early-stage breast cancer. Mobile mammography could fill this gap by offering free or cheap mammography screening, servicing women in the neighborhood, and removing cost and transportation barriers. Mobile mammography clinics can effectively reach women who are not medically adequately serviced. Obesity mammography is a strategy for improving access to mammography screening. These programs typically offer free or cheap mammography screening, serve nearby women, and remove cost and transportation barriers. According to American Roentgen Ray Society-ARRS, the detection rate of breast tumors using mobile mammography is significantly higher than the detection rate of age-adjusted breast tumors in the general population, and 68% of women with breast tumors diagnosed using mobile mammography are uninsured.

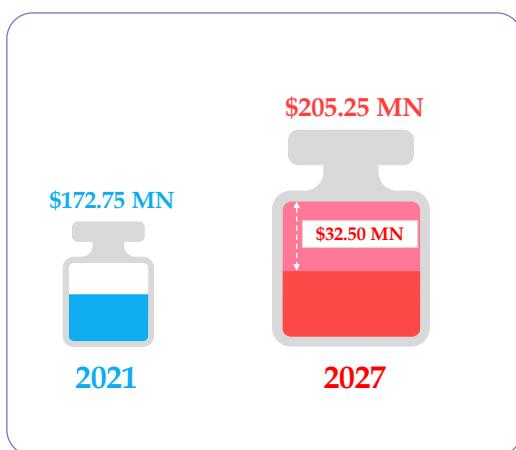
Mobile mammography devices are further expanding the healthcare system market to the community. Regular screenings in rural and urban areas can generate new sources of income and provide better service to the community. It reduces many breast cancer screening barriers faced by women who are not medically adequately serviced. With the increasing incidence of invasive breast cancer worldwide, the industry's demand for mammography systems will increase over the next few years. Breastcancer.org states that about one in eight women will develop invasive breast cancer at some point in their lives. Breast cancer-related risk factors such as hormone replacement therapy, genetic factors, births, and increased adoption of unhealthy lifestyles contribute significantly to the growing acceptance of breast imaging methods. They are in demand in the global market over the projected years. These mobile services are relatively inexpensive, and the generated images can be converted to digital format using computer radiography. Therefore, the introduction of cheap, affordable, and technologically advanced systems in developing countries will drive the segment's growth.

Bone densitometers are used to accurately measure bone density and mineral content and help diagnose clinical symptoms such as osteoporosis, which can cause fragile bones that are prone to fractures. Market growth is driven primarily by an increase

in the prevalence of osteoporosis and the aging population. Factors such as the high cost of bone densitometers and low awareness are expected to impede the growth of this market. The market is driven by an increasing elderly population and the consequently increased prevalence of osteoporosis, an increased risk of osteoporosis in menopausal women, and an increased incidence of vulnerable fractures worldwide. However, the surge in bone densitometer mobile services and the launch of multiple health initiatives to raise awareness of osteoporosis during the forecast period are expected to provide a favorable opportunity for market growth.

Exhibit 35 Global Mobile Medical Imaging Services Market By Others: Incremental & Absolute Growth

INCREMENTAL GROWTH



ABSOLUTE GROWTH

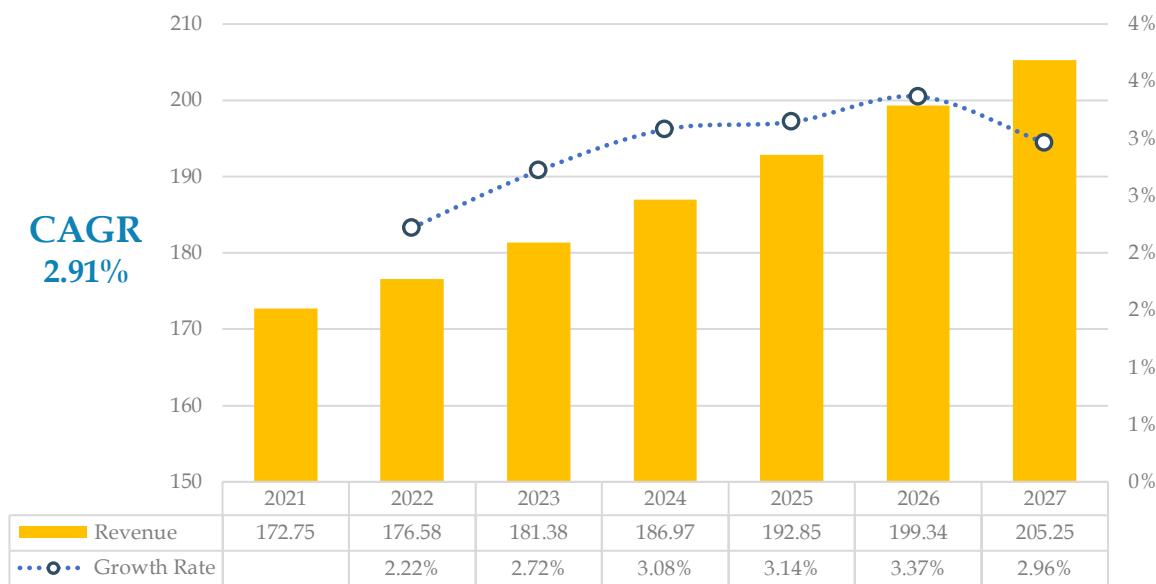


Source: Arizton

12.8.2 Market Size & Forecast

In 2021, the other services type segment of the market was valued at \$172.75 million, which is expected to grow at a CAGR of 2.91% to reach \$205.25 million by 2027.

Exhibit 36 Global Mobile Medical Imaging Services Market by Others 2021–2027 (\$ million)

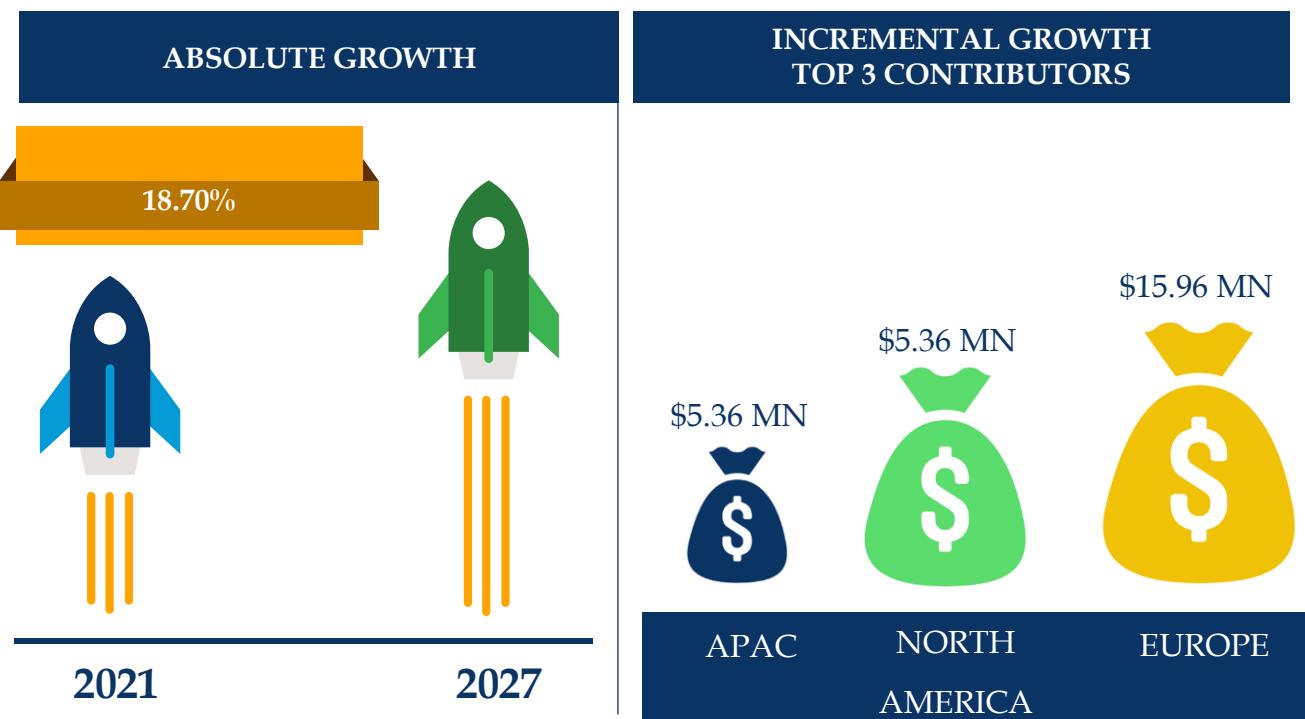


Source: Arizton

12.8.3 Other: Market By Geography

Exhibit 37 Incremental Growth by Geography 2021 & 2027 (\$ million)

REGION	2021	2027	CAGR
NORTH AMERICA	\$48.63 MN	\$53.99 MN	1.76%
EUROPE	\$45.94 MN	\$61.90 MN	5.10%
APAC	\$31.24 MN	\$36.43 MN	2.59%
LATIN AMERICA	\$26.85 MN	\$28.85 MN	1.21%
MIDDLE EAST & AFRICA	\$20.30 MN	\$24.13 MN	2.92%





END USER SEGMENTATION

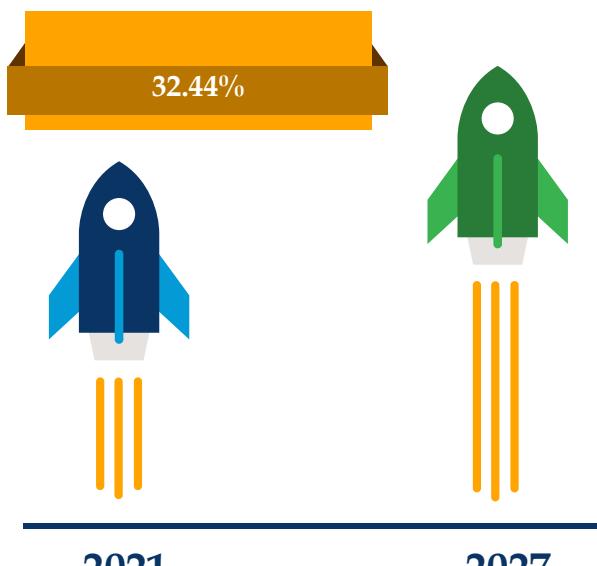
13 END USER

13.1 MARKET SNAPSHOT & GROWTH ENGINE

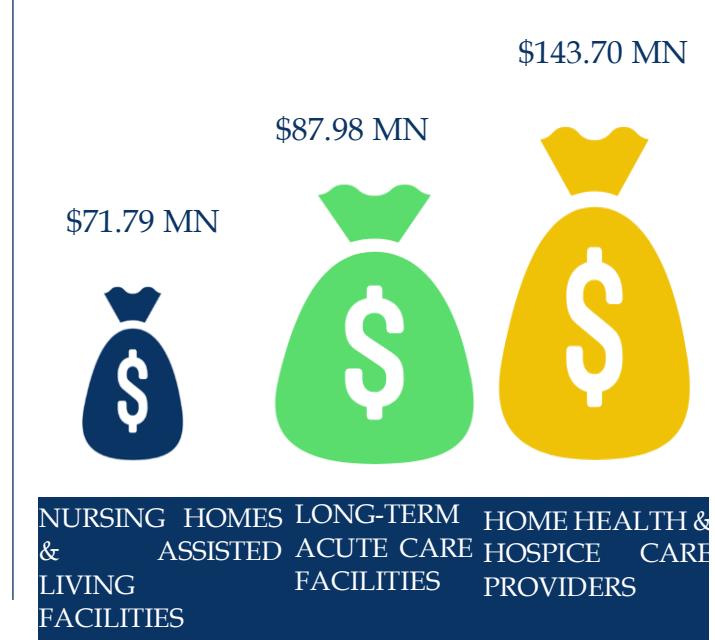
Exhibit 38 Incremental Growth by End User 2021 & 2027

END USER	2021	2027	CAGR
NURSING HOMES & ASSISTED LIVING FACILITIES	\$233.75 MN	\$305.54 MN	4.56%
HOME HEALTH & HOSPICE CARE PROVIDERS	\$371.85 MN	\$515.55 MN	5.60%
LONG-TERM ACUTE CARE FACILITIES	\$275.29 MN	\$363.27 MN	4.73%
OTHERS	\$189.11 MN	\$232.76 MN	3.52%

ABSOLUTE GROWTH



INCREMENTAL GROWTH TOP 3 CONTRIBUTORS



13.2 MARKET OVERVIEW

Exhibit 39 Global Mobile Medical Imaging Services Market By End User

Global Mobile Medical Imaging Services Market by End User

Nursing Homes &
Assisted Living
Facilities

Long-term
Acute Care
Facilities

Home Health &
Hospice Care
Providers

Others

Based on end users, the global mobile medical imaging services market is segmented into nursing homes & assisted living facilities, long-term acute care facilities, home health & hospice care providers, and others. Mobile imaging services can bring significant benefits to nursing homes and long-term care facilities by providing on-site diagnostic imaging services, which further reduce the risk of patient injury and discomfort. These services are there 24/7 during the week, even during holidays. No off-hours facilities are required for medical imaging services.

Furthermore, mobile medical imaging services ensure that healthcare facilities do not have to dispatch their staff to transport residents who require medical imaging to a third-party medical imaging facility. Also, mobile imaging solutions ensures the safety and comfort of nursing home residents as it prevents discomfort and anxiety. The rise in the adoption of mobile imaging services will improve the image quality and make it easier to transport equipment that provides immediate results using diagnostic radiology solutions coveted by diagnostic imaging professionals. The result is a technology with high acceptance rates in providers such as nursing homes and long-term care facilities. In addition, consumers are also helping to drive the transition to more advanced forms of imaging. The latest advances in digital medical imaging systems help reduce patient anxiety by allowing evaluation in the care facility itself. In addition, mobile imaging minimizes the frequency of hospital transfers, reduces waiting times, increases the number of tests performed, and improves access to timely diagnostics and treatments.

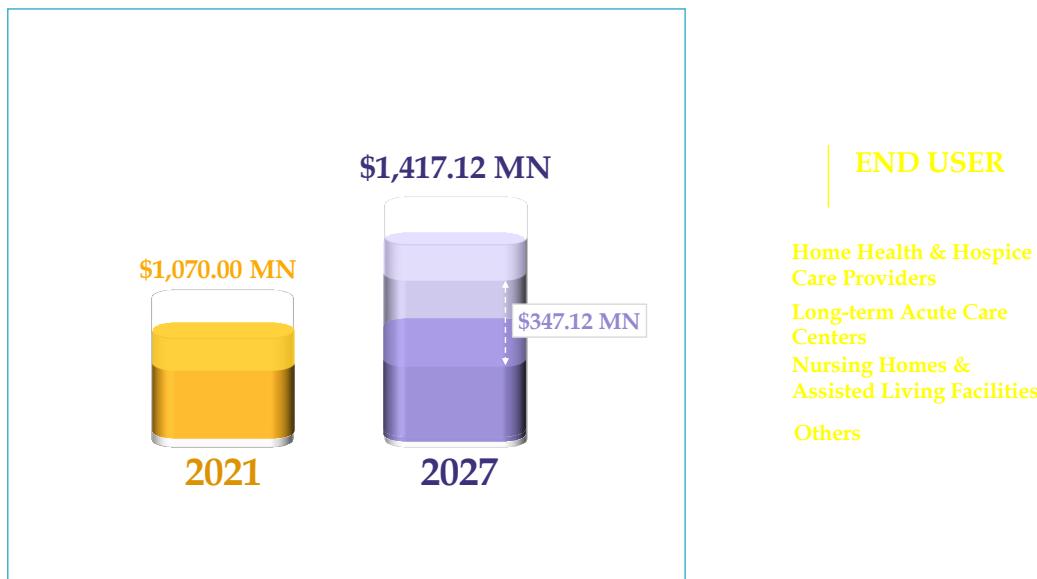
Home nursing and hospice care are still some of the most fragmented healthcare sectors, with many independent players having large market shares in their respective regions. Mobile devices make it possible to provide imaging services to patients with limited space and cost. Mobile imaging services provide X-rays, EKG, and ultrasounds to healthcare facilities, families, and businesses. The growing prevalence of health issues and chronic diseases such as cancer, neuropathy, and cardiovascular disease is expected to accelerate the growth of the mobile imaging services market in the US forecast period. Chronic disease is a long-term health problem, and there is no cure. These illnesses last for more than a year and require continuous treatment or otherwise limit activities in daily life. Mobile imaging saves medical professionals time because they don't have to be taken to the hospital for imaging. The surge in the prevalence of cardiovascular diseases is also expected to support market growth.

A LTAC facility is a fully functional acute care center that provides the same level of care for critically ill patients as in emergency rooms and acute care. Qualified care or rehabilitation facilities do not offer this type of care. The main goal of long-term care is to ensure smooth, continuous care, from low-intensity care to post-acute care, while maintaining the highest level of functional independence for the patient. A small proportion of people in need of care are young people with various intellectual and physical disabilities, but the majority of people receiving care are elderly. The surge in population growth will drive market growth during the forecast period. Long-term use of acute hospitals after serious illness is widespread and increasing.

Aftercare is a set of facilities that support the care of acute care hospitals after serious illness or injury. Post-acute care services are needed for no longer life-threatening patients but need quality care and service for rapid recovery. Such patients are typically placed in post-acute care facilities such as home care and hospice centers, qualified care facilities (SNF), inpatient rehabilitation facilities (IRF), and long-term acute hospitals (LTAC). Mobile imaging methods are used more frequently at these locations, and evaluations are done to improve the early and differential diagnosis of age-related or neurological defects. Mobile neuroimaging technology monitors the progression of neurological disorders and assesses and predicts the severity and progression of neurological disorders. The evaluation of therapeutic effects is done by therapeutic studies, clinical studies, and case reports, including pharmacological

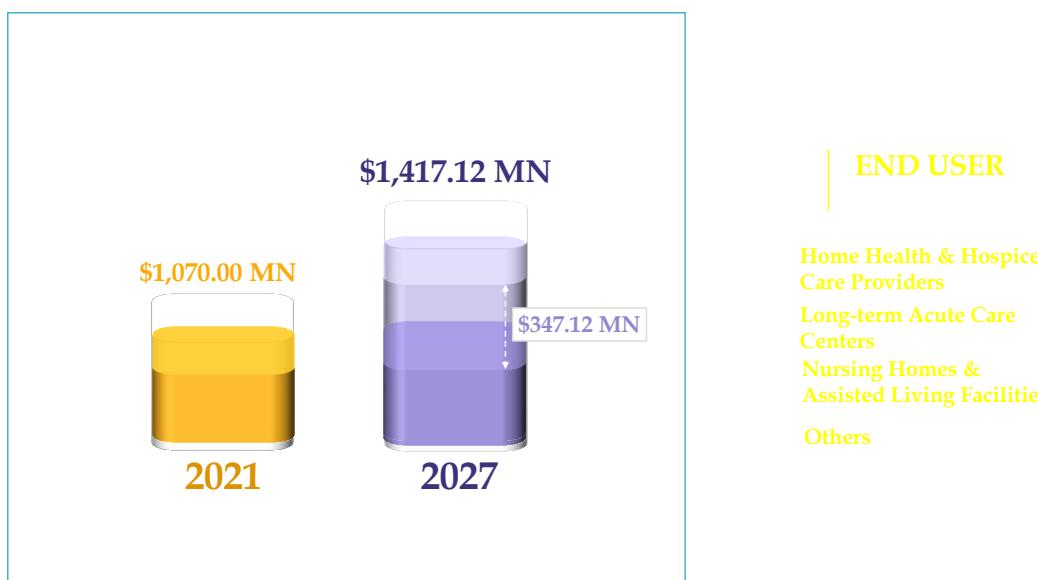
and non-pharmacological interventions, rehabilitation, and mobile neuroimaging. Functional neuroimaging and related neuroimaging techniques are becoming important tools in rehabilitation research. The functional brain imaging techniques are used to study the effects of brain damage or disease on cognitive capabilities and behavioral brain systems and the role of rehabilitative therapies in treating them.

Exhibit 40 Global Mobile Medical Imaging Services Market by End User: Incremental Growth



Source: Arizton

Exhibit 41 Global Mobile Medical Imaging Services Market by End User: Absolute Growth



Source: Arizton

13.3 NURSING HOMES & ASSISTED LIVING

13.3.1 Market Overview

Mobile imaging provides near-instant feedback and results with digital technology that displays images within seconds of capture. This leads to advanced care management and rapid patient care strategies. The process of moving older and vulnerable adults from nursing homes and long-term care hospitals to medical care can be a psychologically and physically stressful experience. Recent developments in modern mobile imaging help mitigate this fear by allowing evaluation in the care facility itself. Mobile imaging services can bring significant benefits to nursing homes and long-term care facilities by providing on-site diagnostic imaging that further reduces the risk of patient injury and discomfort. These services are available 24 hours a day and seven days a week even during holidays. No off-hours facilities are required for medical imaging services. Mobile services prevent the facility from dispatching its staff to transport residents needing medical imaging to a third party. Mobile imaging helps ensure the safety and comfort of nursing home residents while avoiding discomfort and anxiety. As the practice of using mobile imaging services increases, the image quality will improve further, and it will be easier to transport equipment that can provide immediate results using diagnostic radiation that is more coveted by diagnostic imaging professionals. The result is a technology with high acceptance rates in providers such as nursing homes and long-term care facilities. In addition, consumers are also helping to drive the transition to more advanced forms of imaging.

The latest advances in digital medical imaging systems help reduce patient anxiety by allowing evaluation in the care facility itself. Also, mobile imaging helps reduce hospital transfers, avoid waiting times, increase the number of tests performed, and improve access to timely diagnostics and treatments. The resources are used more efficiently and significantly reduce overall costs. Nursing home portable x-ray devices help avoid breast, skeletal, and abdominal x-ray hospitalizations, reduce hospitalizations and visits to emergency rooms and reduce overall medical costs. Nursing Home facilities require on-site technicians with sufficient training and qualifications to take images with mobile X-ray systems. The facility knows the preparation and execution of X-ray procedures and advanced X-rays.

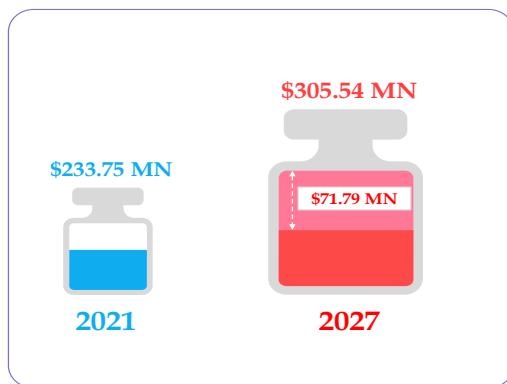
Nursing homes with care residents require specialized medical services such as radiology due to chronic and acute illnesses. Mobile X-rays and X-ray examinations performed in nursing homes are a great way to serve this population. Mobile X-ray services for nursing home residents are of the same quality as hospital-related examinations and have great potential benefits. According to BMC Health Services Research, the number of people living in nursing homes is expected to increase over the next 30 years. In 2017, residents of nursing homes lived with several chronic illnesses, with up to 80% having dementia. Nursing home residents often need to be transferred to a hospital or emergency room for radiation services. Rapid changes in the environment of nursing home residents, especially those with dementia, can affect their orientation and sense of security. Hospitalization of nursing home residents must be avoided as it exposes them to iatrogenic conditions and associated physical discomfort, psychological distress, functional disabilities, and high healthcare costs. Therefore, mobile x-ray services reduce the number of hospital or emergency room inpatients, outpatients, and tests and increase the examination in a nursing home facility. Mobile imaging is more cost-effective than hospital-based imaging and can inspect patients in nursing homes and long-term care facilities. Tremendous demand for care services and personnel such as emergency health care workers, nurses, nursing assistants, doctors, and trainees are expected to accelerate the growth of the mobile medical imaging services market.

Assisted living facilities typically provide 24-hour care services to protect residents, provide emergency response systems, and supervise people with cognitive impairment. Mobile health and radiology play important roles in this delicate situation. According to the National Institute on Aging (NIA), about 8.5% of the global population is aged above 65. The increasing prevalence of target diseases and advances in living support facilities are expected to stimulate the market over the forecast period, and rising rates of brain damage are expected to spur market growth. As aging individuals become more susceptible to chronic illnesses, the burden on the government and the health system will increase significantly. The surge in incidences of chronic diseases and the rise in demand for cost-effective medical care due to rising medical costs have contributed to technological advances in-home medical devices. Rising medical costs have led to higher patient preferences for home-based treatments. High growth potential, decentralized healthcare, and the development of miniaturized devices in emerging economies are some of the key factors expected to provide players in the market with significant growth opportunities. Due to rising medical costs, many patients with chronic respiratory illness prefer treatment in

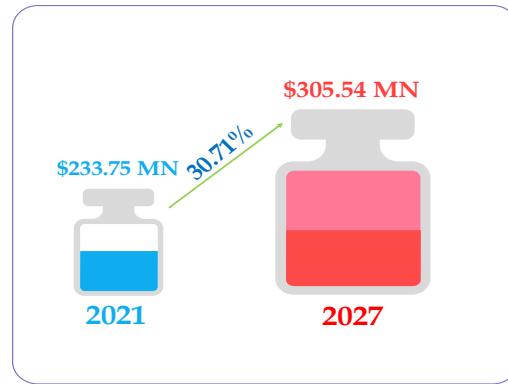
nursing homes. Thus, all these factors are expected to drive the growth of the segment during the forecast period.

*Exhibit 42 Global Mobile Medical Imaging Services Market By Nursing Home & Assisted Living:
Incremental & Absolute Growth*

INCREMENTAL GROWTH



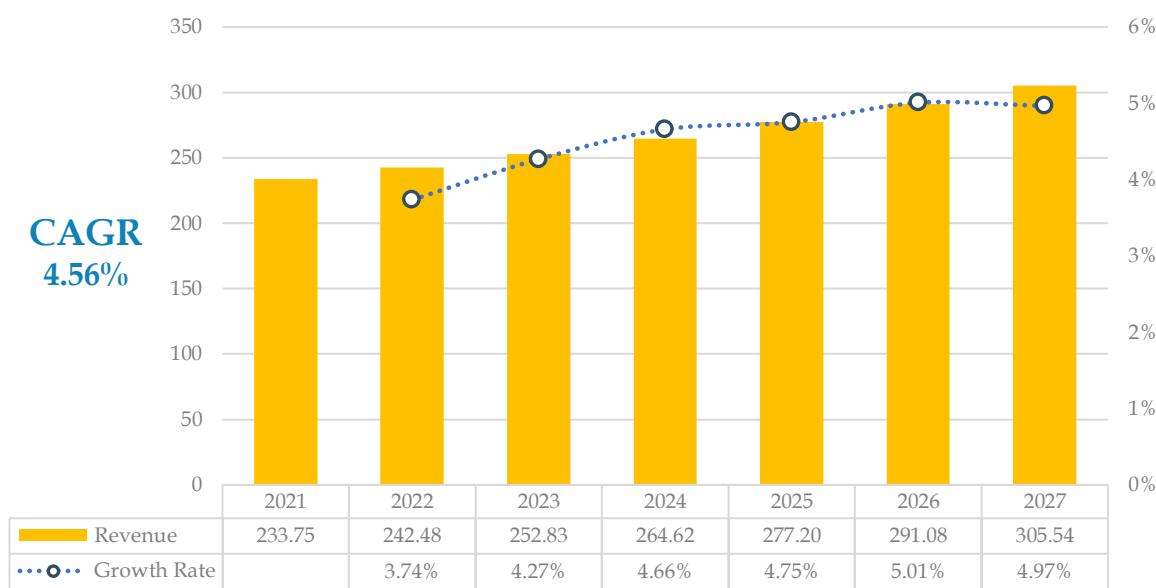
ABSOLUTE GROWTH



Source: Arizton

13.3.2 Market Size & Forecast

Exhibit 43 Global Mobile Medical Imaging Services Market by Assisted Living & Nursing Homes & 2021-2027 (\$ million)



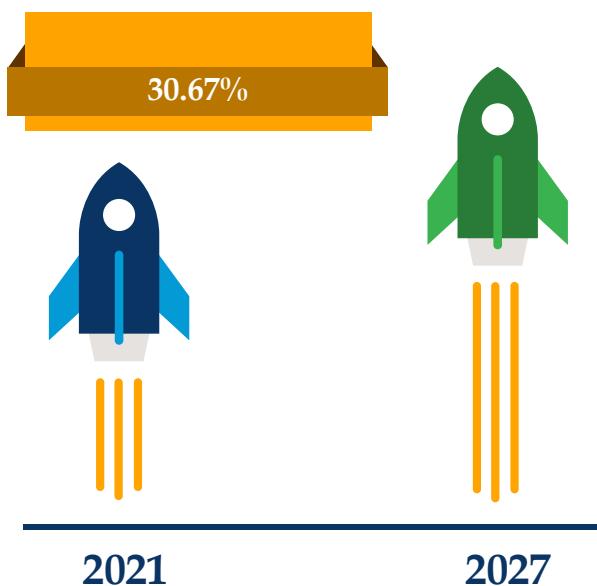
In 2021, the nursing homes and assisted living facilities segment of the market was valued at **\$233.75** million, which is expected to grow at a CAGR of **4.56%** to reach **\$305.54** million by 2027.

13.3.3 Nursing Home & Assisted Living: Market By Geography

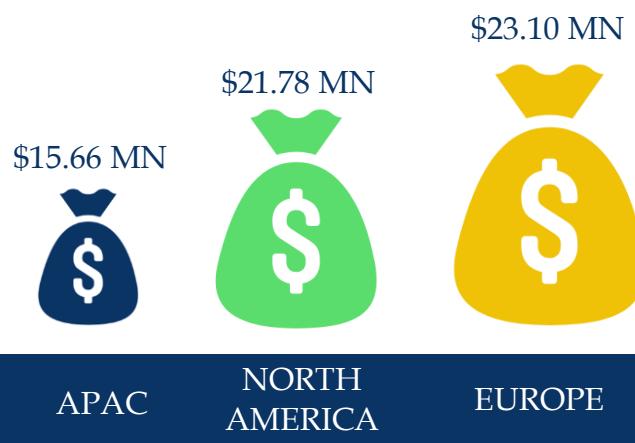
Exhibit 44 Global Mobile Medical Imaging Services Market by Nursing Home & Assisted Living Facilities 2021–2027 (\$ million) (Geography)

REGION	2021	2027	CAGR
NORTH AMERICA	\$71.33 MN	\$93.10 MN	4.54%
EUROPE	\$61.81 MN	\$84.91 MN	5.43%
APAC	\$47.94 MN	\$63.60 MN	4.83%
LATIN AMERICA	\$29.91 MN	\$34.98 MN	2.65%
MIDDLE EAST & AFRICA	\$22.92 MN	\$29.04 MN	4.02%

ABSOLUTE GROWTH



INCREMENTAL GROWTH TOP 3 CONTRIBUTORS



13.4 HOME HEALTH & HOSPICE CARE PROVIDERS

13.4.1 Market Overview

Home nursing and hospice care services are focused on monitoring, comforting, and ensuring the well-being of patients with short-lived and serious illnesses. Hospice care facilities provide patients with comprehensive care and support their families as well. Hospice care facilities treat critically ill patients. The home health and hospice care providers segment is one of the most fragmented healthcare segments with many independent players having large revenue shares in their respective regions. Mobile devices make it possible to provide imaging services to patients with limited space and budget. Mobile imaging services provide X-rays, EKG, and ultrasound services to healthcare facilities, families, and businesses. The high prevalence of chronic diseases such as cancer, neuropathy, and cardiovascular disease is expected to propel the growth of the market during the forecast period.

Chronic diseases are long-term health conditions that affect older adults and often have no permanent cure. These illnesses last for more than a year and require continuous treatment as they can limit Activities of Daily Living (ADLs). The deployment of mobile imaging solutions saves the time spent by medical professionals on conducting diagnostic medical examinations and improves their productivity. The surge in the prevalence of cardiovascular diseases is also expected to support market growth.

In addition, the rise in the incidence of cardiovascular diseases will propel technological advances as key market participants focus on product launches in emerging markets. Home care aims to treat an illness, wound, or illness and improve the patient's health. These services are more convenient, effective, and cheaper, and enable efficient treatment for chronic and serious illnesses, aging populations, and patients who require nutritional therapy. The home health and the hospice care segment is expected to witness considerable growth due to factors such as the rise in aging populations and the high prevalence of chronic diseases. Also, the reversal of global health care costs, the rise in the pace of urbanization, and government support for home health care and hospice care will drive the growth of these segments.

Furthermore, the rise in the adoption of imaging technologies used to detect and monitor disease progression will contribute to the surge in demand for mobile

medical imaging services. Technological advances in the market include a combination of computer science and advanced imaging technologies, which will enable remote data storage and allow healthcare professionals to track their medical history. Factors such as the surge in the acceptance of mobile medical imaging services in emerging countries and considerable advances in digital radiology will encourage new entrants to foray into the market in the coming years.

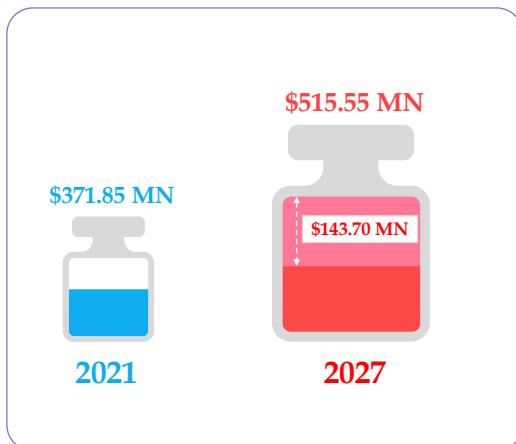
Home health and hospice care services provide the convenience and comfort of care to prevent unnecessary patient discomfort, travel, and care costs. Home nursing helps patients to recover from surgery, illness, or injury in the comfort of their homes. Mobile imaging health is also one of the most personal types of care provided at home.

Other factors such as the surge in the elderly population and the number of people diagnosed with chronic illness, high medical costs, and the rise in health consciousness are expected to drive the growth of the segment. Currently, the segment is witnessing greater growth than in recent years. Smart home healthcare technologies and surveillance systems based on the Internet of Things and other mobile health technologies have supported home diagnostics, treatment, and care and improved communication between patients, nursing staff, and their service providers. The evolution of the Internet of Things and its use in-home care processes has improved the quality of care and overall disease management and reduced treatment costs. Mobile imaging devices used in-home care settings can significantly reduce medical costs while improving the overall quality of service. The true value of mobile health lies in the latest technology that facilitates patient monitoring and engagement and enables mobile access to patient information. These mobile technologies enable the monitoring of patients from home and in inpatient settings.

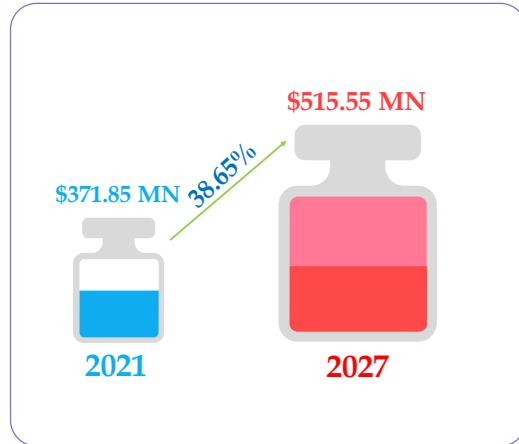
Mobile imaging is the perfect option for home care programs and hospice facilities in a market driven by hospital reimbursement pressure and integration. Mobile solutions allow hospice facilities or home care systems to provide patients with high-quality, inexpensive, and convenient imaging solutions for short- or long-term care. Mobile medical imaging services for home-based medical and hospice care depend on the environment. Mobile imaging is a fast and high-quality test for patients in a familiar facility and a comfortable and familiar environment, which also minimizes the hospitalization rates.

Exhibit 45 Global Mobile Medical Imaging Services Market By Home Health & Hospice: Incremental & Absolute Growth

INCREMENTAL GROWTH



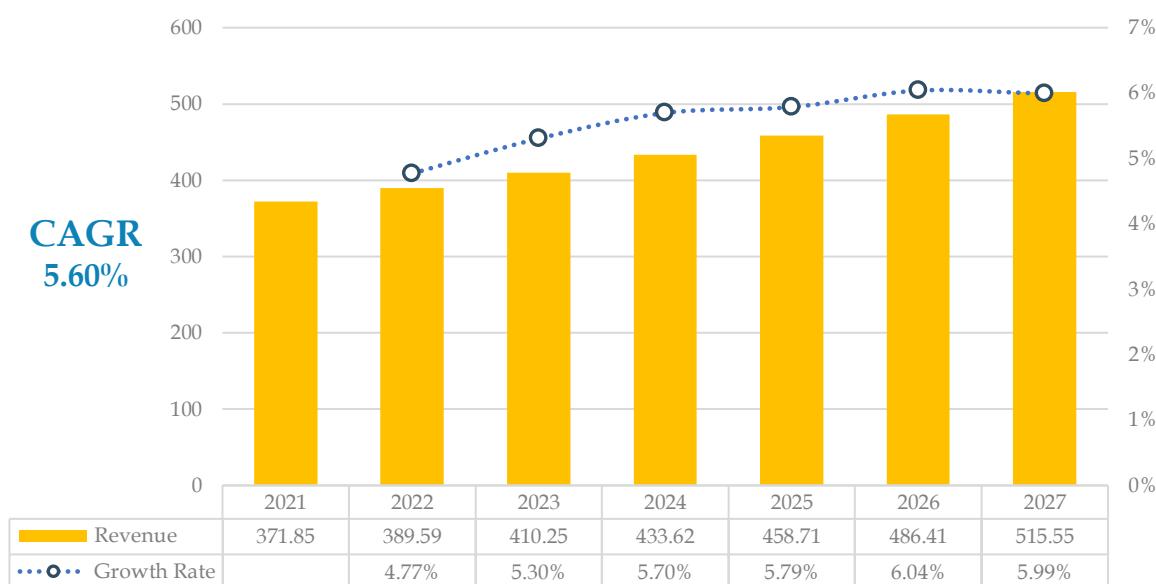
ABSOLUTE GROWTH



Source: Arizton

13.4.2 Market Size & Forecast

Exhibit 46 Global Mobile Medical Imaging Services Market by Home Health & Hospice 2021–2027 (\$ million)



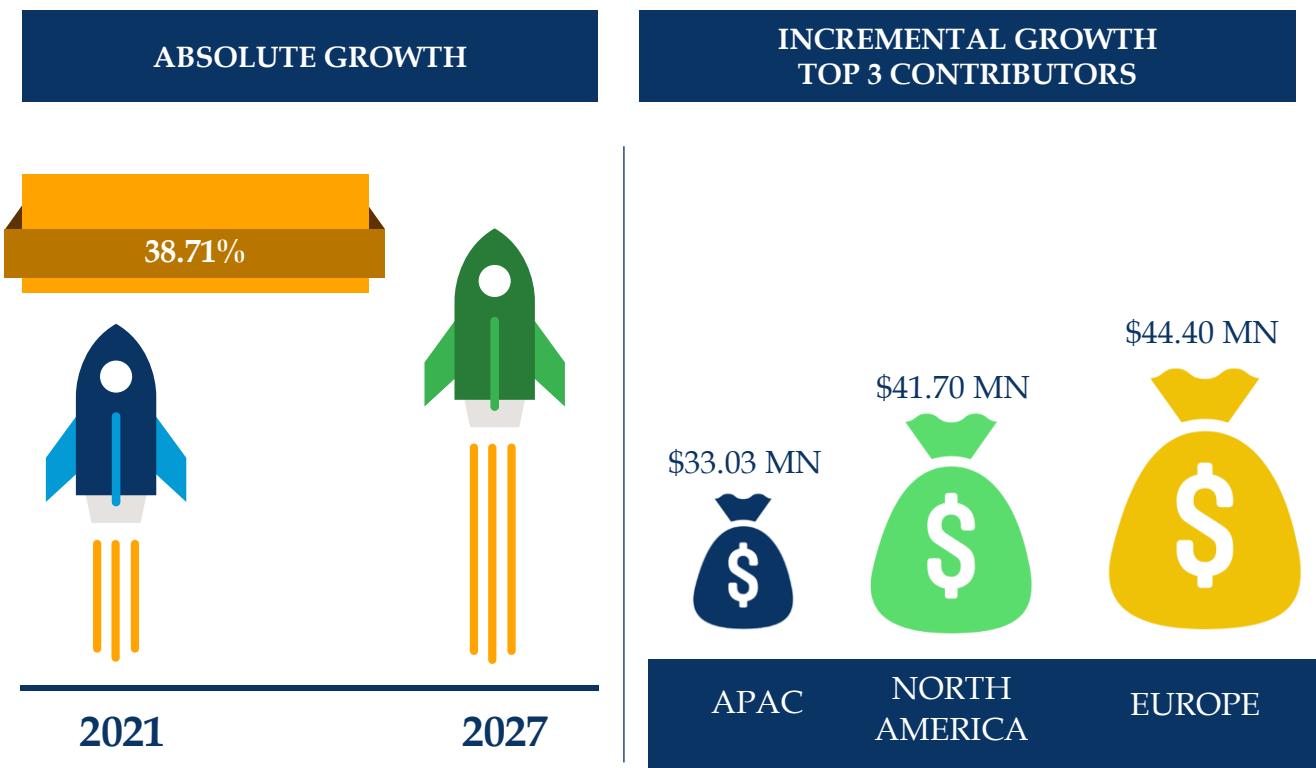
Source: Arizton

In 2021, the home health & hospice care providers segment of the market was valued at **\$371.85** million, which is expected to grow at a CAGR of **5.60%** to reach **\$515.55** million by 2027.

13.4.3 Home Health & Hospice: Market By Geography

Table 3 Global Mobile Medical Imaging Services Market by Home Health & Hospice 2021–2027 (\$ million) (Geography)

Region	2021	2027	CAGR
NORTH AMERICA	\$113.47 MN	\$155.17 MN	5.35%
EUROPE	\$97.26 MN	\$141.66 MN	6.47%
APAC	\$76.83 MN	\$109.86 MN	6.14%
LATIN AMERICA	\$47.15 MN	\$59.69 MN	4.01%
MIDDLE EAST & AFRICA	\$37.11 MN	\$49.38 MN	4.88%



13.5 LONG-TERM ACUTE CARE FACILITIES

13.5.1 Market Overview

Patients in rehabilitation hospitals or long-term acute wards require comfortable, sensitive, and comprehensive care. The medical mobile imaging services are available in long-term acute care centers. Factors such as the rapidly expanding aging population, technological advances in patient care, high demand for long-term care services, and the surge in the number of patients in the long-term acute phase are expected to drive the growth of the segment. Technological advances and the surge in demand for mobile imaging solutions in long-term acute care due to the rapid expansion of the aging population are expected to offer tremendous growth opportunities to players in the market. According to CDC's National Center for Health Statistics (NCHS), the number of long-term acute care centers in the US is increasing by an average of 5-10% annually since 1997. According to NCHS, the number of hospital admissions for long-term acute care increased from 13,732 to 40,353 every year, while the annual costs increased from \$484 million to \$ 1.325 billion between 1997 and 2006. Also, the average annual healthcare costs increased from around \$2 billion to \$2.5 billion between 2010 and 2015.

Chronic diseases are long-term health problems and often have no permanent cure. The increasing pervasiveness of chronic diseases such as cancer, neuropathy, and cardiovascular disease is expected to drive the growth of the mobile imaging services segment during the forecast period. These illnesses last for more than a year and require continuous treatment as they tend to limit the daily activities of patients. Medical mobile imaging services provide a patient-centric approach that extends the standard usage review and pre-approval process to coordinate the post-acute recovery process fully. Long-term acute care entails the provision of healthcare services to patients with serious medical conditions who require specialized and continuous treatment. Although the types of treatment offered by long-term acute care facilities vary, they often focus on severe trauma to the body.

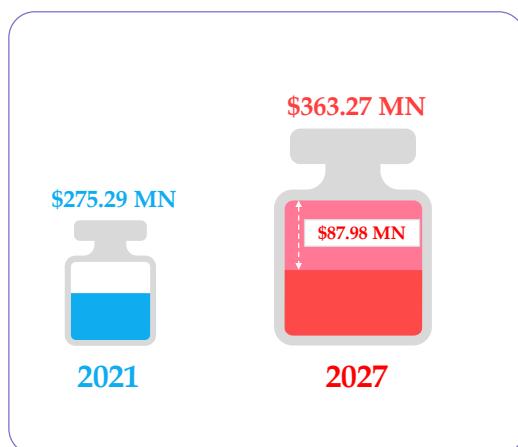
A long-term acute care (LTAC) facility is a fully functional acute care center that offers the same level of care to critically ill patients as in emergency rooms and acute care. Qualified care or rehabilitation facilities do not offer this type of care. The main goal of long-term care is to ensure smooth, continuous care, from low-intensity care

to post-acute care, while maintaining the highest level of functional independence of the patient. A small proportion of people in need of care are young people with various intellectual and physical disabilities. However, most people receiving long-term care belong to the older generations. This generational cohort will also drive the growth of the segment during the forecast period. The high prevalence of serious illnesses has resulted in a considerable surge in admissions to LTAC facilities.

Patients need post-acute care services after they discharge from hospitals after serious illness or injury. Post-acute care services are required by patients who get discharged from hospitals and require high-quality care and service for rapid recovery. Such patients are typically admitted to post-acute care facilities, such as home care and hospice centers, qualified care facilities (SNF), inpatient rehabilitation facilities (IRF), and LTACs. Mobile imaging technology enables fast and accurate on-site diagnostic services and transforms conventionally time-consuming and difficult processes into simple and fast processes with instant feedback from long-term acute care patients. Many new applications for mobile imaging, including cardiology, neurology, and gynecology are more used in LTAC facilities.

Exhibit 47 Global Mobile Medical Imaging Services Market by Long-term Acute Care Centers: Incremental & Absolute Growth

INCREMENTAL GROWTH



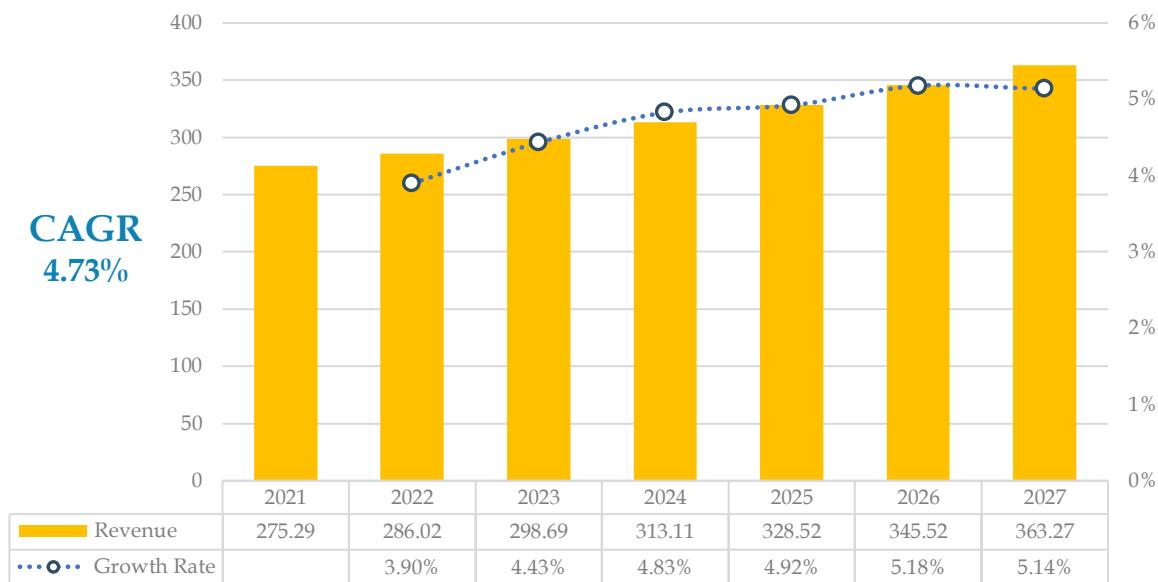
ABSOLUTE GROWTH



Source: Arizton

13.5.2 Market Size & Forecast

Exhibit 48 Global Mobile Medical Imaging Services Market by Long-term Acute Care Centers 2021–2027 (\$ million)



Source: Arizton

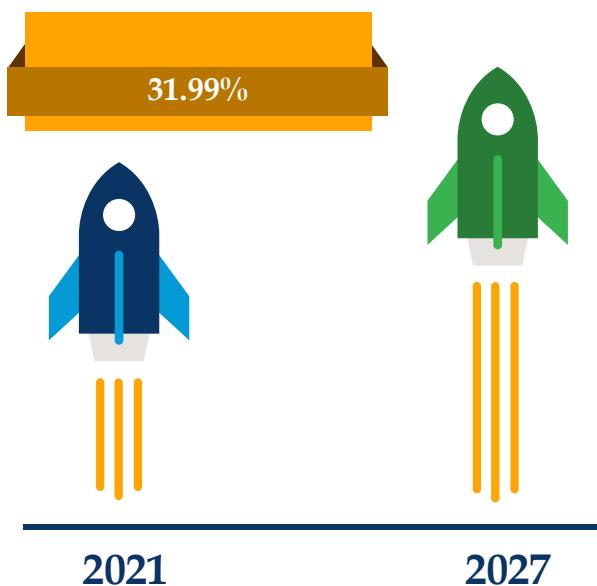
In 2021, the long-term acute care centers segment of the market was valued at **\$275.29** million, which is expected to grow at a CAGR of **4.73%** to reach **\$363.27** million by 2027.

13.5.3 Long-term Acute Care Centers: Market By Geography

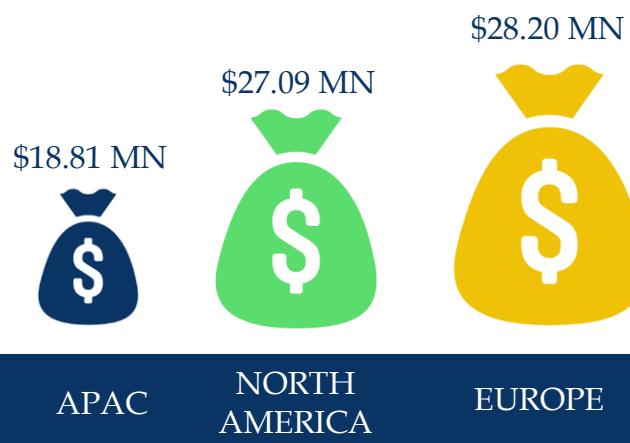
Exhibit 49 Global Mobile Medical Imaging Services Market by Long Term Acute Care Centers 2021–2027 (\$ million) (Geography)

REGION	2021	2027	CAGR
NORTH AMERICA	\$84.29 MN	\$111.39 MN	4.75%
EUROPE	\$72.59 MN	\$100.79 MN	5.62%
APAC	\$56.07 MN	\$74.88 MN	4.94%
LATIN AMERICA	\$34.78 MN	\$41.29 MN	2.90%
MIDDLE EAST & AFRICA	\$27.50 MN	\$34.93 MN	4.07%

ABSOLUTE GROWTH



INCREMENTAL GROWTH TOP 3 CONTRIBUTORS



13.6 OTHERS

13.6.1 Market Overview

Technological advances have contributed to the development of increasingly robust mobile imaging technologies, such as functional near-infrared spectroscopy (fNIRS) and Electroencephalography (EEG), which will enable the recording of brain activity during actual gait and balance work in various environments. The human brain controls gait and balance, which worsens with age and neuropathy. A better understanding of the patient's condition enables coordinated individual interventions to support a longer independent life. Many services use neurophysiological and mobile neuroimaging tools to provide mobile imaging in rehabilitation centers. Mobile medical imaging methods are used to perform evaluations and improve the early and differential diagnosis of age-related or neurological defects. Mobile neuroimaging technology monitors the progression of neurological disorders and assesses and predicts the severity and progression of neurological disorders. The evaluation of therapeutic effects is done by therapeutic studies, clinical studies, and case reports, including pharmacological and non-pharmacological interventions, rehabilitation, and mobile neuroimaging. Functional neuroimaging and related neuroimaging techniques are becoming important tools in rehabilitation research. The functional brain imaging techniques are performed to determine the effects of brain damage and disease on cognitive and behavioral brain systems. Thus, with the surge in the number of rehabilitation centers, the adoption of mobile imaging services is expected to increase, which will accelerate the segmental growth in the market.

The researchers continuously map the changes in neuroplasticity that support functional neuroimaging learning and memory for other brain injuries and illnesses in the rehabilitation centers during their recovery process. In such cases, shifting patients for radiological inventions may create a balance in the patient. Here is where the mobile imaging services come into action. Such factors are expected to promote the growth of the segment during the forecast period.

The emergency center is a convenient on-demand supply facility, similar to the walk-in retail clinics. However, instead of treating symptoms such as bronchitis and mild infections, there are emergency clinics to treat more serious symptoms such as

fractures, sprains, and wounds and services such as blood tests, sewing, and X-ray tests. According to the Emergency Medical Association (UCA), the total number of emergency centers in the US reached 8,774 in November 2018, increasing 8% compared to 8,125 in 2017. The benefits of the emergency center are that they find immediate and quick cures and analyses for health issues such as chronic pain instructions, pain management capabilities, etc. In panic conditions, reduced hospital readmissions, rapid booking appointments, and increased preference by healthcare facilities for patient-centric care are driving the market. It is the main driving force to accelerate the segment in the market. The demand for emergency medical care has propelled the growth of urgent care centers. The increasing prevalence of various illnesses such as trauma, stroke, cardiovascular disease, and Parkinson's disease and the increasing acceptance of emergency conditions for affordable advice and treatment services continue to drive the market. An emergency medical center provides patients with a professional, accurate and rapid interpretation of diagnostic images. Digital mobile devices help improve workflows and reduce the need for tedious processing. Saving time is the greatest benefit for patients, radiologists, and technicians.

Many such health centers such as physician offices, surgical centers, and behavioral health centers require mobile imaging services for better treatment services to enable the full recovery of patients affected by various conditions. Thus, the surge in the number of patients in such centers will promote the market during the forecast period.

Exhibit 50 Global Mobile Medical Imaging Services Market by Other End Users: Incremental & Absolute Growth

INCREMENTAL GROWTH



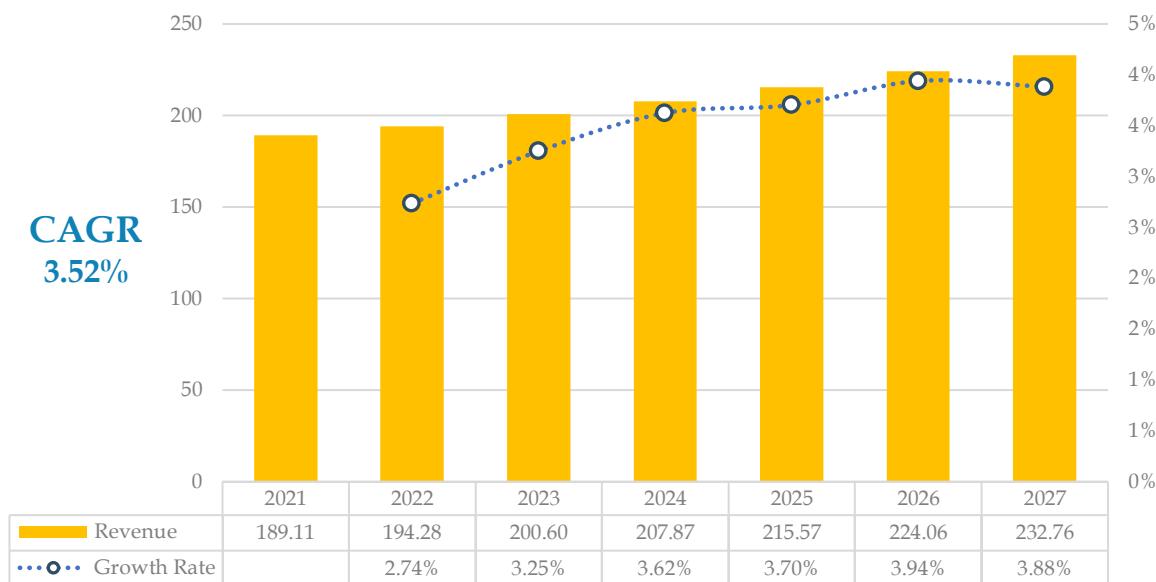
ABSOLUTE GROWTH



Source: Arizton

13.6.2 Market Size & Forecast

Exhibit 51 Global Mobile Medical Imaging Services Market by Other End Users 2021–2027 (\$ million)



Source: Arizton

In 2021, the other end-users segment of the market was valued at \$189.11 million, which is expected to grow at a CAGR of 3.52% to reach \$232.76 million by 2027.

13.6.3 Others: Market By Geography

Exhibit 52 Global Mobile Medical Imaging Services Market by Other End Users 2021–2027 (\$ million) (Geography)

REGION	2021	2027	CAGR
NORTH AMERICA	\$55.12 MN	\$65.47 MN	2.91%
EUROPE	\$51.89 MN	\$69.44 MN	4.98%
APAC	\$33.17 MN	\$40.76 MN	3.49%
LATIN AMERICA	\$27.26 MN	\$29.84 MN	1.52%
MIDDLE EAST & AFRICA	\$21.61 MN	\$26.94 MN	3.74%

ABSOLUTE GROWTH

INCREMENTAL GROWTH TOP 3 CONTRIBUTORS

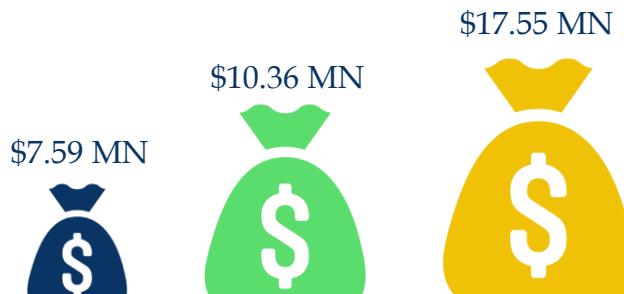
22.96%



2021



2027





GEOGRAPHIC SEGMENTATION

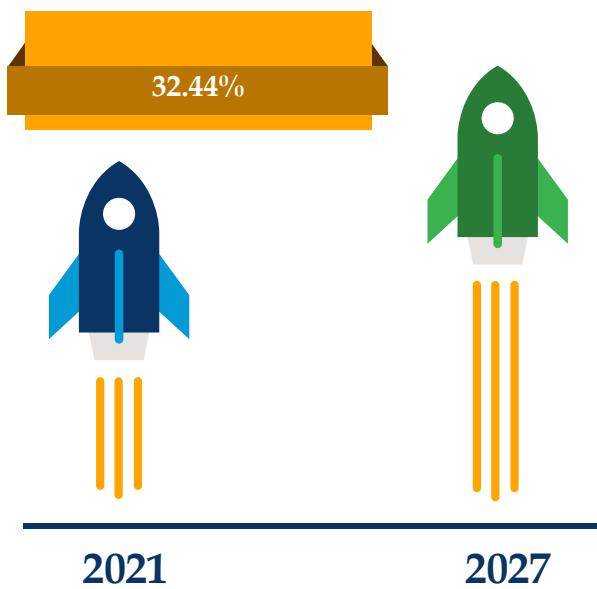
14 GEOGRAPHY

14.1 MARKET SNAPSHOT & GROWTH ENGINE

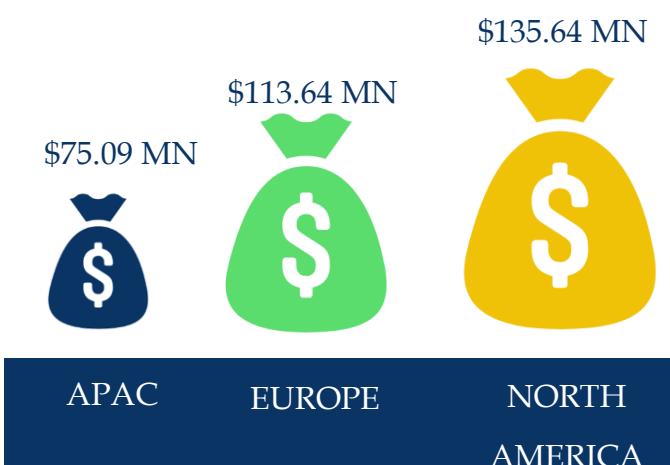
Exhibit 53 Incremental Growth by Geography 2021 & 2027

REGION	2021	2027	CAGR
NORTH AMERICA	\$431.21 MN	\$566.85 MN	4.66%
EUROPE	\$283.55 MN	\$396.79 MN	5.76%
APAC	\$214.00 MN	\$289.09 MN	5.14%
LATIN AMERICA	\$85.60 MN	\$100.62 MN	2.73%
MIDDLE EAST & AFRICA	\$55.64 MN	\$63.77 MN	2.30%

ABSOLUTE GROWTH



INCREMENTAL GROWTH TOP 3 CONTRIBUTORS



14.2 GEOGRAPHIC OVERVIEW

Exhibit 54 Global Mobile Medical Imaging Services Market By Geography

Global Mobile Medical Imaging Services Market by Geography

North America

Europe

APAC

Latin America

Middle East & Africa

Cancers are one of the country's leading causes of death in North America as they account for one in four deaths. According to estimates, breast cancer is one of the most common types of cancer diagnosed in the US. Thus, the increase in the incidence of cancer and other chronic diseases will impact the demand for mobile medical imaging services and complement the growth of the US mobile imaging services market during the forecast period. The governments across the North American region play a vital role in supporting market growth. In 2020 about 1,806,590 new cancer cases were diagnosed in the US, while 606,520 succumbed to the disease. In 2019, there were about 16.9 million cancer survivors in the US. The number of cancer survivors in the country is expected to increase to 22.2 million by 2030. The national spending on cancer treatment in the US was estimated at \$150.8 billion in 2018. The cost of treatment in the region has increased with the surge in the aging population and the rise in the number of cancer survivors. Healthcare costs in the region may increase with the surge in the adoption of more expensive treatments as the standard of care. The increase in chronic illness in the region is attributable to an increase in the life expectancy of individuals and unhealthy dietary habits. In the early 2000s, the demand for mobile medical imaging options witnessed a surge due to the shift toward home-based healthcare practices and technological advances. Therefore, many medical professionals use mobile medical imaging equipment as a part of their imaging services to control the burden of increasing illnesses and provide timely treatment.

According to the Government of Canada, in 2014, more than 6 million Canadians were aged 65 or above and accounted for 15.6 % of the total Canadian population. By

2030, the number of elderly individuals will exceed 9.5 million and account for 23% of the Canadian population. The Canadian healthcare system is focused on improving the efficiency of its medical imaging services for better patient outcomes and quality of care. Medical device companies that introduce innovative devices in the Canadian market will reap tremendous benefits due to the rapid development of the market in imaging technology. Expensive procedures and equipment, side effects of diagnostic imaging, and saturation in the developed area are major challenges for providers of mobile imaging devices and services.

Several government initiatives are being implemented in Europe to develop radiology and mobile imaging services in the region. For instance, WONCA European collaborative paper by the European Radiology Society underscores the need for collaboration between clinical radiology and general practitioners with the primary goal of improving patient care in Europe. The introduction of mobile imaging services in Europe has increased significantly in the past few years. The growing elderly population and the increasing prevalence of chronic diseases are major growth drivers for the regional market. As a leader in the international medical technology community, Germany is actively involved in developing and advancing medical imaging methods such as CT, MRI, mammography, and ultrasound. Therefore, these factors will stimulate the growth of the European market during the forecast period.

The wearable imaging technology in healthcare has emerged as a crucial development in India and all other countries across APAC due to the rise in the health-conscious population. The surge in demand for mobile imaging services in APAC is attributable to the lack of basic healthcare infrastructure, which has caused major health concerns. Also, the rise in demand for mobile imaging services is due to the increase in the number of patients and the cost of medical care. According to the World Heart Federation, non-communicable diseases, including cardiovascular disease, are expected to cause a significant number of deaths in the region, which will propel the demand for mobile imaging services. The high demand for ultrasonic systems due to the increase in consumer disposable income contributes to the growth of the market under investigation. The surge in the prevalence of chronic diseases, such as cancer has increased the demand for mobile imaging services in the region. Japan is expected to be the world's leading country to introduce technologically

advanced products due to its advanced medical infrastructure. In addition, Japan has become a center of R&D initiatives due to the existence of many healthcare companies.

During the COVID-19 pandemic, most Latin American healthcare providers faced a new challenge of providing medical images to their patients. Another major challenge is the introduction of new digital technologies to support telemedicine, especially among elderly individuals who have a lot of experience in using analog image processing solutions. According to the United Nations Ministry of Economic and Social Affairs, in 2019, Brazil's population aged above 60 was recorded at about 19,526. The number is estimated to reach 30,413 by 2030. The aging process is often associated with an increased risk of chronic disease and the development of bone and muscle weakness. The companies in Latin America are intended to positively impact health in urban and remote areas. However, specific and strict controls have been introduced across Latin America to import used medical diagnostic equipment. Many companies are investing in marketing strategies to drive the adoption of mobile imaging solutions across the country. Several development initiatives across the region have propelled the demand for these technologies, which is expected to drive the growth of the Brazilian mobile imaging services market during the forecast period.

The high prevalence of non-communicable diseases such as heart disease, diabetes, cancer, and other chronic diseases have fueled the demand for mobile imaging services. Such reasons motivate the growth of the mobile imaging services market throughout Saudi Arabia. For example, the UAE is one of the region's major markets due to its technologically advanced resources and surge in awareness of the importance of imaging in treatment. Over the years, the national health sector has undergone a major revolution, with the surge in the number of private and public hospitals. According to the Annals of Oncology, the proportion of the population aged 65 and above in the Middle East and North Africa is estimated to be 4.7% of the total population of 336 million. Also, the rise in demand for mobile imaging solutions for early detection of illness and receiving timely treatment will drive market growth. The elderly population in the region is prone to various infectious and non-communicable diseases, and therefore, requires regular diagnosis to receive treatment, which will propel the demand for mobile diagnostic imaging services. In

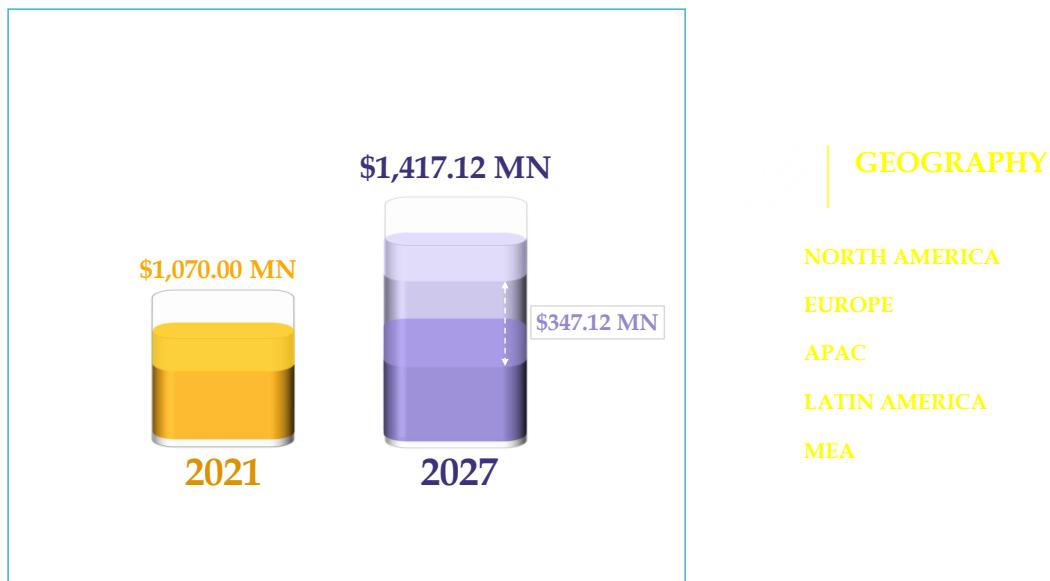
In addition, the rise in the health-conscious population across the country, which is more focused on disease prevention, is expected to continue to support market growth.

Exhibit 55 Global Medical Imaging Services Market by Country 2021 (\$ million)



Source: Arizton

Exhibit 56 Global Mobile Medical Imaging Services Market by Region: Incremental Growth



Source: Arizton

Exhibit 57 Global Mobile Medical Imaging Services Market by Region: Absolute Growth

**GEOGRAPHY**

EUROPE

APAC

NORTH AMERICA

LATIN AMERICA

MEA

Source: Arizton



NORTH AMERICA

15 NORTH AMERICA

15.1 MARKET OVERVIEW

The adoption rate of mobile medical imaging services in North America is relatively faster than in other regions. Factors such as the exponential rise in patient monitoring and telemedicine services in the healthcare sector are expected to drive market growth. The enactment of US government regulations on using X-ray systems has enabled new growth opportunities for vendors in the North American mobile medical imaging services market. The considerable surge in the prevalence of cancer in the US has emerged as one of the leading causes of death in the country, accounting for a quarter of all deaths. Therefore, the surge in the prevalence of cancer and other chronic diseases and the use of mobile imaging services are expected to complement the growth of the US mobile imaging services market during the forecast period.

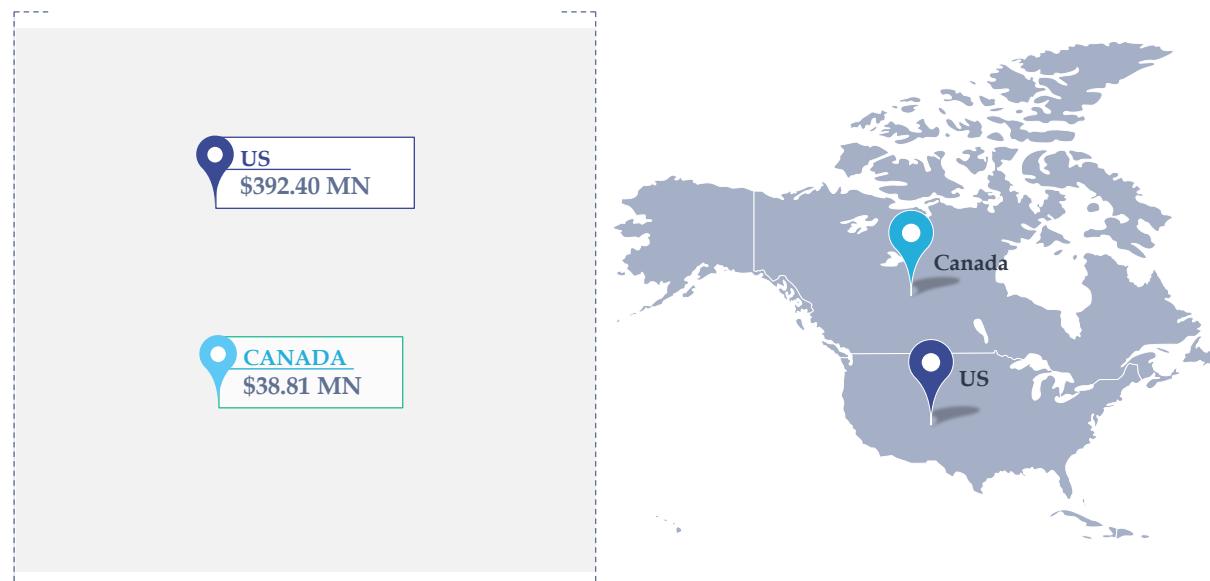
Several governments play an important role in supporting market growth. For example, the Research and Education (R&E) Foundation Board of the North American Radiological Society (RSNA) has approved more than \$3 million in radiation research and education grants this year and achieved a 30% funding rate for grant applications. Therefore, all these factors have contributed to the growth of the regional market. Many major players are focused on the launch of mobile imaging devices. For example, on November 19, 2021, Carestream Health announced a breakthrough in mobile medical imaging using the Ziehm Vision RFD Arm and the DRX Revolution mobile X-ray system at the Radiological Society of North America (RSNA) meeting in Chicago. These innovations are accelerating market development in the region. The demand for point-of-care diagnostics has contributed to the invention of portable x-ray machines. Mobile imaging devices play an instrumental role in cases that require immediate and quick treatment. Mobile medical imaging devices can be transported easily and require minimal space. Also, these devices can be connected to a computer and radiologists can view diagnostic images directly on the monitor.

Mobile imaging devices reduce imaging costs by eliminating paper copies such as X-ray films. Also, mobile medical images can be sent to the doctor electronically. The surge in demand for a hybrid mix of different imaging technologies and platform-independent imaging is another growth driver for the US market. However, the

surge in demand for effective medical imaging devices is attributable to the rise in the prevalence of chronic diseases such as cancer. According to the American Cancer Society, cancer is one of the leading causes of death in the US. Therefore, it is estimated that the increase in chronic disease patients and the above factors will promote the development of mobile video services in the coming years. Several government initiatives are driving the Canadian market. For example, the government had previously launched programs to reduce waiting times for medical services. In this way, government support can spur the mobile imaging market in Canada's growth path. Mobile medical imaging technology is constantly changing the medical environment.

Mobile medical imaging solutions are becoming increasingly important in an aging society, increasing diseases, decreasing medical costs, and a shortage of doctors. This is especially because most installed bases are already digitized, and image archiving and data exchange systems (PACS) are commonly deployed and used. American Cancer Society estimated in 2018, approximately 1,735,350 new cancers were diagnosed, and 609,640 cancer deaths were reported in the US. The rise in the prevalence of cancer in the US has accelerated the demand for better diagnostics and directly stimulated the growth of the overall market.

Exhibit 58 North America Mobile Medical Imaging Services Market: Key Countries (\$million)



Source: Arizton

Exhibit 59 North America Mobile Medical Imaging Services Market: Incremental & Absolute Growth

INCREMENTAL GROWTH



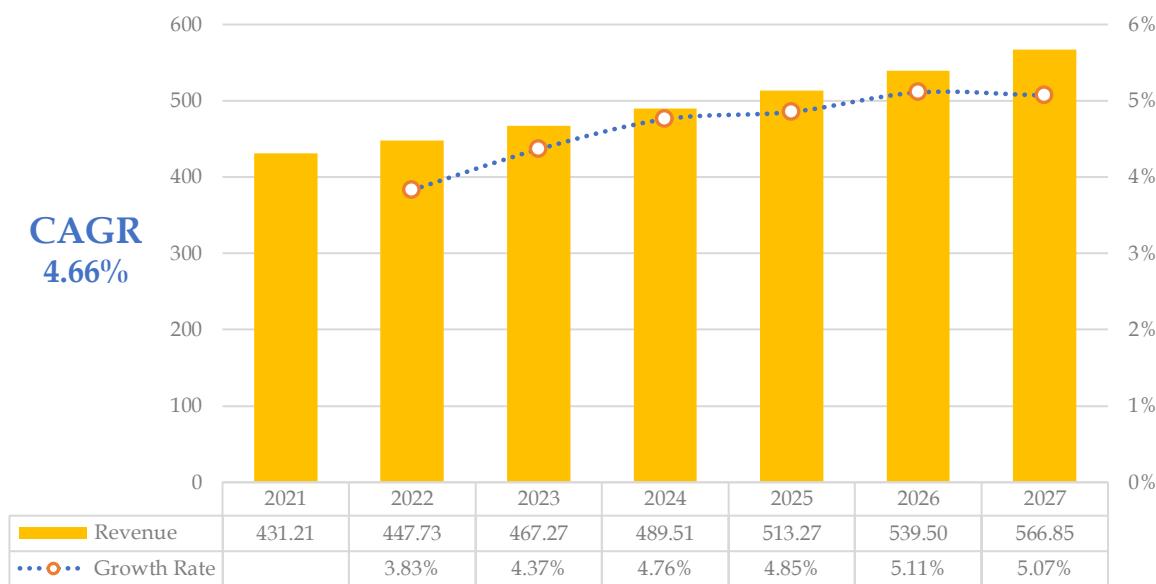
ABSOLUTE GROWTH



Source: Arizton

15.2 MARKET SIZE & FORECAST

Exhibit 60 North America Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

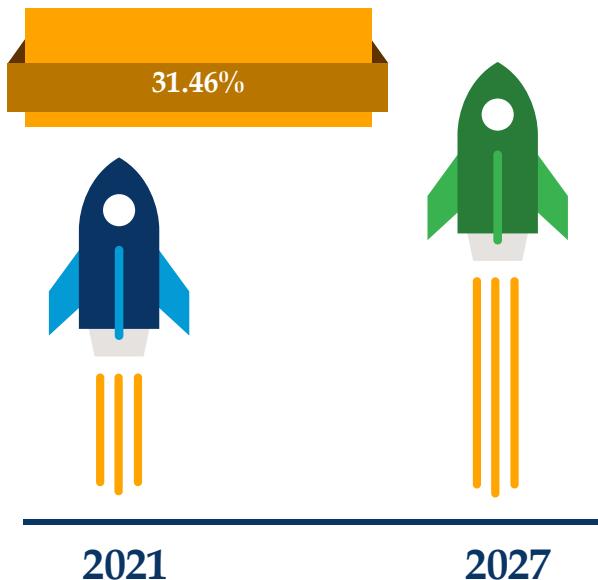
In 2021, the North American mobile medical imaging services market was valued at **\$431.21** million, which is expected to grow at a CAGR of **4.66%** to reach **\$566.85** million by 2027.

15.3 NORTH AMERICA: SERVICE TYPE SEGMENTATION

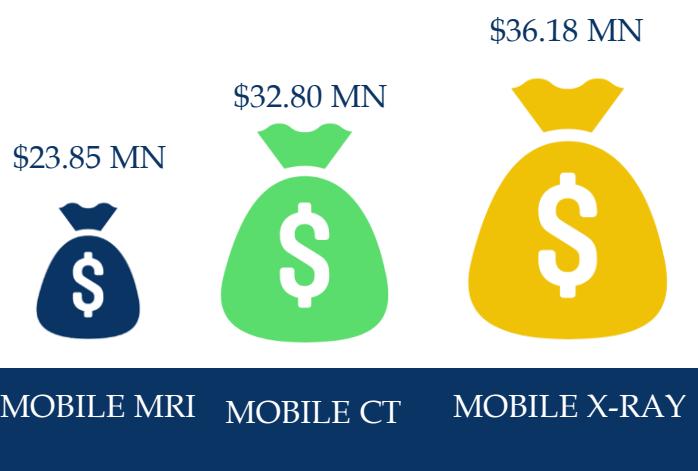
Exhibit 61 Incremental Growth By Service Type 2021 & 2027

Service Type	2021	2027	CAGR
MOBILE X-RAY	\$107.80 MN	\$143.98 MN	4.94%
MOBILE CT	\$86.24 MN	\$119.04 MN	5.52%
MOBILE ULTRASOUND	\$77.62 MN	\$101.47 MN	4.57%
MOBILE MRI	\$51.75 MN	\$79.36 MN	7.39%
MOBILE EKG	\$43.12 MN	\$51.02 MN	2.84%
OTHERS	\$64.68 MN	\$71.99 MN	1.80%

ABSOLUTE GROWTH



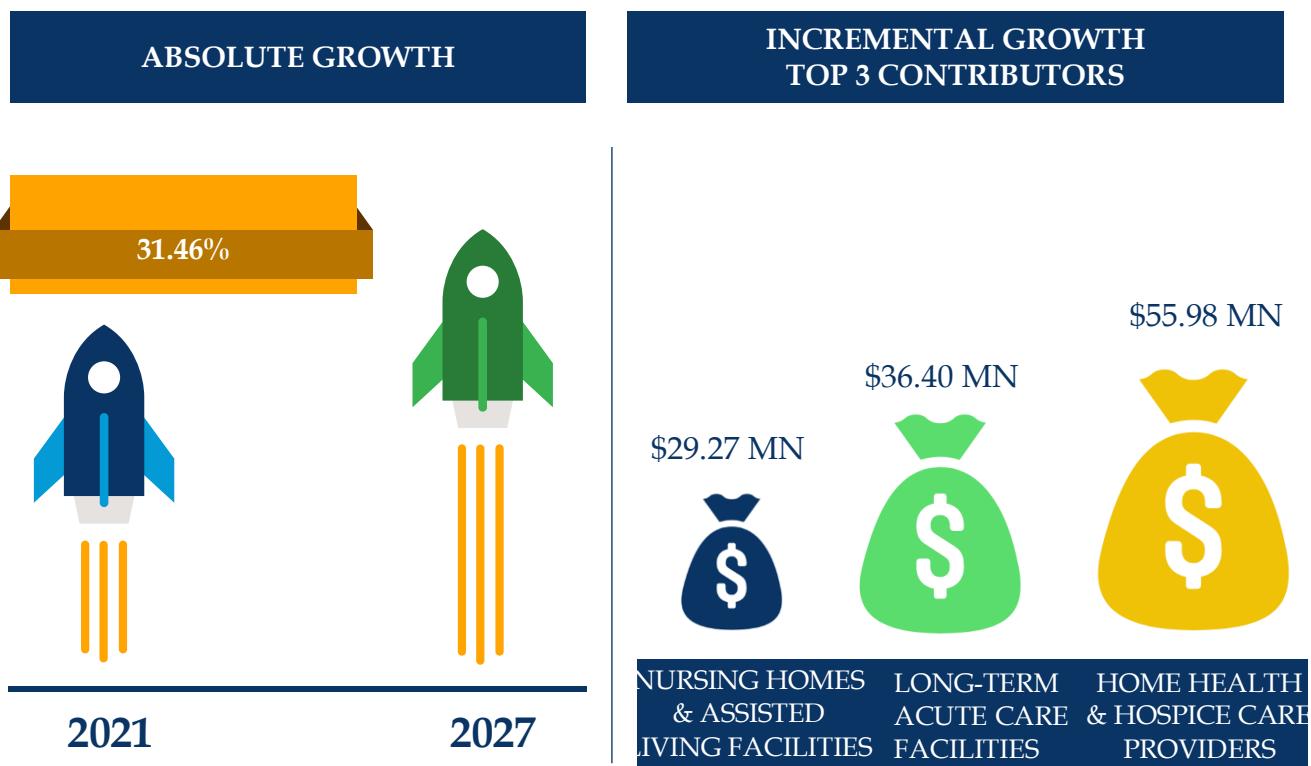
INCREMENTAL GROWTH TOP 3 CONTRIBUTORS



15.4 NORTH AMERICA: END-USER SEGMENTATION

Exhibit 62 Incremental Growth by End User 2021 & 2027

END USER	2021	2027	CAGR
NURSING HOMES & ASSISTED LIVING FACILITIES	\$94.87 MN	\$124.14 MN	4.58%
HOME HEALTH & HOSPICE CARE PROVIDERS	\$150.90 MN	\$206.90 MN	5.40%
LONG-TERM ACUTE CARE FACILITIES	\$112.11 MN	\$148.51 MN	4.80%
OTHERS	\$73.31 MN	\$87.29 MN	2.95%



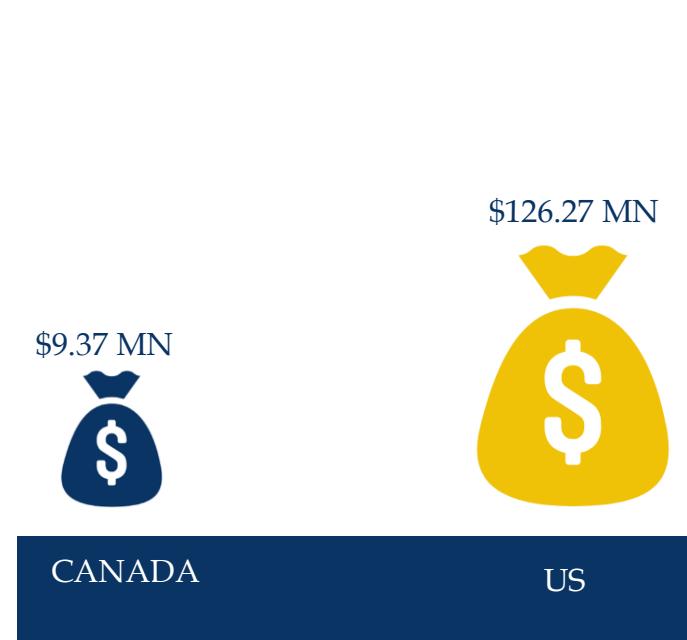
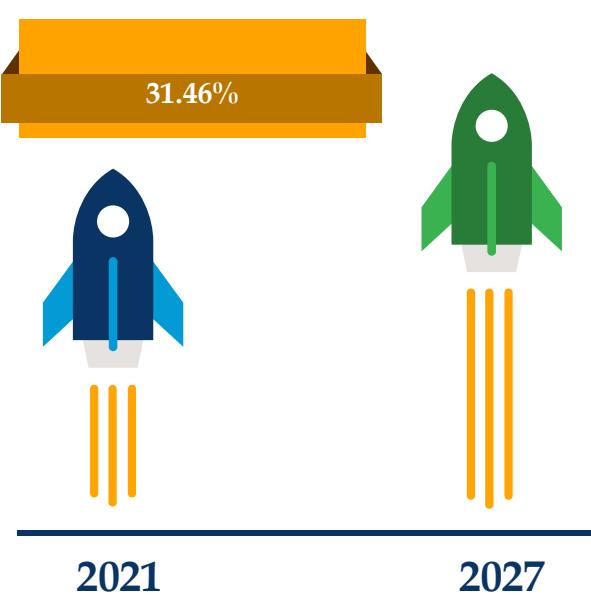
15.5 NORTH AMERICA: KEY COUNTRIES

Exhibit 63 Incremental Growth in North America by Key Countries 2021 & 2027

COUNTRY	2021	2027	CAGR
US	\$392.40 MN	\$518.67 MN	4.76%
CANADA	\$38.81 MN	\$48.18 MN	3.67%

ABSOLUTE GROWTH

INCREMENTAL GROWTH



15.5.1 US: Market Size & Forecast

In 2021, the US accounted for a revenue share of 91% in the North American mobile medical imaging services market. Chronic diseases are having a profound impact on American society and populations worldwide. The rise in the incidence of chronic diseases such as cancer in the US is the driving factor for the mobile imaging service market. According to National Cancer Institute, in 2020, about 1,806,590 new cancer cases were reported in the US, along with 606,520 deaths due to the disease. In 2019, the number of cancer survivors in the country was recorded at 16.9 million, which is expected to increase to 22.2 million by 2030.

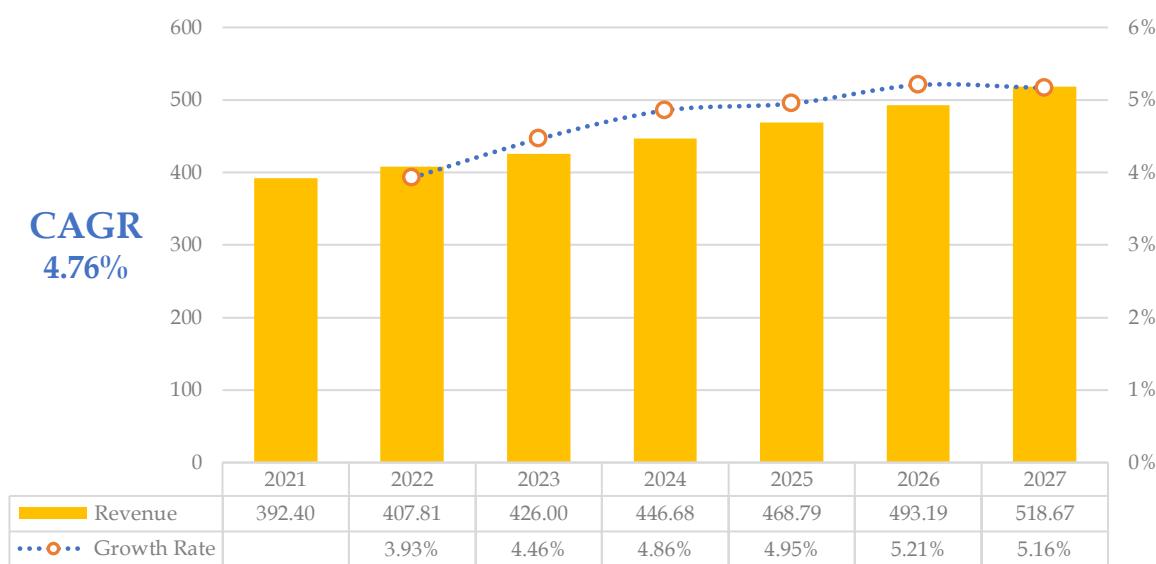
In 2018, the national spending on cancer treatment in the US was estimated to be \$150.8 billion. The increase in chronic illnesses across the country is due to the increase in life expectancy and poor dietary habits. In the early 2000s, the demand for mobile diagnostic imaging options increased due to mobile routes and technological advances. Medical professionals in the country rely on preoperative MRI and CT scans for diagnostic imaging services to visualize and identify the edges of tumors during treatment. The availability of multiple diagnostic imaging methods in a single facility and the redemption policy for diagnostic imaging procedures are expected to impact the growth of the entire market. The US Congress and the Medicare & Medicaid Service Center (CMS) have passed guidelines for advanced diagnostic imaging services such as CT, MRI, PET/CT, and nuclear surgery. Medicare covers imaging services through various payment systems, including Outpatient Payment Systems (HOPPS), Physician Fee Schedules (PFS), and Inpatient Expected Payment Systems.

Some major players in the market offer mobile diagnostic imaging devices, which is attributable to the key benefits of mobile imaging devices, such as improved access to healthcare and quick response times. Consequently, several vendors have introduced advanced versions of mobile imaging devices and services to the market. For example, Carestream Health Inc provides medical imaging systems and IT solutions for the medical field. According to the National Institutes of Health, patients aged above 65 are twice as likely to receive diagnostic imaging as the younger population. More women in the country undergo diagnostic imaging than their male counterparts. The high proportion of the elderly population in the US with

cheap insurance coverage can drive the market. The US is expected to witness a considerable surge in the aging population compared to other developed countries. The rise in the aging population across the country will propel the demand for mobile diagnostic imaging services as elderly individuals are more susceptible to chronic diseases. According to the American Cancer Society estimates, in 2018, 1,735,350 new cancer cases were reported in the US, along with 609,640 cancer deaths. The rise in the number of cancers is expected to offer tremendous growth opportunities to key vendors in the US mobile medical imaging services market.

The adoption of imaging services in the US has gradually increased in the US, which has improved the early diagnosis of disease and the availability of treatment options. Furthermore, the surge in the adoption of non-invasive and cost-effective procedures is expected to drive market growth. Mobile medical imaging services take less time than other invasive procedures and therefore, play a prominent role in reducing the duration of hospital stays and associated costs. Various technologies are being developed to improve mobile medical imaging devices and enhance the quality of diagnostic images. The enhanced sharpness of diagnostic images plays an instrumental role in diagnosing the disease early and improving treatment outcomes. The unprecedented surge in the number of service providers offering mobile medical imaging services in the US and the considerable increase in the installation of advanced imaging equipment in their facilities will propel the market growth during the forecast period.

Exhibit 64 US Mobile Medical Imaging Services Market 2021–2027 (\$ million)



In 2021, the US mobile medical imaging services market was valued at **\$392.40** million, which is expected to grow at a CAGR of **4.76%** to reach **\$518.67** million by 2027.

15.5.2 Canada: Market Size & Forecast

In 2021, Canada accounted for a revenue share of 9% in the North American mobile medical imaging services market. According to Chronic Disease Statistics in Canada, strokes are the leading cause of disability and the third leading cause of mortality in Canada. Almost one-third of women in the country succumb to strokes compared to their male counterparts. Also, women account for nearly 59% of deaths associated with strokes while men account for 41% of cases in the country. According to the Canadian Medical Association Journal, the differences in classification systems used to identify chronic diseases, including disease selection and variations in the study population have contributed to the prevalence ranging from 10% to 25%. Factors such as the rising prevalence of chronic diseases, expanding aging population, and the increasing adoption of advanced techniques in medical imaging are expected to positively influence the market. Also, the surge in the elderly population across the country will result in a significant increase in patients affected by chronic diseases.

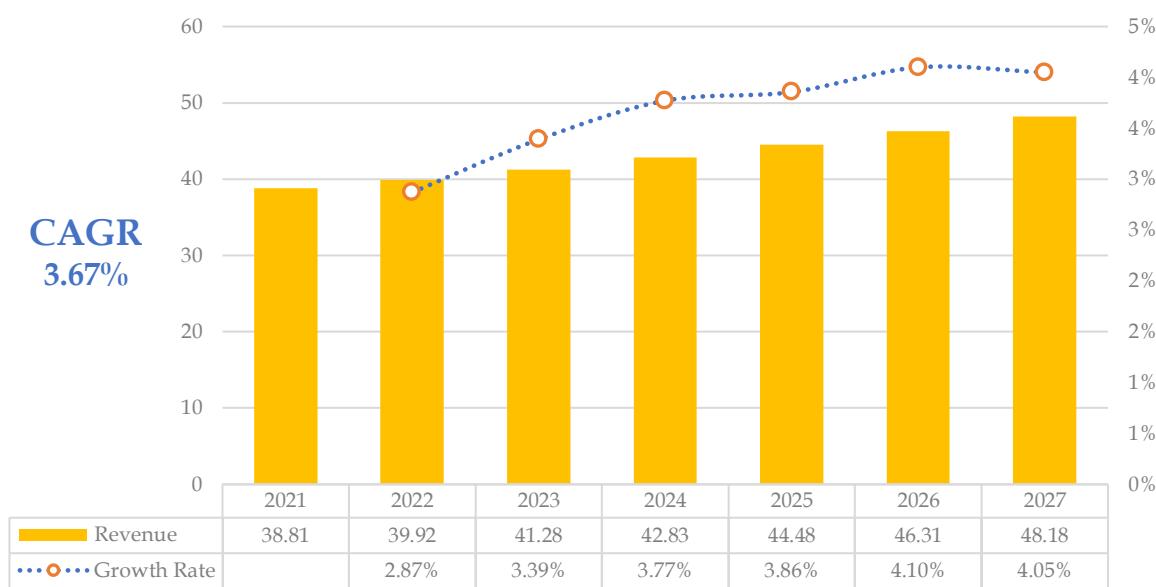
According to the Government of Canada, in 2014, more than 6 million individuals in Canada were aged 65 or older and accounted for 15.6 % of the country's population. By 2030, the number of older people will exceed 9.5 million, accounting for 23% of Canadians. Additionally, life expectancy for women will increase from the current 84.2 to 86.2 years by 2036, while life expectancy for men will now increase from 80 to 82.9 years. According to Canada's population data for 2019, 17% of the population or 6.5 million individuals in the country are aged above 65. By comparison, children (14+) make up 16% of the population, and this number is declining steadily. Therefore, as the elderly population continues to expand rapidly, the demand for mobile imaging devices and services is expected to increase. Many people in the country are affected by multiple sclerosis, stroke, dementia, and infectious diseases, which is also expected to propel the demand for mobile imaging systems and services.

Canada's healthcare system believes it is important to realize the value of patient care with the ability of medical imaging to improve patient outcomes due to improved efficiency and quality of care. Interventional radiology (IR) enables complex surgical interventions and is less invasive than other procedures such as cancer biopsy, and is more effective with guided imaging. Last 20 years, this sub-specialty has expanded

to treat various illnesses as it affects all organs in the body. For instance, IR has been used to treat acute ischemic stroke, which plays an important role in ensuring treatment efficiency due to rapid and safe recovery of blood flow. For instance, the blood vessel treatment for lower extremities and peripheral artery obstructive disease costs an average of \$6,000 per patient. Compared to a conventional surgical bypass procedure, intravascular aortic repair saves an average of \$ 9,900 per rupture.

The rapid development in imaging technology has enabled several medical device companies to develop and launch new and innovative devices in the market and reap greater profits. Expensive procedures and equipment, side effects of diagnostic imaging, and saturation in the developed area are major challenges for mobile imaging devices and services. New trends that directly impact the dynamics of the diagnostic imaging industry include the surge in the use of technologically advanced diagnostic imaging systems and the development of portable diagnostic imaging systems to improve diagnostic procedures and process accurate images.

Exhibit 65 Canada Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Canadian mobile medical imaging services market was valued at **\$38.81** million, which is expected to grow at a CAGR of **3.67%** to reach **\$48.18** million by 2027.



EUROPE

16 EUROPE

16.1 MARKET OVERVIEW

The advances in domestic and international remote radiation services and the potential to transport complex devices to patients are important developments for primary medical imaging care. Currently, mobile CT, MRI, US, and positron emission tomography (PET) machines are available throughout the region. Also, these machines can be placed in the vicinity of primary care facilities regularly or intermittently. Fixed scanners can be used to scan patients with homes in sparsely populated areas. The images are then sent to the reporting point and the findings are returned to the general practitioner. Private or public companies exclusively provide these services, and reports are produced at a reporting center located in Central Europe. Several governments in the region are undertaking initiatives to develop radiology and mobile imaging services. For instance, the collaborative paper by the World Organization of Family Doctors (WONCA) Europe and the European Radiology Society underscores the need for collaboration between clinical radiology and general practitioners with the primary goal of enhanced patient care in the region.

Furthermore, the availability of mobile imaging services in Europe has increased significantly in the past few years. Factors such as the expanding elderly population and the increasing prevalence of chronic diseases are driving the growth of the regional market. As a leader in the international medical technology community, Germany is actively involved in developing and advancing various medical imaging techniques, such as CT, MRI, mammography, and ultrasound. Therefore, these factors will stimulate the growth of the European market during the forecast period. Several key players in the region are contributing to the growth of the regional market. For instance, Siemens Healthineers has its headquarters in the region. Also, the company is one of the most advanced and top revenue-generating medical imaging and radiology companies. The high revenue generation of the player is expected to drive the growth of the regional market.

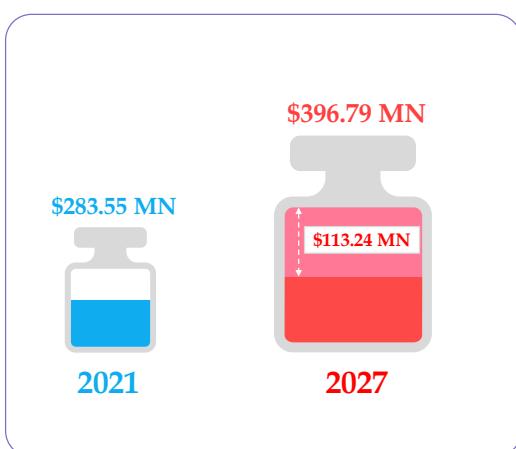
In Europe, most governments spend billions of dollars on healthcare and offer funding for the entire value chain of the healthcare system, especially for providers and payers. Even radiological centers and general practitioners receive funds to

provide value-based healthcare services to patients. In some EU countries, the insurance system pays for personal healthcare, and the patient's health insurance can be reimbursed directly to the radiology clinic without affecting the general practitioner. According to German Health Alliance, the mobile and portable X-ray systems manufactured by OR Technology in Germany enable rapid and best diagnostic imaging worldwide. Consequently, the orders for mobile X-ray solutions from the company have multiplied in recent years. The rise in inclination toward mobile and home healthcare services in Europe is encouraging service providers to deliver mobile X-rays and other medical imaging services directly to patients, which prevents long waiting times in overcrowded hospitals. The mobile X-ray device is set up and ready to use within 2 minutes. The integrated diagnostic software guarantees fast global information exchange via the cloud or email.

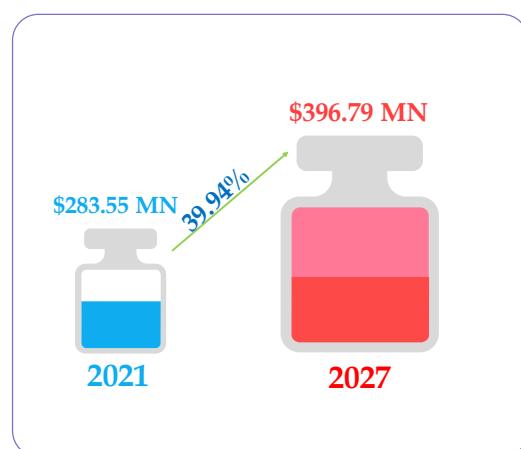
Most domestic medical device manufacturers focus on R&D initiatives and most of their sales are concentrated in countries across Europe, North America, and APAC. As in other geographical regions, the growing elderly population, high incidence of chronic diseases, and growing demand for advanced medical infrastructure are expected to drive the demand for mobile imaging services across Europe. Therefore, the surge in demand for advanced medical services will offer new growth opportunities for vendors in the European mobile imaging services market. All these factors will enable the penetration of the market in the region.

Exhibit 66 Europe Mobile Medical Imaging Services Market: Incremental & Absolute Growth

INCREMENTAL GROWTH

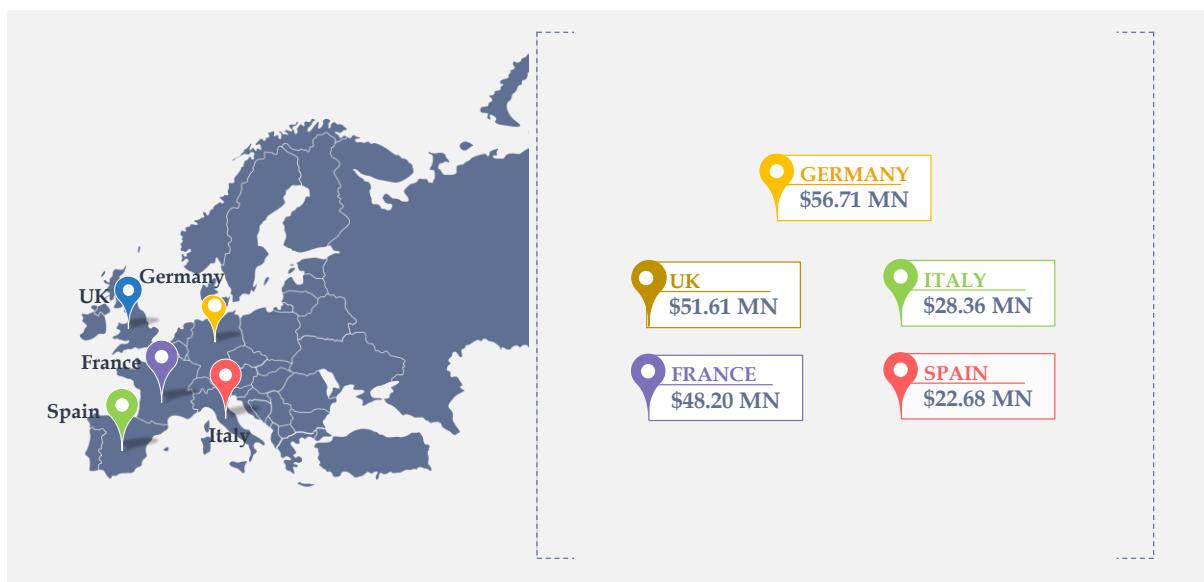


ABSOLUTE GROWTH



Source: Arizton

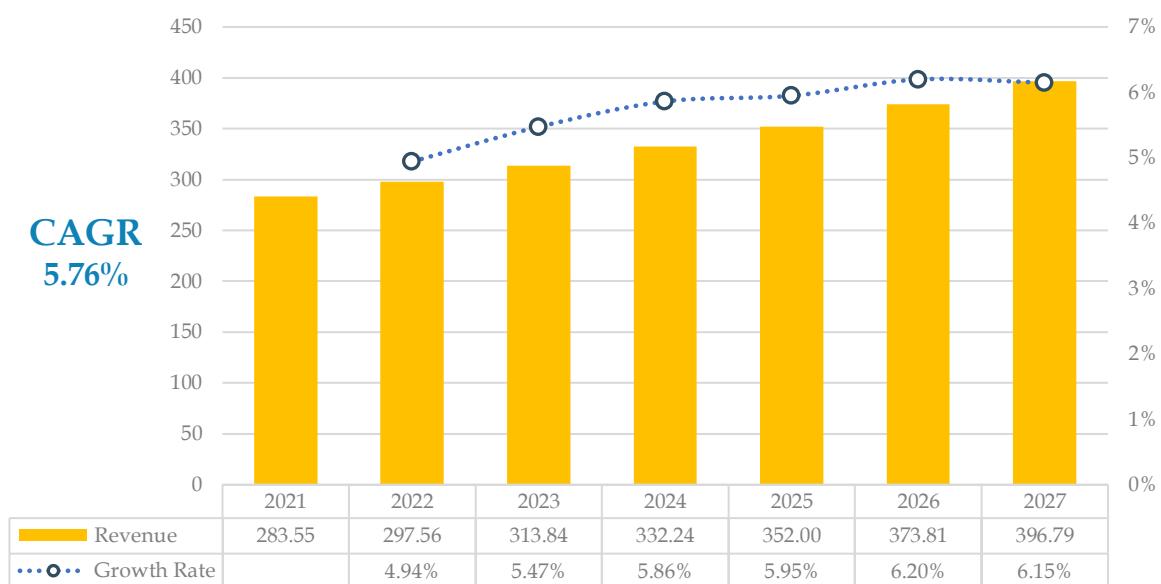
Exhibit 67 Europe Mobile Medical Imaging Services Market: Key Countries (\$million)



Source: Arizton

16.2 MARKET SIZE & FORECAST

Exhibit 68 Europe Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the European mobile medical imaging services market was valued at \$283.55 million, which is expected to grow at a CAGR of 5.76% to reach \$396.79 million by 2027.

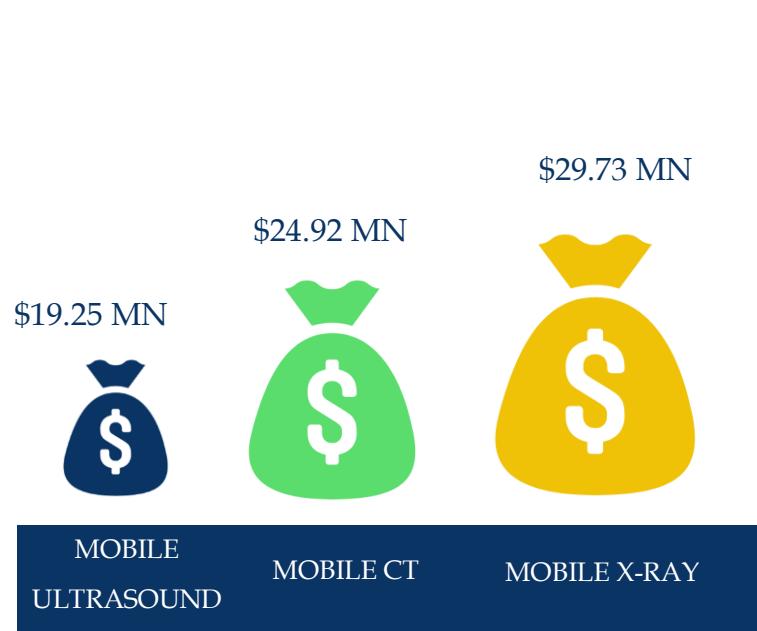
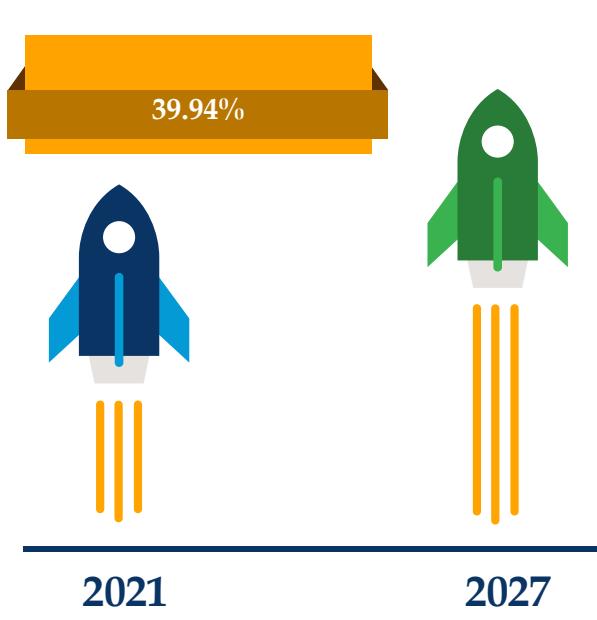
16.3 EUROPE: SERVICE TYPE SEGMENTATION

Exhibit 69 Incremental Growth By Service Type 2021 & 2027

SERVICE TYPE	2021	2027	CAGR
MOBILE X-RAY	\$69.47 MN	\$99.20 MN	6.12%
MOBILE CT	\$56.43 MN	\$81.34 MN	6.29%
MOBILE ULTRASOUND	\$50.19 MN	\$69.44 MN	5.56%
MOBILE MRI	\$33.74 MN	\$50.79 MN	7.05%
MOBILE EKG	\$27.79 MN	\$34.12 MN	3.48%
OTHERS	\$45.94 MN	\$61.90 MN	5.10%

ABSOLUTE GROWTH

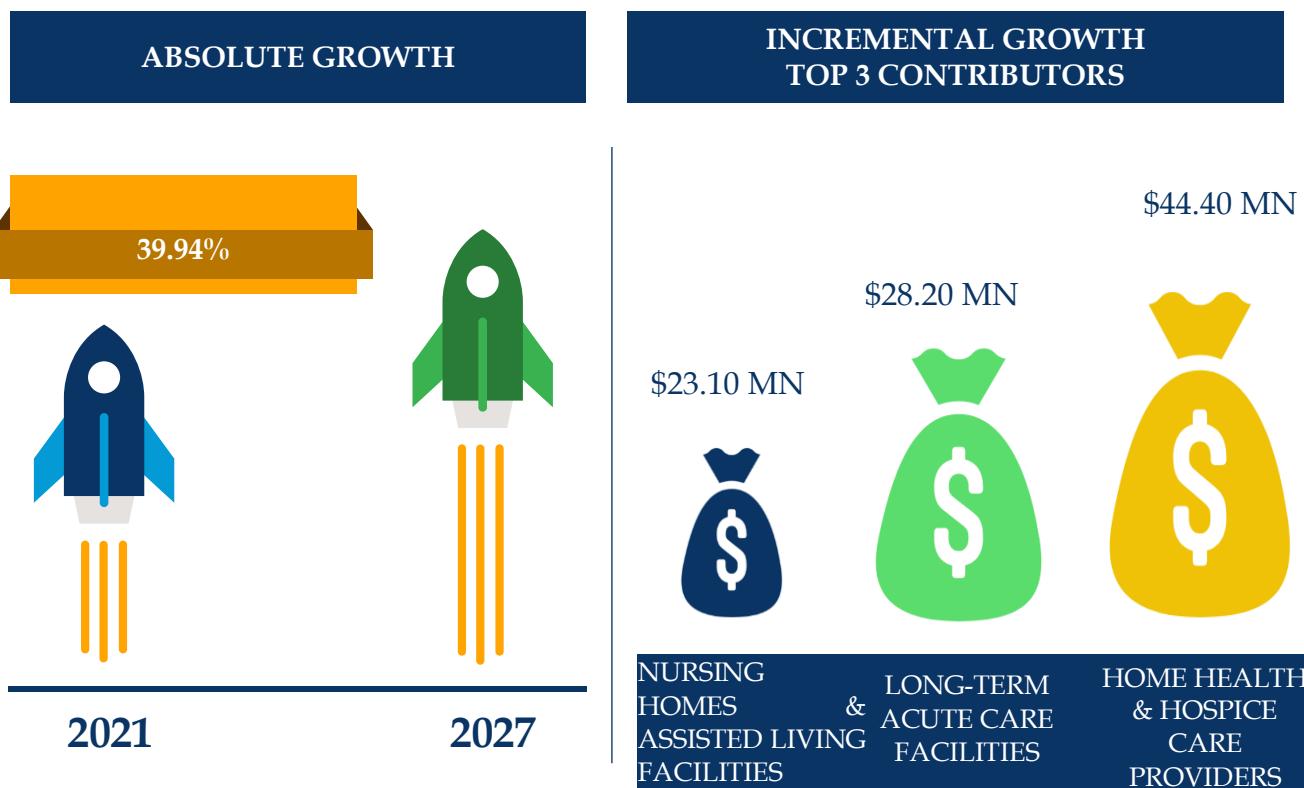
INCREMENTAL GROWTH TOP 3 CONTRIBUTORS



16.4 EUROPE: END-USER SEGMENTATION

Exhibit 70 Incremental Growth by End User 2021 & 2027

END USER	2021	2027	CAGR
NURSING HOMES & ASSISTED LIVING FACILITIES	\$61.81 MN	\$84.91 MN	5.43%
HOME HEALTH & HOSPICE CARE PROVIDERS	\$97.26 MN	\$141.66 MN	6.47%
LONG-TERM ACUTE CARE FACILITIES	\$72.59 MN	\$100.79 MN	5.62%
OTHERS	\$51.89 MN	\$69.44 MN	4.98%



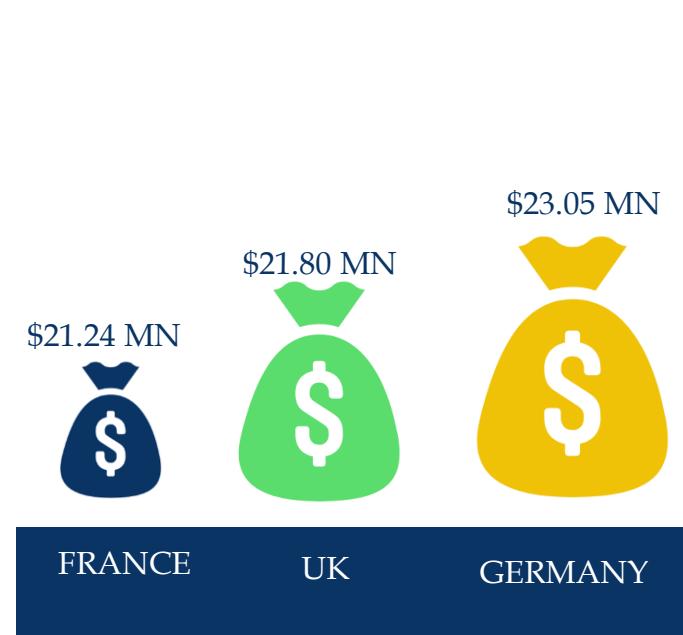
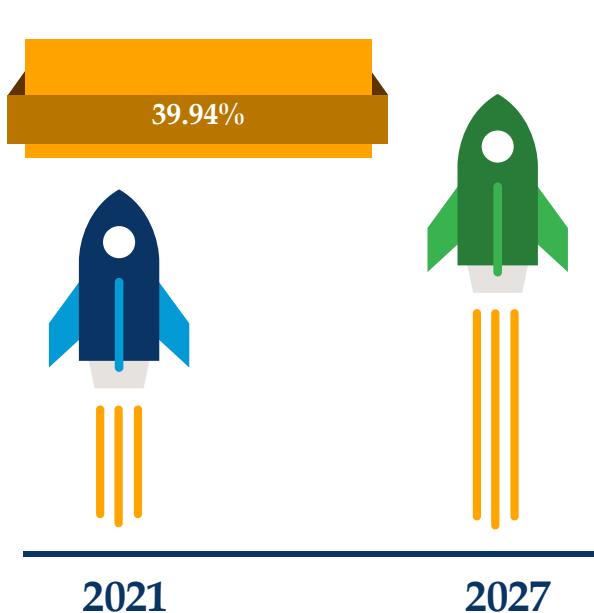
16.5 EUROPE : KEY COUNTRIES

Exhibit 71 Incremental Growth in Europe by Key Countries 2021 & 2027

COUNTRY	2021	2027	CAGR
GERMANY	\$56.71 MN	\$79.76 MN	5.85%
UK	\$51.61 MN	\$73.41 MN	6.05%
FRANCE	\$48.20 MN	\$69.44 MN	6.27%
ITALY	\$28.36 MN	\$40.08 MN	5.94%
SPAIN	\$22.68 MN	\$30.55 MN	5.09%

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16.5.1 Germany: Market Size & Forecast

In 2021, Germany accounted for a share of 20% in the European mobile medical imaging services market. Some of the major growth drivers for the market include the rise in the number of individuals affected by chronic conditions, a surge in the demand for imaging procedures, constant public and private investments, and advances in medical technology used in imaging systems.

According to a study, Germany is among Europe's frontrunners for the number of individual medical examinations performed. The country performs twice as many X-ray and MRI scans on a per capita basis as most other countries. In 2018, the highest number of scans were recorded in Germany with higher than 14,000 scans per one lakh inhabitants. In 2018, Germany reported more than 2 MRI units per one lakh individuals. The largest increase in the availability of MRI units was recorded in Germany where the number of MRI units rose by 0.6 units per one lakh inhabitants between 2013 and 2017. A total of 800,000 and 900,000 PET scans were performed in the German hospitals in 2012 and 2013, respectively. The use of diagnostic imaging techniques in hospitals increased by more than 50% between 2006 and 2010. The rise in the number of medical imaging procedures is expected to propel the demand for medical imaging services.

The steady rise in radiology examinations and staff shortages have contributed to a limited amount of time per case and a high risk of missing clinically relevant findings. There are only 9 radiologists per one lakh population in Germany. With the increase in the number of imaging examinations, there is a high demand for radiologists to handle such equipment. The lack of qualified professionals is a major problem leading to decreased manpower as most radiologists will be retiring in the coming years.

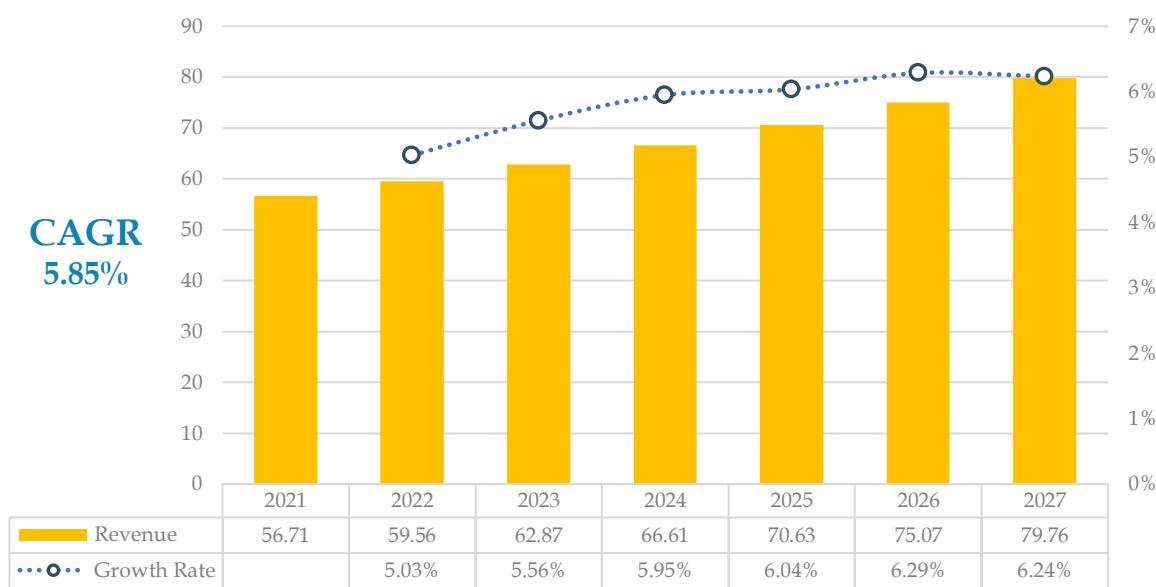
In Germany, X-ray and angiography modalities are open for use by non-radiologist clinicians. However, clinicians must either acquire the necessary qualifications or use imaging technologies that fall within the scope of their specialty. The demand for angiography has benefitted from advances in interventional radiology. However, the demand for X-ray equipment is declining mainly due to the economic situation of non-radiologic users of such equipment.

The introduction of digital X-ray technologies has led to the replacement of conventional systems. Germany is in the process of establishing a national mammography screening program, which might replace a certain proportion of

existing equipment. The federal government of Germany encourages activities that contribute to innovation through incentive programs and research projects. Collaborations between medical imaging companies and universities for the development of innovative technologies have witnessed a considerable increase over the years.

The German market is the largest in Europe for innovative mobile medical imaging technologies. Additionally, the German market provides a powerful platform for developing mobile medical imaging technology for many qualified users. However, the German Electrical Manufacturers' Association (ZVEI) estimates that Germany's backlog for mobile medical imaging equipment is between €5–€7 billion compared to the previous year. Thus, such conditions are compelling major healthcare stakeholders, including government and healthcare providers, to modernize the existing healthcare infrastructure by procuring necessary medical imaging equipment for providing medical imaging services to its citizens.

Exhibit 72 Germany Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the German mobile medical imaging services market was valued at \$56.71 million, which is expected to grow at a CAGR of 5.85% to reach \$79.76 million by 2027.

16.5.2 UK: Market Size & Forecast

In 2021, the UK accounted for a share of 18.2% in the European mobile medical imaging services market. The UK has been witnessing an increase in the elderly population and a considerable rise in the adoption of imaging and diagnostic equipment. Also, the surge in public and private healthcare expenditure and the demand for the latest diagnostic imaging equipment, technological advances in imaging systems, and the rise in the adoption of computer-aided diagnoses are expected to propel market growth. Around one-fifth of the people in the country are aged 65 or above, which was around 12.3 million people in 2019. Around 17.4 million individuals in the country are likely to be aged 65 or above by 2043.

The aging population in the country is highly prone to several age-related disorders, which has contributed to a significant rise in the hospitalization rate and the use of mobile medical imaging systems. Also, the surge in the aging population in the country has increased the burden of diseases and accelerated the demand for surgical procedures that require X-ray imaging using diagnostic imaging equipment.

The rise in the diagnostic imaging volume is expected to propel the demand for radiologists in the country's healthcare settings. In England, the consultant radiologist workforce is short-staffed by 35% and requires at least another 1,613 full-time consultants to keep up with safe staffing quotas and the demand for scans. Without improvements, the workforce will only increase by 571 consultants over the next four years. The acute shortage of radiologists will propel the demand for teleradiology services and compel hospitals to outsource diagnostic imaging services.

The UK has a high adoption rate of medical imaging techniques as almost 45.2 million tests were performed between October 2018 and September 2019. Also, 3.58 million imaging tests were conducted in September 2019. X-ray was the most commonly performed diagnostic imaging procedure with 1.86 million tests, followed by 0.81 million ultrasound tests, 0.47 CT scans, and 0.30 million MRI scans. Thus, all these figures are indicative of the high demand for imaging equipment across the country with tremendous opportunities to leverage the latest advances in medical imaging.

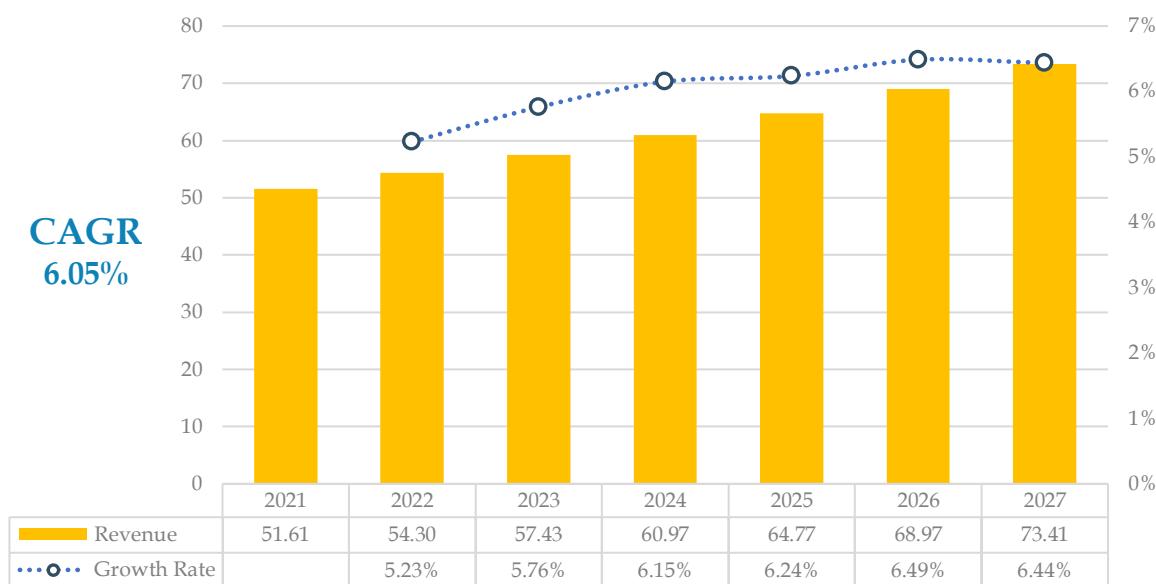
In 2018, the UK government had allocated funds of around \$59 million to launch five technology centers dedicated to medical AI. These units will be located at National Health Service (NHS) facilities and universities and will enable hospitals to obtain digital scans and biopsy images and reduce manual reporting. The UK has emerged

as a major hub for AI in healthcare as the country is home to some big players and a large number of emerging start-ups.

According to the National Health Service (NHS), every year the UK performs over 45 million imaging procedures annually, including 25 million X-rays, 10.5 million ultrasound scans, 5.5 million CT scans, and 4 million MRI scans. Also, UK HealthCare Radiology, a UK-based medical group practice, uses advanced imaging techniques to perform various therapeutic intervention procedures. Several initiatives are being supported at local and national levels to increase the number of radiology professionals. Also, additional radiology training positions have been created with the establishment of three new radiologist academies to train 20 radiologists annually at established training institutions. With all these favorable initiatives, the workforce of image technicians has also increased significantly.

Osteoarthritis is the most common health condition among individuals aged above 65 in the country. Also, the condition is associated with high levels of mortality and poor quality of life. The surge in the incidence of chronic and life-threatening illnesses is the main growth driver for the market. In the UK, every two minutes, someone is diagnosed with cancer. Breast, prostate, lung, and colon cancer accounted for more than half of all new cancer cases in the country in 2018. Between 2015 and 2017, more than one-third or 36% of all cancer cases in the country were diagnosed among individuals aged above 75. The combined incidence of all cancers is the highest in the UK among individuals aged between 85 and 89. Therefore, diagnostic imaging plays an important role in oncology, as tools such as CT are the most beneficial and preferred imaging methods for many diseases. All these factors have contributed to the growth of the UK mobile medical imaging services market.

Exhibit 73 UK Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the UK mobile medical imaging services market was valued at \$51.61 million, which is expected to grow at a CAGR of 6.05% to reach \$73.41 million by 2027.

16.5.3 France: Market Size & Forecast

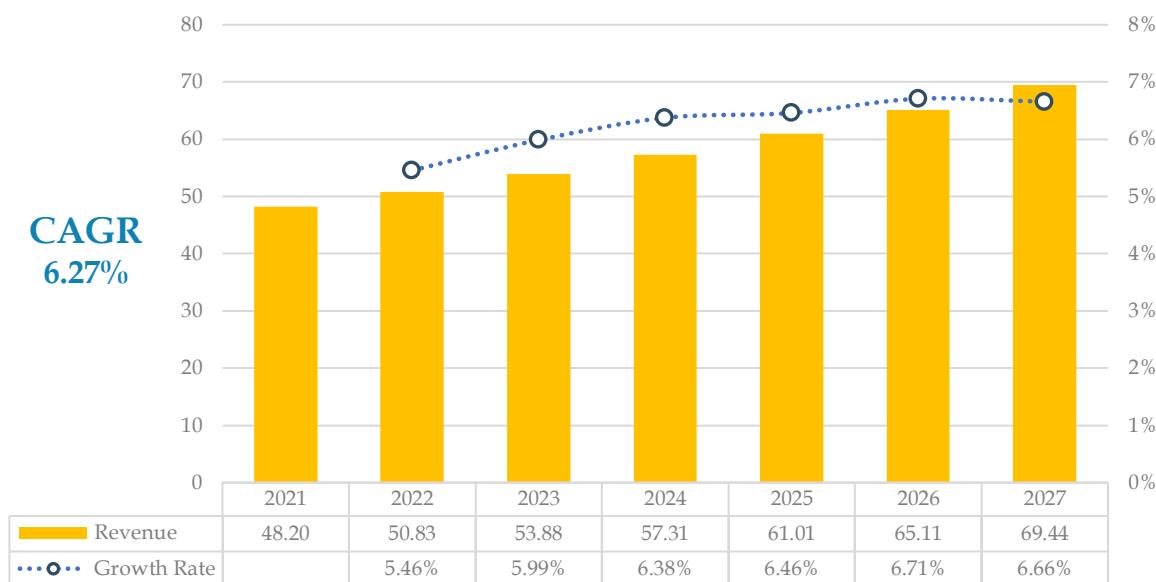
In 2021, France accounted for a revenue share of 17% in the European mobile medical imaging services market. Several factors, including the reorganization of local health authorities, the rise in demand for value-added services, and advances in the customization of medical imaging solutions, have impacted the conventional purchasing behavior of conservative and risk-based decision-makers. The decision to undergo medical imaging among patients in France continues to be heavily influenced by radiologists' recommendations. Also, patients in the country do not think about the financial implications of medical imaging due to the presence of an efficient reimbursement scenario in the country. Such factors have created a unique and rewarding environment for the development of various new business models, such as MES and Multi-Vendor Services (MVS), which has propelled the growth of the French medical imaging services market.

Furthermore, mobile medical imaging service providers must showcase the value of their offerings to interdisciplinary teams and ideally support them with solid case studies of similar implementations in France or neighboring countries. Providing risk-based contracts and transparency regarding prices and best buying practices along with the advisory sales approach will open new growth avenues for sellers. Some of the major growth drivers for the market include the surge in the prevalence of chronic diseases, the rise in the adoption of advanced medical imaging techniques, and the rapid expansion of the elderly population.

The elderly population in the country is susceptible to chronic illnesses. According to the World Aging 2019 report, the French population aged above 65 was estimated at 13.281 million (20.4%). The number is projected to reach 16.094 million (24.1%) in 2030. Therefore, the elderly population is expected to grow substantially in the coming years, which will result in a considerable surge in the population of individuals who are susceptible to chronic diseases that affect the cardiovascular system and musculoskeletal system, which will have a positive impact on the market. Also, improvements in diagnostic procedures used to treat illnesses will accelerate the market growth. France accommodates many internationally renowned companies that have become the global standard for mobile medical imaging services with world-renowned French know-how and scientific excellence. Also, France is a

model country for medical imaging, with 8,885 doctors specializing in radiodiagnosis and medical imaging, and approximately 33,500 electrobiological manipulators.

Exhibit 74 France Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the French mobile medical imaging services market was valued at \$48.20 million, which is expected grow at a CAGR of 6.27% to reach \$69.44 million by 2027.

16.5.4 Italy: Market Size & Forecast

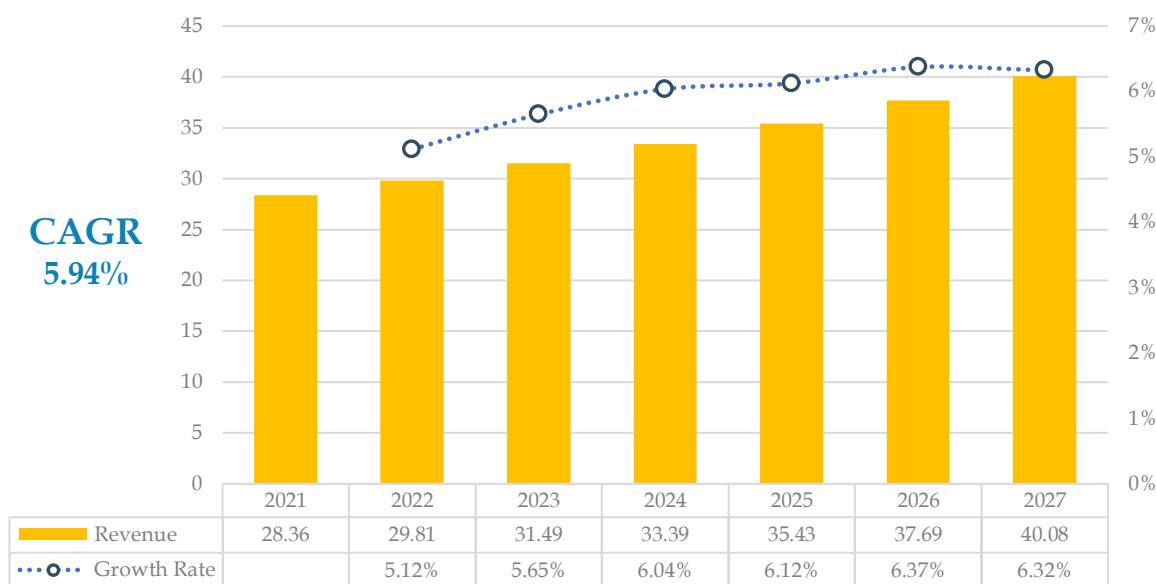
In 2021, Italy accounted for a revenue share of 10% in the European mobile medical imaging services market. Factors such as the rise in the elderly population, high exposure to chronic diseases, and technological advances have contributed to the growth of the Italian mobile medical imaging services market. The aging population is contributing to the steady growth of the country's diagnostic imaging market. According to Eurostat, in 2018, the number of individuals aged above 65 accounted for about 22.6% of the total Italian population. Therefore, a large proportion of the elderly population base is expected to play an important role in the use of mobile medical imaging services in the future. Therefore, the high unmet demand for imaging technologies is expected to drive market growth during the forecast period.

Tumors and cancers are the major causes of morbidity and mortality in the country. In 2018, breast, colon, and prostate cancers emerged as the most common cancers among both men and women in Italy. In the same year, breast cancer accounted for more than 13% of all new cancer cases. Diagnostic imaging plays an important role in interventional oncology and the tremendous opportunities for minimally invasive diagnosis and treatment are expected to drive market growth.

The Italian mobile imaging services market is stable due to the high adoption of different imaging modalities in the country. Vascular X-ray equipment for cardiology and interventional digital radiology have a high market share in the country. The Italian nuclear medicine sector is expected to grow steadily as 600 imaging machines are being used to meet the current demand. The high-cost sensitivity of Italian public health service providers and limited access to capital resources are the main reasons for the adoption of new purchasing and service models for capital formation devices. Various Italian municipalities are cautious about the possibility of a framework agreement with the Industrial Consortium to provide a viable long-term strategy for equipment renewal to combat equipment aging.

Innovation plays an instrumental role in minimizing medical costs as it involves high expenses. The Italian National Health Service (NHS) has limited resources, and therefore, the medical investment must be evaluated based on the relationship between adequacy, efficiency, and cost-effectiveness. Thus, all these factors will contribute to the growth of the market.

Exhibit 75 Italy Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Italian mobile medical imaging services market was valued at \$28.36 million, which is expected to grow at a CAGR of 5.94% to reach \$40.08 million by 2027.

16.5.5 Spain: Market Size & Forecast

In 2021, Spain accounted for a revenue share of 8% in the European mobile medical imaging services market. Key growth drivers for the Spanish diagnostic imaging market include the surge in prevalence of chronic diseases, the growth of aging populations, technological advances, and rapid device innovation. The aging population in the country is contributing to the steady growth of the Spanish mobile medical imaging services market. According to the Spanish National Bureau of Statistics (INE), by 2050, individuals aged 65 and above will account for more than 30% (about 13 million) of the population, while the population of individuals aged 80 and above will exceed 4 million and account for 30% of the total population. Therefore, a larger elderly population base is expected to play an important role in the use of images in the future. Therefore, the high unmet demand for imaging technologies is expected to stimulate market growth during the forecast period.

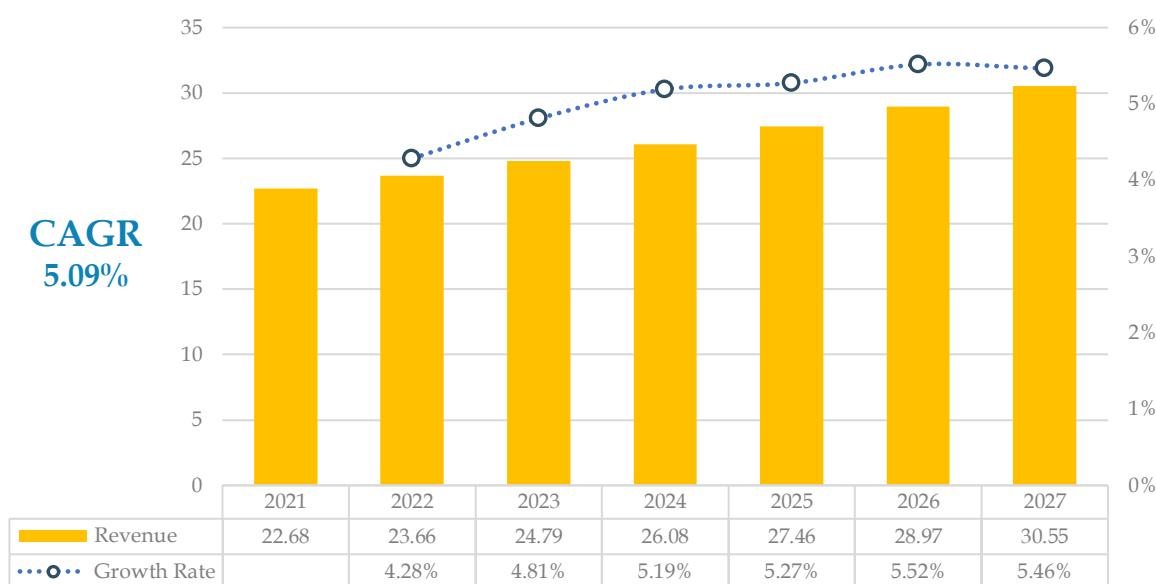
The future of the Spanish diagnostic imaging market looks bright with tremendous opportunities in hospitals and imaging centers. Factors such as high healthcare costs, a rise in public awareness associated with early detection of illnesses, technological advances in imaging, and a considerable surge in the elderly population are expected to drive market growth. New trends that directly impact the dynamics of the market include the rise in the use of technologically advanced diagnostic imaging systems, the development of portable diagnostic imaging systems to improve diagnostic procedures, and accurate diagnostic imaging.

Additionally, factors such as the high demand for effective and early diagnosis, the surge in the global epidemic of targeted diseases associated with the aging population, and the focus on minimally invasive diagnostic imaging methods and technologies, including increasing the benefits of mobile imaging over others. The significantly high installation and maintenance costs, uncertain reimbursement scenarios in developing countries, and a shortage of well-trained and skilled medical professionals can hinder the growth of the Spanish mobile medical imaging services market during the forecast period.

Innovative diagnostic and therapeutic techniques have a considerable influence in the field of radiology in Spain. The goal of using these imaging techniques is to make a quick and highly accurate diagnosis so that the patient can be effectively treated to

achieve the best health outcomes. Approximately 4 million computed tomographies (CT) examinations are performed every year in the country to enable non-invasive detailed mapping of human anatomical internal structures. Despite its clinical benefits, exposure to low to moderate doses of ionizing radiation on CT scans is associated with a high risk of brain tumors and leukemia among children and young adults.

Exhibit 76 Spain Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Spanish mobile medical imaging services market was valued at \$22.68 million, which is expected to grow at a CAGR of 5.09% to reach \$30.55 million by 2027.



APAC

17 APAC

17.1 MARKET OVERVIEW

A large population base with aggressive regulatory development and improved medical facilities could provide vendors in the Chinese mobile medical imaging services market with favorable growth opportunities. The presence of high revenue-generating market players such as Konica Minolta and Hitachi has made the country a major technology center for innovation. According to estimates, the prevalence of cardiovascular diseases is expected to increase significantly among the country's population. Therefore, all these factors are expanding the scope and growth of the market.

Furthermore, China and India in APAC are densely populated and populations in these countries are prone to various chronic illnesses. The high demand for ultrasonic systems due to the increase in consumer disposable income is contributing to the growth of the market under investigation. The increasing prevalence of chronic diseases such as cancer has propelled the demand for mobile imaging services. This is another factor that complements the growth of the mobile medical imaging services market. Japan is one of the world's leading countries to introduce technologically advanced products due to its advanced medical infrastructure. Additionally, Japan has emerged as an R&D hub due to the presence of several healthcare companies. Most importantly, the Japanese government widely supports the adoption of advanced technologies. Thus, such factors will propel the demand for mobile imaging systems and complement the growth of the Japanese mobile medical imaging services market.

The adoption of wearable imaging technology in healthcare across India and various other countries across APAC is attributable to the rise in the population of health-conscious individuals. The rise in demand for mobile medical imaging services is also attributable to the lack of basic healthcare infrastructure in many countries across the region. Also, the rise in demand for mobile imaging services is attributable to the surge in the number of patients and the high cost of medical care. According to the World Heart Federation, non-communicable diseases such as cardiovascular disease, are expected to cause a significant number of deaths in the region, which could propel the demand for mobile medical imaging services. These reasons will propel

the growth of the APAC mobile imaging services market. The growing awareness of the benefits of using advanced technologies and the rising demand for high-quality patient care are driving the demand for portable imaging services in South Korea. The rapid growth of the medical tourism industry with the rise of home-based medical services are driving the advances in mobile medical imaging services across the country. The growth of medical tourism has contributed to the surge in the number of hospitals and surgical centers and the adoption of new medical equipment. Therefore, such developments are supporting the growth of the South Korean mobile medical imaging services market.

The Chinese market has great opportunities for profitable expansion due to the presence of leading companies in the domestic mobile imaging services market. In addition, China's large population will make it an ideal destination for significant growth, along with improved medical facilities and some positive regulatory developments. Major companies such as Shimadzu and Mindray Medical International Limited manufacture medical devices such as patient monitoring and medical imaging systems. Thus, factors such as the presence of these prominent players in the region and the high revenue generation potential will drive the growth of the regional market. The process of aging is often associated with the high risk of chronic diseases and the development of bone and muscle weakness. Older patients are at a higher risk of developing a variety of medical conditions, including orthopedic conditions, lung problems, and abdominal illnesses.

According to World Health Organization, in 2018, 125 million people were aged above 80. By 2050, China alone will be home to about 120 million people, and this age group is home to about 434 million people worldwide. Also, by 2050, almost 80% of the elderly population is projected to live in low- and middle-income countries. Factors such as high patient throughput, fast image acquisition rates, good image quality, and low radiation risk have accelerated the demand for mobile medical imaging services in China. Similarly, the considerably large patient base and high healthcare expenditure are some of the most important growth drivers for the Indian market. Additionally, the lack of basic healthcare infrastructure has contributed to a surge in health problems and accelerated the demand for mobile medical imaging services in the APAC region.

Exhibit 77 APAC Mobile Medical Imaging Services Market: Key Countries (\$million)



Source: Arizton

Exhibit 78 APAC Mobile Medical Imaging Services Market: Incremental & Absolute Growth

INCREMENTAL GROWTH



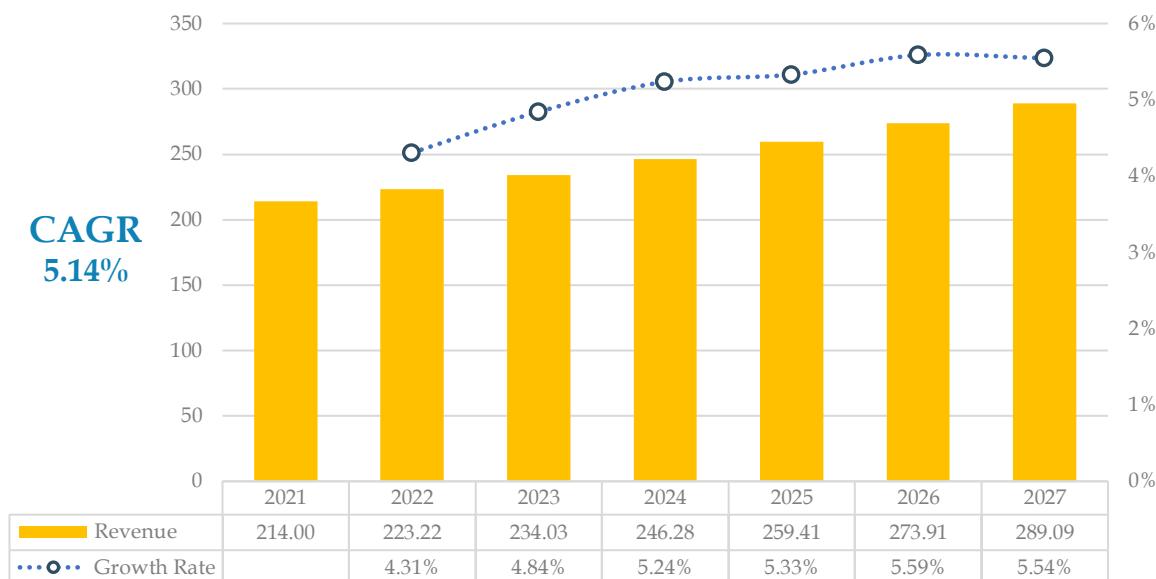
ABSOLUTE GROWTH



Source: Arizton

17.2 MARKET SIZE & FORECAST

Exhibit 79 APAC Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the APAC mobile medical imaging services market was valued at **\$214.00** million, which is expected to grow at a CAGR of **5.14%** to reach **\$289.09** million by 2027.

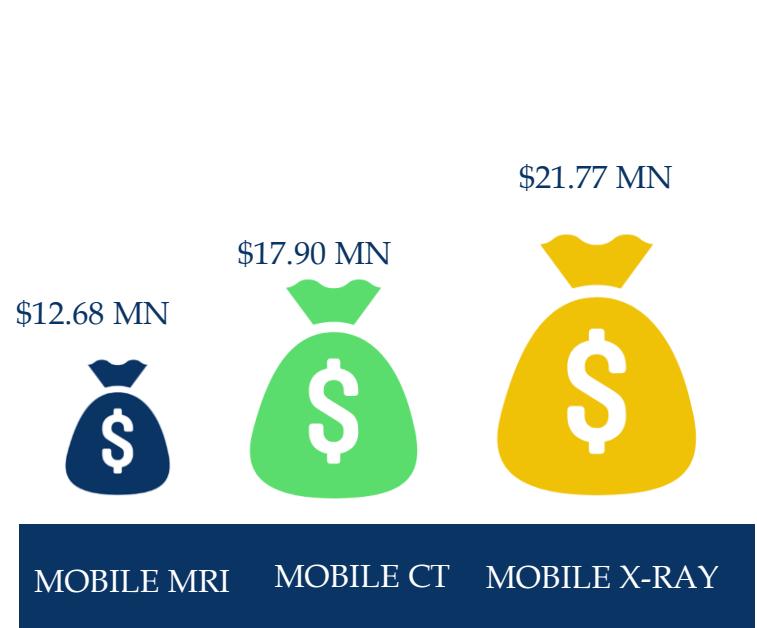
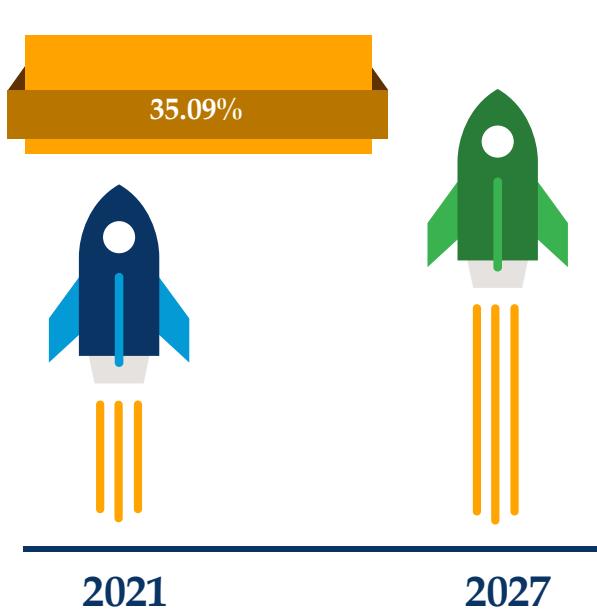
17.3 APAC: SERVICES TYPE SEGMENTATION

Exhibit 80 Incremental Growth By Service Type 2021 & 2027

SERVICE TYPE	2021	2027	CAGR
MOBILE X-RAY	56.28 MN	78.06 MN	5.60%
MOBILE CT	41.94 MN	59.84 MN	6.10%
MOBILE ULTRASOUND	38.31 MN	50.30 MN	4.65%
MOBILE MRI	24.61 MN	37.29 MN	7.17%
MOBILE EKG	21.61 MN	27.17 MN	3.89%
OTHERS	31.24 MN	36.43 MN	2.59%

ABSOLUTE GROWTH

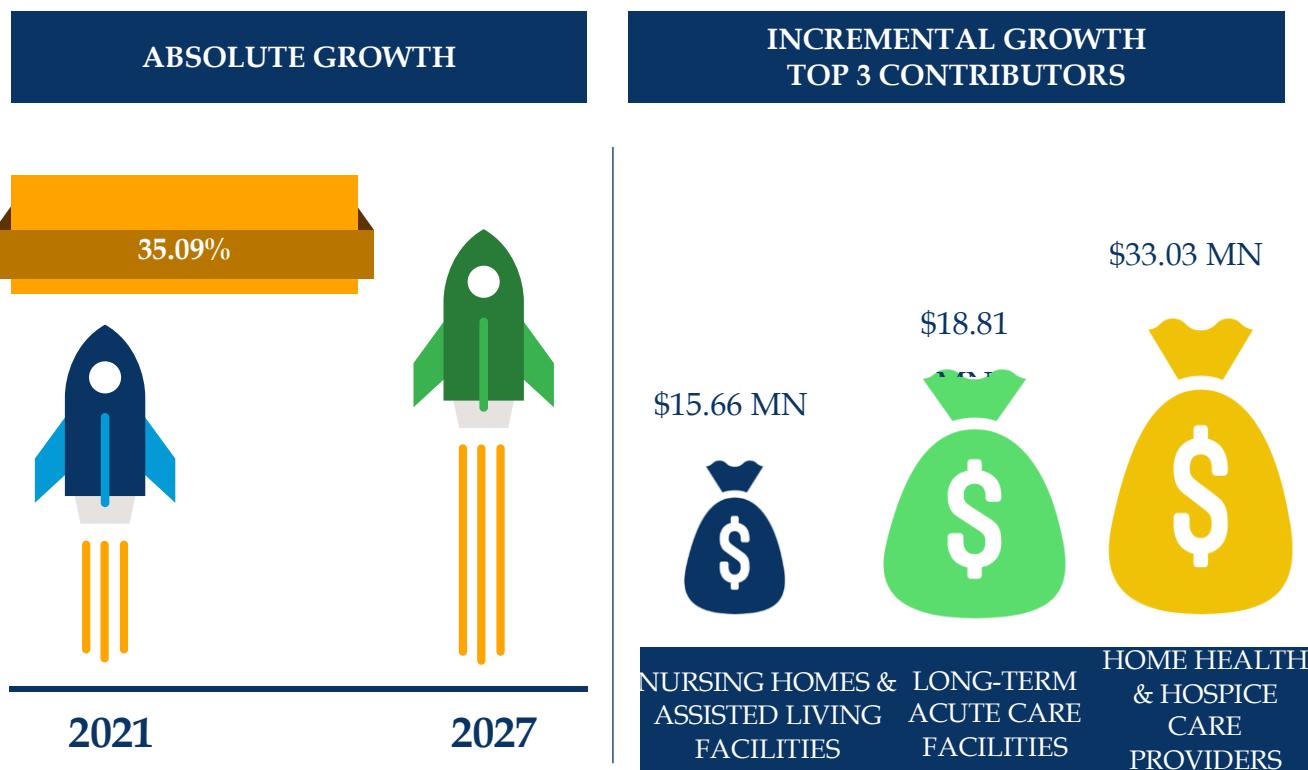
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17.4 APAC: END-USER SEGMENTATION

Exhibit 81 Incremental Growth by End User 2021 & 2027

END USER	2021	2027	CAGR
NURSING HOMES & ASSISTED LIVING FACILITIES	\$47.94 MN	\$63.60 MN	4.83%
HOME HEALTH & HOSPICE CARE PROVIDERS	\$76.83 MN	\$109.86 MN	6.14%
LONG-TERM ACUTE CARE FACILITIES	\$56.07 MN	\$74.88 MN	4.94%
OTHERS	\$33.17 MN	\$40.76 MN	3.49%

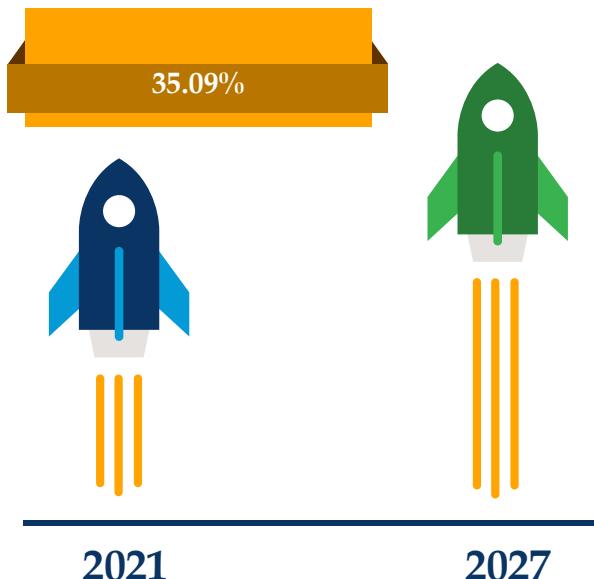


17.5 KEY COUNTRIES

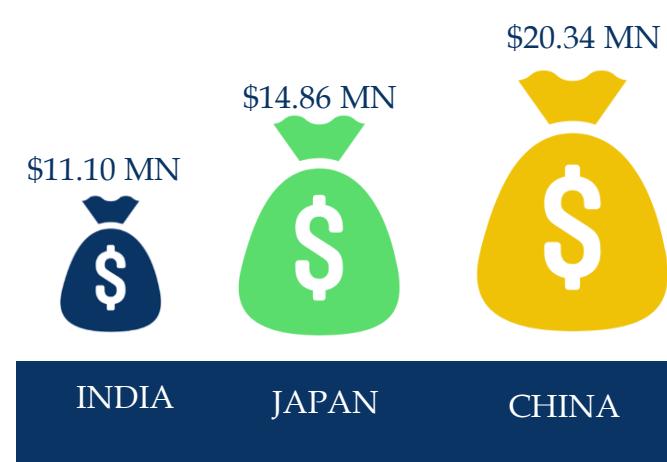
Exhibit 82 Incremental Growth in APAC by Key Countries 2021 & 2027

COUNTRY	2021	2027	CAGR
CHINA	\$51.36 MN	\$71.70 MN	5.72%
JAPAN	\$47.29 MN	\$62.15 MN	4.66%
INDIA	\$25.04 MN	\$36.14 MN	6.31%
AUSTRALIA	\$21.61 MN	\$28.62 MN	4.79%
SOUTH KOREA	\$17.55 MN	\$20.81 MN	2.89%

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17.5.1 China : Market Size & Forecast

In 2021, China accounted for a revenue share of 24% in the APAC mobile medical imaging services market. The Chinese market is expected to witness healthy growth due to the high prevalence of chronic diseases, the surge in the aging population, and the high adoption of advanced technologies in mobile medical imaging equipment. With the surge in the aging population, the country will witness a significant increase in the number of patients affected by chronic diseases. According to World Population Aging 2019 report, China's population of individuals aged 65 and above is projected to grow from 164.48 million in 2019 to 246.98 million by 2030. Neurological disorders are expected to drive the market growth during the forecast period as elderly individuals are more susceptible to chronic diseases such as cardiovascular disease, cancer, and respiratory tract infections. Therefore, the majority of the elderly population prefers mobile medical imaging services compared to younger individuals. Therefore, the rise of the elderly population is expected to propel the demand for mobile medical diagnostic imaging services in the country. Some key focus areas of vendors in the market include accelerating the speed of taking high-quality diagnostic images, capturing images in the right place and at the right time, achieving better patient care at lower cost, automating workflows, and more.

The surge in the elderly population, the prevalence of chronic diseases and infectious diseases, advances in imaging and diagnosis, high demand for novel imaging techniques, R&D initiatives, and healthcare expenditures by government and private organizations are expected to drive the growth of the Chinese market. The unprecedented increase in the population, the high prevalence of sedentary lifestyles, and the rise in hospitalization rates are expected to propel the demand for early and appropriate diagnoses. Thus, the demand for diagnostic imaging to identify various conditions will propel the demand for mobile medical imaging services in the region.

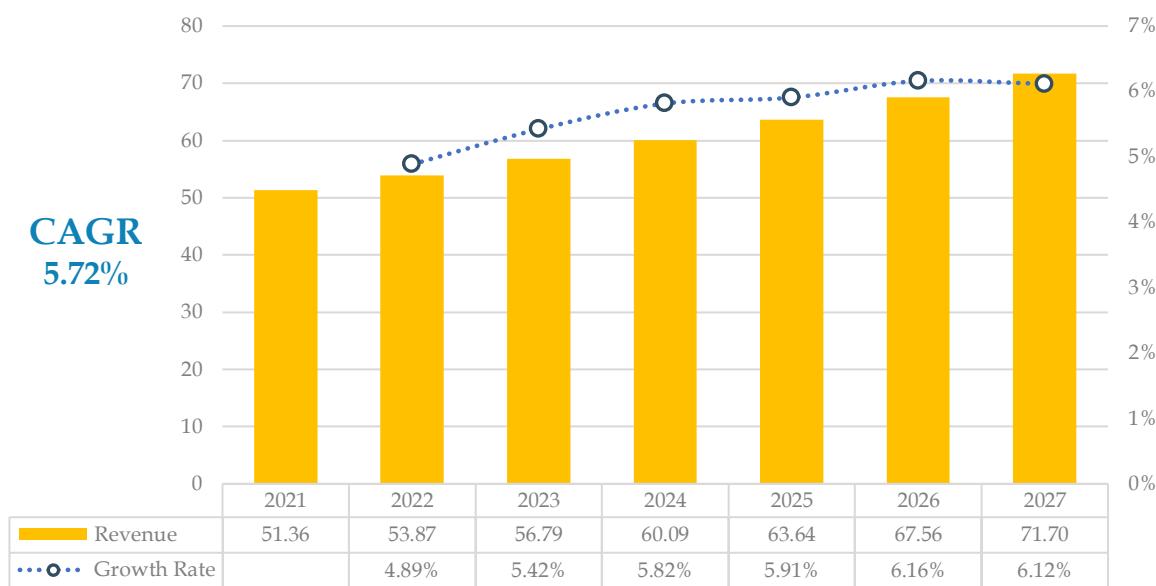
The lack of radiologists despite a rapidly rising number of diagnostic imaging systems is expected to adversely impact the Chinese market. The shortage of radiologists in the country, especially the ones specializing in diagnostic imaging, has emerged as a major growth deterrent. Also, such factors have led to heavier workloads, regional variability, and the delivery of low-quality diagnostic imaging services. Hitachi Healthcare is working to develop solutions that improve the

efficiency and quality of diagnostic imaging through the use of digital technologies such as AI, big data, and the Internet of Things (IoT). The country is constantly making advances in diagnostic imaging due to the lack of medical resources, especially high-quality resources, which has created an urgent need for innovative mobile medical technologies.

The use of nuclear medicine and imaging has increased significantly in the country. The surge in the prevalence of bone disease and cancer and technological advances in diagnosis are expected to drive market growth over the forecast period. Cancer burden and associated mortality rates are high in the country. According to the latest 2018 report released by the WHO, China has recorded 4,285,033 new cancer cases, which include men and women of all ages, along with 2,865,174 reported deaths. Also, government funding has contributed to the growth of the Chinese radiopharmaceutical market from a funding perspective. However, certain factors are hindering market growth, such as the short half-life of radiopharmaceuticals and the high cost of technology.

The Chinese Society of Nuclear Medicine was established in 1980. Since then, nuclear medicine has developed rapidly in China. According to the Chinese Nuclear Medicine Society, there were a total of 306 PET scanners in 2017. In addition, more than 900 nuclear medicine departments are active in China, and about 1 million patients undergo nuclear medicine imaging every year across the country. In addition, with government support, the Chinese nuclear imaging market is expected to grow in the future. The rise in the Chinese population has led to an increase in the number of patients affected by diseases that must be diagnosed or treated by the use of MRI, CT, ultrasound, X-rays, or nuclear imaging. The rise of the patient population across the country has propelled the demand for mobile medical imaging services. Several large global players, such as Siemens Healthineers and GE Healthcare, dominate the Chinese mobile medical imaging services market and use their production bases to establish their presence in the country. Smaller domestic companies in the country, such as Mindray, are focused on gaining a greater market share in the Chinese market. Also, these small vendors are expected to grow as the Chinese government continues to prioritize investment in the domestic medical devices industry.

Exhibit 83 China Mobile Medical Imaging Services Market in 2021–2027 (\$ million)



Source: Arizton

In 2021, the Chinese mobile medical imaging services market was valued at \$51.36 million, which is expected to grow at a CAGR of 5.72% to reach \$71.70 million by 2027.

17.5.2 Japan: Market Size & Forecast

In 2021, Japan accounted for a revenue share of 22.1% in the APAC mobile medical imaging services market. The considerable surge in the aging population across countries such as Japan has contributed to the high prevalence of chronic illnesses, which has increased the hospitalization rates. The surge in the population of elderly individuals has also resulted in an unprecedented rise in the adoption of medical imaging equipment for rapid and effective analysis and treatment of patients. Thus, all these factors will propel market growth in the coming years.

The radiology domain in Japan is characterized by a large number of imaging units and a relatively small number of radiologists. The number of radiologists in Japan is 8,610, which comprises 3% of the total physicians as reported in 2012. The number of radiologists per million population in Japan is 36, which is only one-third of the average number in all countries. In contrast, the number is high in Greece, Denmark, Italy, and France.

Despite the small number of radiologists, Japan has a dense distribution of imaging units as there is no limit on the installation of expensive equipment and devices. Such factors have enabled patients to easily access advanced imaging technologies with relatively short waiting periods. The number of multi-detector row CT (MDCT) in Japan has been increasing every year and reached approximately 8,000 in 2010. The proportion of MDCTs equipped with more than 64 detectors has been rising in the last several years. Although there has been a rise in the number of MRI scanners in Japan, the growth has slowed down in the last several years.

Imaging rates in Japan are likely to grow in the coming years. In 2013, the CT utilization rate was lower than MDCT and SDCT at 1,500 examinations/system. The adoption rate for MRI was the second-lowest in the country. For both CT and MR systems, the adoption was about 1/3 of the mean of foreign countries and near the bottom. The number of CT annual examinations per 1,000 population in Japan was the sixth among 17 countries, and that of MR examinations was the fourth worldwide. Although Japan witnesses a high number of diagnostic examinations, the number is not impressive considering the high number of systems. In the future, the rise in the volume of medical systems will drive the market during the forecast period.

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Exhibit 84 Japan Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Japanese mobile medical imaging services market was valued at \$47.29 million, which is expected to grow at a CAGR of 4.66% to reach \$62.15 million by 2027.

17.5.3 India: Market Size & Forecast

In 2021, India accounted for a revenue share of 11.7% in the APAC mobile medical imaging services market. Factors such as the surge in the prevalence of chronic diseases, the rise in the adoption of advanced technologies in medical imaging devices, and the expansion of the geriatric population are major growth drives for the Indian market. The surge in the prevalence of chronic diseases such as cancer, cardiovascular diseases, gastrointestinal disorders, and various genetic mutations requiring advanced imaging equipment will propel the demand for diagnostic imaging equipment. The rise in healthcare expenditure, technological advances, healthcare spending, and government initiatives worldwide are other drivers for the Indian mobile imaging devices and services market.

The surge in public spending on medical development has contributed to the growth of the Indian market. Furthermore, the introduction of health screening packages and attractive offers, especially on Women's Day, World Cancer Day, and Breast Cancer Awareness Month, are expected to drive market growth in the coming years. Additionally, initiatives by mobile imaging devices and services and equipment suppliers for effective diagnostics to provide adequate treatment and quality of care at optimal cost will create lucrative opportunities for market growth during the forecast period. Factors such as the surge in healthcare expenditure, technological advances, the rise in government initiatives worldwide, and spending on healthcare are other growth drivers for the market.

The country has a considerably large population, which has propelled the demand for imaging and diagnosis equipment due to the high prevalence of various chronic conditions that require an early and accurate diagnosis. Other growth drivers for the market include high healthcare expenditure, the launch of advanced diagnostic devices, and the fusion of imaging technologies.

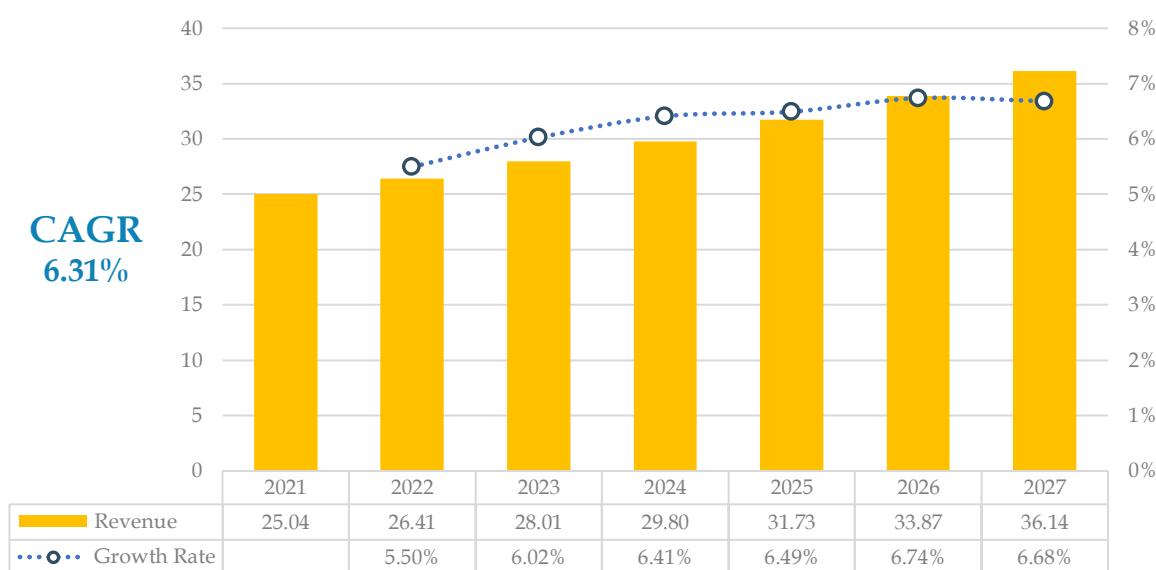
India faces an acute shortage of trained radiologists, with only an estimated 10,000 professionals available in the system. The number of hospitals and diagnostic centers witnessed a considerable surge across the country, which has fueled the demand for radiology professionals. Currently, in India, the number of radiologists is ten times lower than that across the US. There is an urgent need to alter these dynamics and increase the number of radiologists, and therefore, the country plans to at least quadruple the number of seats for radiologists in medical colleges every year.

The surge in the aging population across the country is expected to propel the growth of the Indian healthcare sector. Major challenges in the Indian healthcare sector include the rise in cost pressure, enhanced quality, and time efficiency. Diagnostic experts and radiologists require access to advanced diagnostic imaging tools, which can handle large volumes of medical data quickly and accurately. The rise in the integration of digital imaging technologies with breakthrough computer vision, especially in radiology, will drive market growth. AI is expected to play a major role in the development of diagnostic imaging and address major challenges in the healthcare sector.

India has emerged as a popular medical device manufacturer. Major reasons leading The country has emerged as an ideal base for medical equipment include the presence of skilled resources, cost-effective operations, government support for the Medtech industry, sensitivity to intellectual property rights, and a robust ecosystem to support production. The country supports a higher number of exports compared to many other countries in the APAC region. With a strong medical device exporting base, higher advances in medical devices are likely to be adopted by the manufacturers, which will fuel the development of high-end medical imaging equipment.

Thus, all these factors will contribute to the demand and penetration of mobile imaging services in the country and accelerate the market growth.

Exhibit 85 India Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Indian mobile medical imaging services market was valued at **\$25.04** million, which is expected to grow at a CAGR of **6.31%** to reach **\$36.14** million by 2027.

17.5.4 Australia: Market Size & Forecast

In 2021, Australia accounted for a revenue share of 10.1% in the APAC mobile medical imaging services market. Factors such as the increase in the incidence of chronic illness among the elderly population, high hospitalization rates, demand for the latest medical imaging techniques, high healthcare expenditure, and the surge in the adoption of healthcare medical devices are expected to drive market growth. Australia has about 2,000 radiologists serving a population of more than 24 million people. Currently, the demand for radiologists is high, and in the future, more radiologists will be required across the country, which is mainly attributable to the high adoption rate of diagnostic imaging systems and high demand for timely and accurate treatment.

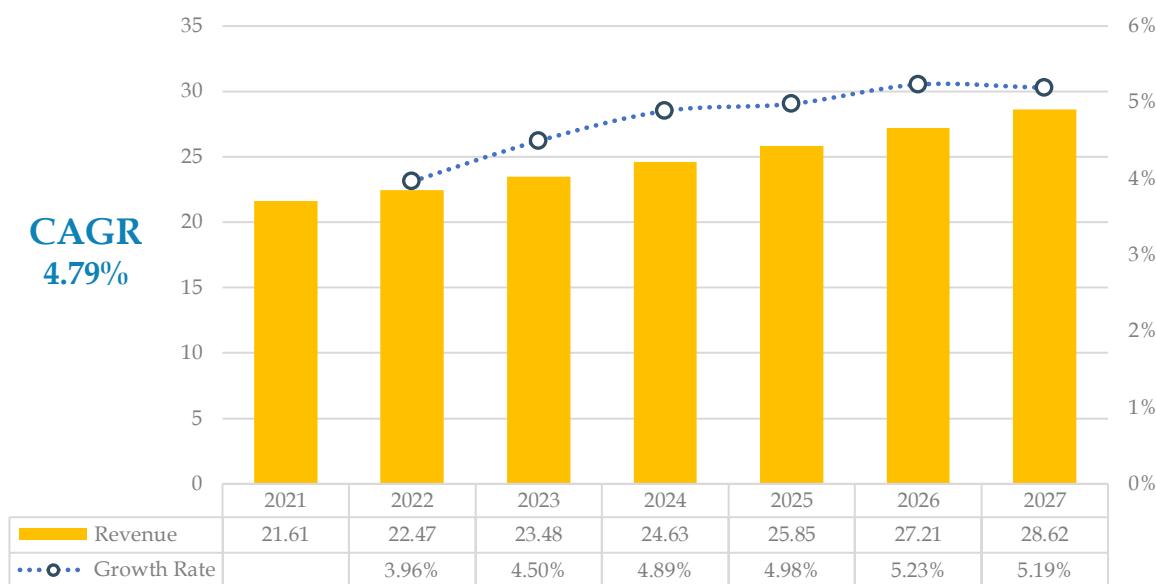
Furthermore, there is a relatively equal spread of machines per capita across different Australian states and territories across most modalities. For example, there are 28 CT machines in the Australian Capital Territory (6.9 units per 100 000 residents) and 562 CT machines in New South Wales (7.3 units per 100 000 residents). With the surge in demand for diagnostic imaging services, the availability of imaging systems is likely to increase in the future. In 2019, Australia was placed thirteenth in terms of economic and GDP growth. In the same year, the country was placed 19th and 23rd in terms of total exports and imports, respectively. In 2020, Australia's medical device imports exceeded \$4 billion. In the same period, exports were estimated to amount to over \$1.5 billion. This shows the increasing demand for imaging systems and is likely to increase in the future and contribute to the market share in the APAC region.

The Australian medical devices and diagnostic industry has witnessed exponential growth over the years. There has been a considerable surge in the pace of the development of digital health technologies and devices using advanced materials, robotics, imaging, IT, design, and adaptive diagnostic technology platforms. Factors such as a robust regulatory and funding system have supported the growth of the Australian healthcare system. Additionally, competitive R&D tax incentive schemes and a world-class healthcare system have created a highly favorable environment for innovation, investment, and collaboration in the country. Technological advances in portable x-ray and vertical MRI machines and a surge in R&D initiatives to develop advanced medical imaging equipment are expected to drive market growth.

Additionally, an increase in chronic diseases and an increase in government funding for research through diagnostic imaging are also responsible for the growth of the market. According to the Australian Department of Health, between 2017 and 2018, healthcare professionals performed approximately 27 million diagnostic examinations using Medicare-covered equipment. Diagnostic images play an instrumental role in accurate diagnoses by acquiring clear images of the internal organs using electromagnetic waves. There are many different medical imaging techniques, which include the commonly used computed tomography and MRI systems. The increase in the rate of fractures is expected to be a key driver for the market. For example, in 2016, approximately 85,509 people over the age of 50 were hospitalized with minimal traumatic fractures. The growing demand for radiography technicians in Australia is also expected to drive the growth of the mobile medical imaging services market in Australia.

The diagnostic imaging market in Australia is expected to grow steadily over the forecast period. Coronary artery disease, lung cancer, and musculoskeletal disorders are just some of the most commonly observed and prevalent diseases that specifically affect the Australian population. Therefore, the need for early detection and diagnosis of these diseases to provide timely treatment and drugs is expected to drive market growth through 2025. Additionally, discounts on healthcare and the introduction of cardiac and prostate MRI in healthcare are expected to drive the market in the next few years. Furthermore, technological advances and the development of mobile diagnostic imaging solutions are expected to create lucrative opportunities for market growth during the forecast period.

Exhibit 86 Mobile Medical Imaging Services Market in Australia 2021–2027 (\$ million)



Source: Arizton

In 2021, the Australian mobile medical imaging services market was valued at \$21.61 million, which is expected to grow at a CAGR of 4.79% to reach \$28.62 million by 2027.

17.5.5 South Korea: Market Size & Forecast

In 2021, South Korea accounted for a revenue share of 8.2% in the APAC mobile medical imaging services market. Like Japan, South Korea has a constantly growing aging population and a high prevalence of chronic conditions, which has propelled the adoption of mobile medical imaging systems. Advances in diagnostic imaging will propel the adoption of mobile medical imaging services and fuel the growth of the South Korean market.

The growing demand for radiologists in the country is attributable to the shortage of radiologists, and therefore, teleradiology has become widespread and commercially available since 2008. Unlike other countries, where teleradiology mainly covers after-hours work, teleradiology in South Korea is mainly used in general hospitals with a small number of radiologists to get reimbursement for diagnostic imaging examinations. Some teleradiology services also enable radiologists to perform ultrasound examinations. The low availability of teleradiologists in South Korea is because most hospitals prefer to save money by outsourcing radiology procedures and not hiring radiologists.

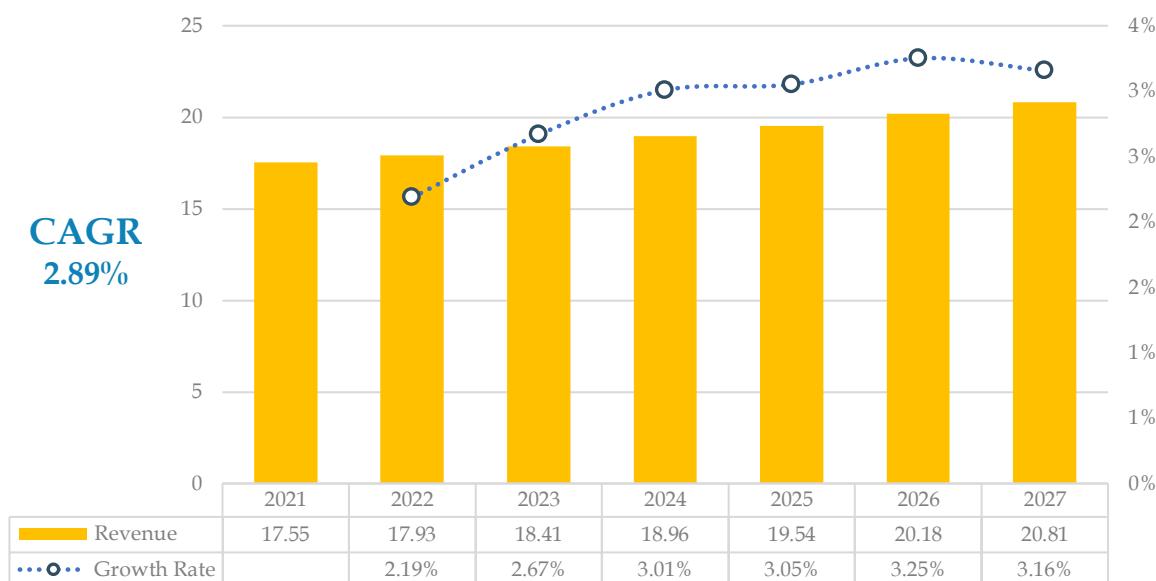
The rise in obsolete medical equipment being used in the country has propelled the demand for advanced medical devices. In 2005, of the 4,236 medical imaging units being used in the country, 3,773 underwent quality inspection, which included 1,630 mammography, 1547 CT, and 596 MRI units. The number of obsolete imaging units manufactured more than ten years ago or with an unknown manufacturing date was 1760 (47%) in 2005 and 1535 (38%) in 2006. The failure rate of second-hand or obsolete equipment was much higher than that of new equipment.

The high prevalence of cancers and cardiovascular diseases is a major growth driver for the South Korean mobile medical imaging services market. According to the Korea Cancer Research and Development Institute, a total of 221,347 new cancer cases were reported in 2019, with men (120,352) having a higher incidence than women (100,995). In addition, the rise in technology development of PET or SPECT imaging at the same time as radionuclide/radiopharmaceutical treatment is expected to drive the growth of the mobile medical imaging services market in South Korea.

According to the Ministry of Food and Drug Safety (MFDS), the market size for the medical devices in South Korea has doubled since 2010. In 2018, the country's medical devices sector was ranked 9th in the world and accounted for a revenue

share of \$6.2 billion. In the same year, the country's medical device imports from the US increased from 0.9 billion in 2010 to \$1.8 billion in 2018. Also, nearly 80% of South Korean medical device manufacturers are small- and medium-sized enterprises (SMEs) with less than \$1 million in revenue. Thus, new product launches by several vendors are likely to increase the number of imaging systems in the coming years and drive the market during the forecast period.

Exhibit 87 Mobile Medical Imaging Services Market in South Korea 2021–2027 (\$ million)



Source: Arizton

In 2021, the South Korean mobile medical imaging services market was valued at **\$17.55** million, which is expected to grow at a CAGR of **2.89%** to reach **\$20.81** million by 2027.



LATIN AMERICA

18 LATIN AMERICA

18.1 MARKET OVERVIEW

The adoption of digital and mobile radiation devices gained momentum in Latin America during the COVID-19 pandemic as they were being increasingly adopted by healthcare professionals. During the COVID-19 pandemic, Latin American healthcare providers faced a new challenge of providing medical images to their patients. One of the major challenges is the introduction of new digital technologies to support telemedicine, especially by elderly individuals who have a lot of experience in analog technology. The process of aging is often associated with an increased risk of chronic disease and the development of bone and muscle weakness. Medical institutions use mobile imaging as a contribution to patient care. Transferring a critically ill patient to a radiology department can cause complications for the patient. According to the International Journal of Critical Illness & Injury Science, transport complications are a potential risk to the respiratory system, hemodynamics including loss of intravenous access, trauma, acid-base homeostasis, glucose regulation, infection, and risk of death. By providing diagnostic imaging technology directly at the bedside, the risk of patient movement is eliminated. It also eliminates the need for transportation staff to take care of other patients in the facility. Infection control has always been a problem in healthcare and is becoming even more serious today with the advent of COVID 19. Bedside patient images help prevent the spread of infections that can occur during the patient's transport. The stimulus behind the rise of mobile imaging is its role in providing rapid diagnosis. A portable x-ray device can capture a patient's bedside imaging in much less time than transporting the patient to the x-ray room. Images can be instantly viewed by the doctor on the device console.

Companies in Latin America play a vital role in enhancing the market penetration in the region. For instance, Resonandina Holanda BV is a mobile imaging solution in Latin America. The company provides high-end technology turnkey imaging services such as MRI, CT scan, PET-CT scan, and interventional radiology such as Cardio & Neuro for hospitals, diagnostic centers, and radiologists. The Director of Resonandina said Latin America requires an estimated 2,500 MRI units. The companies in Latin America are intended to develop a positive impact on health in

urban and remote areas. However, strict controls have been introduced across Latin America to enable the import of used medical diagnostic equipment. Many companies are investing in marketing strategies to drive the adoption of mobile imaging solutions across Brazil. The development initiatives are increasing the demand for these technologies and are therefore driving the growth of the mobile imaging services market throughout Brazil during the forecast period.

The mobile medical imaging services market is driven by changes in the healthcare sector, where many private companies have entered to take advantage of the growing healthcare market in applications such as radiography, ultrasound, MRI, and nuclear medicine. Mexico is driving the growing demand for mobile imaging solutions to several key factors, especially the increase in chronic diseases such as cancer. The growing demand for advanced medical services and facilities has led hospitals and other medical facilities to adopt technologically advanced medical equipment. The improved redemption policies are a key driver of demand for mobile imaging technology, which is driving the growth of the mobile imaging solutions market across the region.

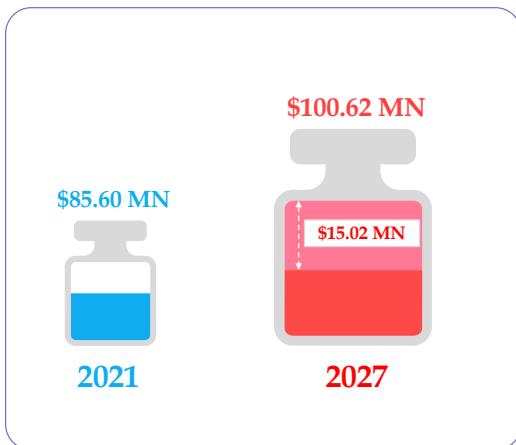
Exhibit 88 Latin America Mobile Medical Imaging Services Market: Key Countries (\$million)



Source: Arizton

Exhibit 89 Latin America Mobile Medical Imaging Services Market: Incremental & Absolute Growth

INCREMENTAL GROWTH



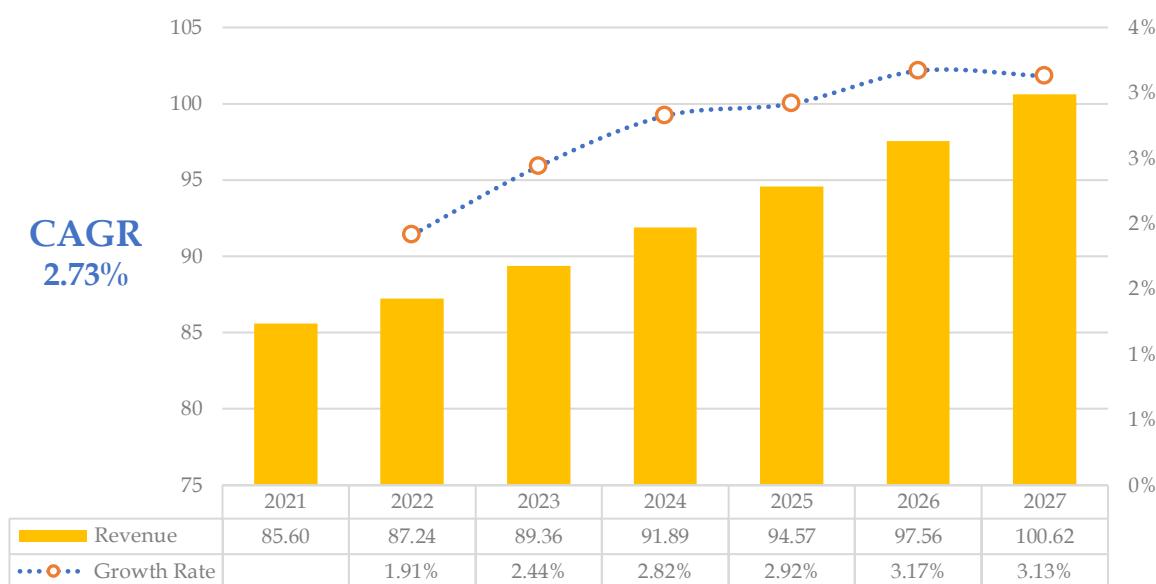
ABSOLUTE GROWTH



Source: Arizton

18.2 MARKET SIZE & FORECAST

Exhibit 90 Latin America Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Latin America mobile medical imaging services market was valued at \$85.60 million, which is expected to grow at a CAGR of 2.73% to reach \$100.62 million by 2027.

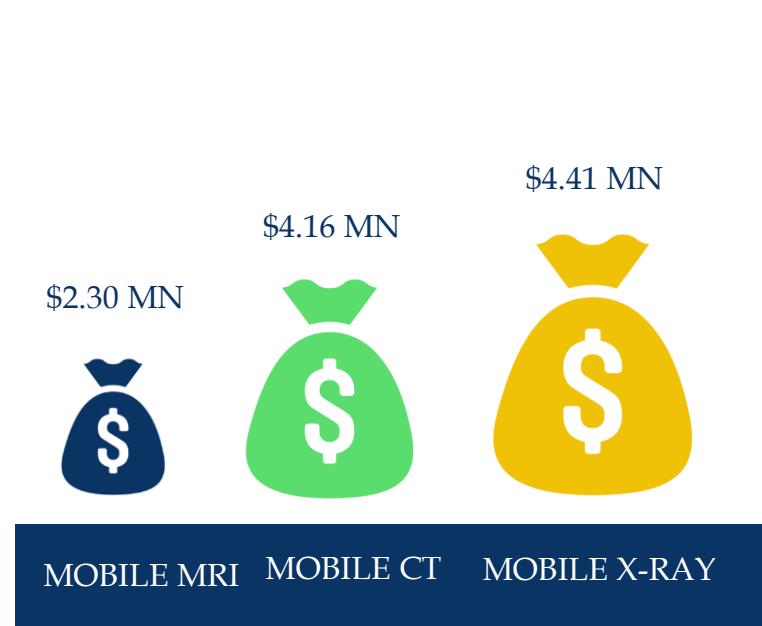
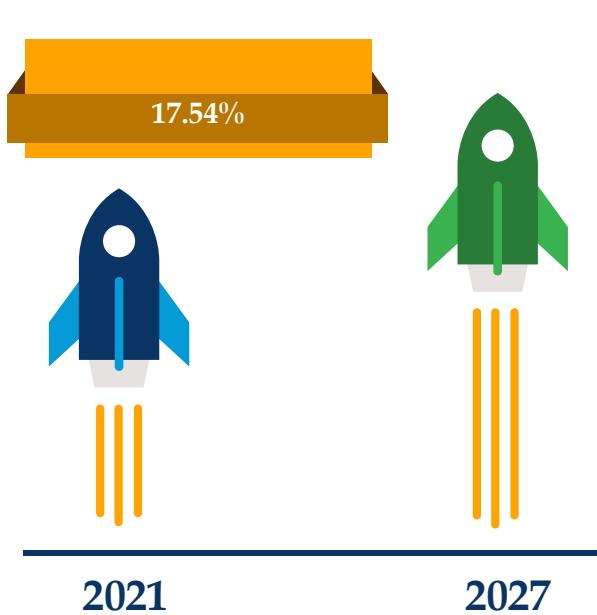
18.3 LATIN AMERICA: TYPE SEGMENTATION

Exhibit 91 Incremental Growth By Service Type 2021 & 2027

PRODUCT	2021	2027	CAGR
MOBILE X-RAY	\$20.54 MN	\$24.95 MN	3.29%
MOBILE CT	\$16.26 MN	\$20.42 MN	3.87%
MOBILE ULTRASOUND	\$14.81 MN	\$17.10 MN	2.43%
MOBILE MRI	\$9.59 MN	\$11.97 MN	3.77%
MOBILE EKG	\$7.88 MN	\$8.65 MN	1.58%
OTHERS	\$16.52 MN	\$17.51 MN	0.97%

ABSOLUTE GROWTH

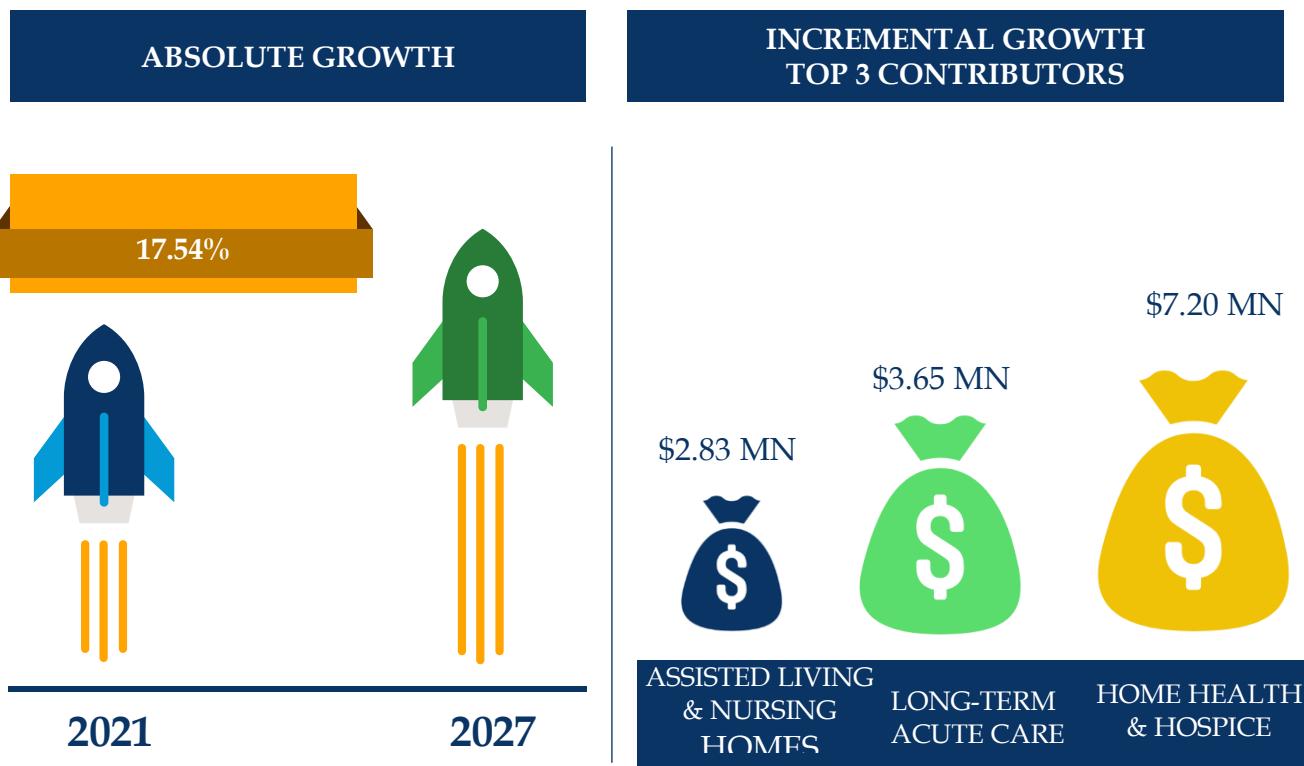
INCREMENTAL GROWTH TOP 3 CONTRIBUTORS



18.4 LATIN AMERICA: END-USER SEGMENTATION

Exhibit 92 Incremental Growth by End-User 2021 & 2027

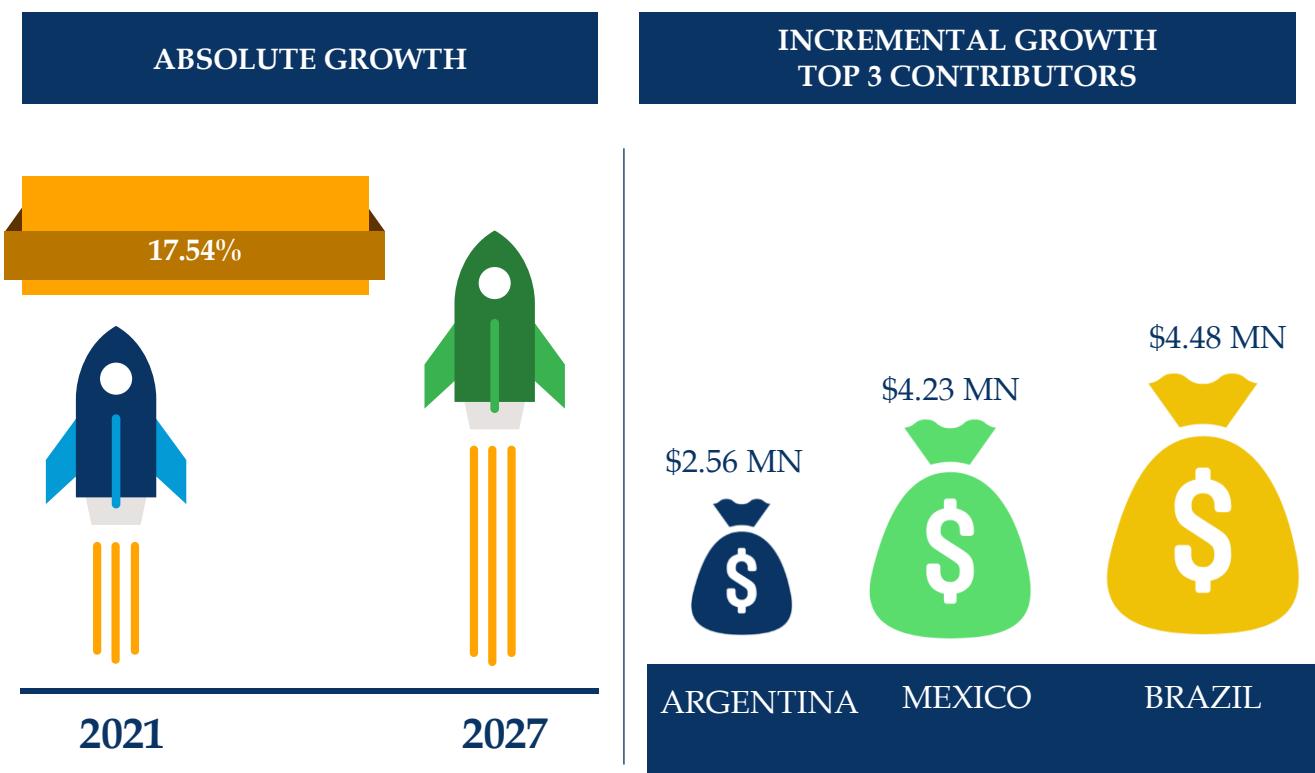
END-USER	2021	2027	CAGR
ASSISTED LIVING & NURSING HOMES	\$18.40 MN	\$21.23 MN	2.41%
HOME HEALTH & HOSPICE	\$29.02 MN	\$36.22 MN	3.76%
LONG-TERM ACUTE CARE	\$21.40 MN	\$25.05 MN	2.66%
OTHERS	\$16.78 MN	\$18.11 MN	1.28%



18.5 KEY COUNTRIES

Exhibit 93 Incremental Growth in Latin America by Key Countries 2021 & 2027

COUNTRY	2021	2027	CAGR
BRAZIL	\$26.02 MN	\$30.51 MN	2.69%
MEXICO	\$21.83 MN	\$26.06 MN	3.00%
ARGENTINA	\$15.15 MN	\$17.71 MN	2.63%



18.5.1 Brazil: Market Size & Forecast

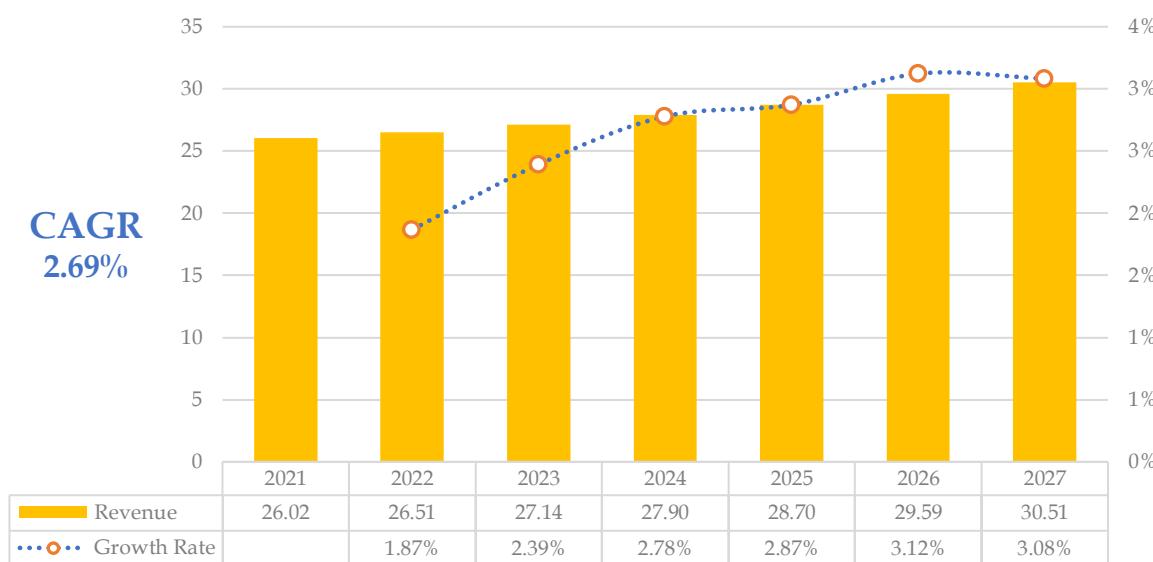
In 2021, Brazil accounted for a share of 30.4% in the Latin America mobile medical imaging services market. The country witnesses increase in aging populations along with higher hospitalization rates due to prevalence of chronic conditions and diseases. It also has an increased demand for medical imaging systems with advancements in diagnostic imaging through digital techniques which will boost the market growth in the coming years. In Brazil, the largest distribution of radiologists is found in the larger population centers of the southeast portion of the country. In São Paulo, there are 10 radiologists per every 100,000 inhabitants, while in the northern part of the country, there is less than three radiologists per every 100,000 inhabitants. With growing demand for radiological examinations, it is getting difficult to attract radiologists into remote areas due to lower salaries, increased isolation and fewer professional opportunities. Therefore, the demand for teleradiology is likely to increase in the coming years. The evolution of the CT scanner rate by the state populations in Brazil has increased in recent years. In 2017, a total of 4,739 CT scanners were estimated throughout Brazil, representing an average of 22.81 CT scanner per million. This amount of working CT scanners working represents an oversupply. With increase in hospital admission rates, the demand for imaging equipment is likely to increase which will increase the usage of such equipment and boost the market growth.

Brazil is the largest medical equipment market in South America. Medical equipment revenues in 2018 reached an estimated \$10.5 billion. According to the World Bank, in 2018 private and public healthcare expenses in Brazil corresponded to 9.1% of GDP. The US accounts for approximately 29% of the import market in Brazil. In 2018, imports of medical devices were \$5.4 billion, with a growth of 21.8% from the previous year. High number of medical imaging system export occur in the country due to the growing demand of their usage. Diagnostic imaging also enables the early diagnosis of disease and greatly improves patient survival. The medical imaging industry has revolutionized everything from bedside monitoring to advanced digital scanning. Therefore, all these factors are expected to drive the overall growth of the market. Advances in technology and an increasing number of chronic diseases are the main factors contributing to the growth of this sector. Brazilian hospitals increased the number of X-ray machines by 12% in 2017, according to the Brazilian Association for Health Innovations. The Brazilian plant established by GE Healthcare

is designed for manufacturing X-ray and mammography equipment and modern mobile imaging devices and services. July 2015, Konica Minolta, Inc. Brazil-based X-ray equipment manufacturer Sawae Technologica was acquired through Brazilian sales company Konica Minolta Healthcare do Brazil to improve diagnostic imaging in Brazil. The rise of orthopedic diseases and cancers, favorable government initiatives and investments, the advantages of digital X-ray systems over traditional X-rays, technological advances, and product developments. According to the World Health Organization (WHO), chronic diseases account for about 72% of all deaths in Brazil each year. According to a study published in The Lancet, Brazil suffers from a chronic non-communicable disease. Neuropsychiatric disorders are the leading cause of chronic disease burden in Brazil, with approximately 10-20% of people experiencing depression. Cancer is the second leading cause of death in Brazil after heart and cerebrovascular disease.

The emerging AI-based digital X-ray systems are expected to provide a wide range of growth opportunities for players during the forecast period. In May 2018, Siemens Healthineers worked with Screen Point Medical to develop an artificial intelligence application for breast imaging. Major players are developing advanced handheld technology and battery-powered handheld x-ray machines to meet the needs of doctors. Manufacturers are investing heavily in partnering with other players to expand their portfolios.

Exhibit 94 Brazil Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Brazilian mobile medical imaging services market was valued at **\$26.02** million, which is expected to grow at a CAGR of **2.69%** to reach **\$30.51** million by 2027.

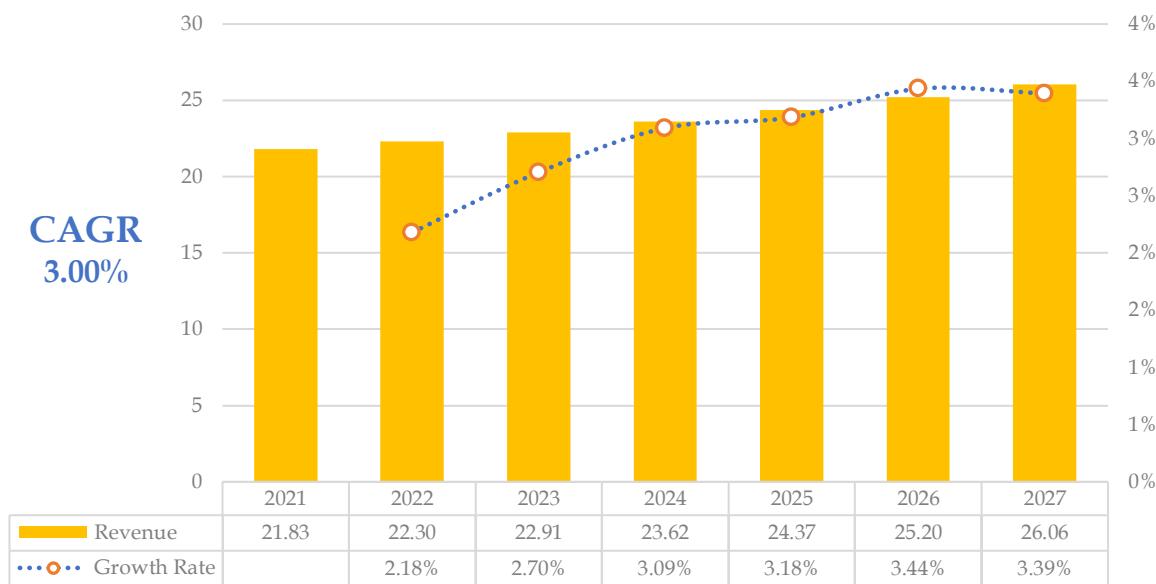
18.5.2 Mexico: Market Size & Forecast

In 2021, Mexico accounted for a share of 25.5% in the Latin America mobile medical imaging services market. Mexico has emerged as a medical tourism destination, and the country's health care is said to be comparable to that of the US. Advanced medical technology and highly trained doctors contributed to the advancement, supported by the Mexican Association of Radiologists and the Mexican Federation of Radiologists.

The mobile medical imaging services offers many benefits, including accurate and high-quality imaging, flexibility in image management, accurate imaging and data evaluation, reduced radiation exposure, and improved patient care. These factors have made mobile medical imaging more popular. The increasing demand for digital radiography equipment has intensified competition and lowered prices. Mobile medical imaging services are more accessible and widely used. R&D expansion in Mexico along with government initiatives has further developed the Mexican mobile medical imaging services market.

However, although mobile medical imaging has become more and more popular in recent years, the initial setup and cost are very high. This limits penetration into small clinics and medical centers and limits the overall market growth. As the elderly population in Mexico is expected to increase in the future, the demand for diagnostic imaging is increasing. The elderly population is more susceptible to illness and disease. Therefore, the prevalence of chronic diseases is expected to increase in Mexico. These are the key factors driving the growth of the diagnostic imaging market in Mexico. Additionally, technological advances and the speed of adoption of new technologies have contributed to the growth of the Mexican market as cancer is one of the leading causes of death in Mexico. Additionally, , the incidence of chronic diseases in Mexico is projected to increase in the future. Therefore, the demand for mobile imaging devices and services is expected to increase.

Exhibit 95 Mexico Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Mexican mobile medical imaging services market was valued at \$21.83 million, which is expected to grow at a CAGR of 3.00% to reach \$26.06 million by 2027.

18.5.3 Argentina: Market Size & Forecast

In 2021, Argentina accounted for a share of 17.7% in the Latin America mobile medical imaging services market. With the growing elderly population in Argentina the prevalence of chronic disease and illness is also anticipated to increase in the near future as older people are more susceptible to illness and disease. This is the main factor contributing to the growth of the diagnostic imaging market in Argentina. Technological advances and the growing rate of adoption of new technologies by the country also contributed to the growth of the Argentine market. However, the high cost of equipment and procedures and public concerns about the side effects of radiation are hindering the market growth.

Argentina has constantly growing aging population with high prevalence of various chronic illness that led to increase in hospitalization rates and thereby increase the demand for medical imaging. This is boosting the growth of market across the country. Other factors include increased medical awareness, development of advanced imaging techniques, healthcare expenditure, growth in digital imaging and computer aided diagnosis.

Like many countries, Argentina also witnesses lack of radiologists which is increasing the workload on physicians. In 2013, there are approximately 4000 radiologists in Argentina. With increasing demand for medical imaging, the requirement of radiologists has increased. Many radiologists either shift to other countries or enter into private practise. This has decreased the number of available radiologists required in the healthcare settings. With the demand for diagnostic imaging growing at a faster rate than the supply of radiologists, radiology groups, imaging centers and hospitals are increasingly becoming reliant on outsourcing their diagnostic reporting workload.

The medical device market in Argentina is dominated by imports, which are majorly from the US, followed by China, Germany, and Japan. The growth in the medical device sector significantly depends on general economic growth and overall investment. Healthcare expenditures in Argentina account for approximately 9% of the GDP, among the highest in the region. Imports in the medical equipment and device sector have been estimated to account for around 70-75% of the total market. As there is a high demand for medical devices and imaging equipment, high number of imports will combat the growing need.

Exhibit 96 Argentina Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Argentina mobile medical imaging services market was valued at **\$15.15** million, which is expected to grow at a CAGR of **2.63%** to reach **\$17.71** million by 2027.



MIDDLE EAST & AFRICA

19 MIDDLE EAST & AFRICA

19.1 MARKET OVERVIEW

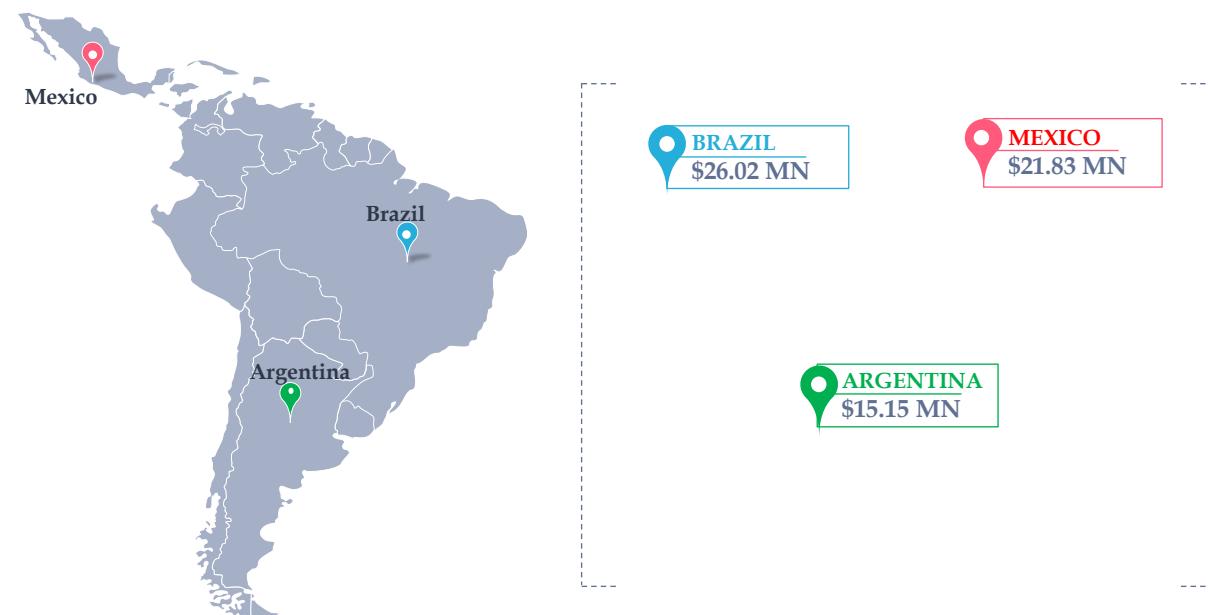
Several factors, including acute health care challenges and the surge in aging and regular populations, are expected to drive the adoption of mobile medical imaging solutions in the Middle East and Africa. Several governments and other organizations are adopting advanced technologies to drive the development of the Middle East and Africa mobile imaging services market. Most governments in the region spend a significant portion of their budget on the healthcare sector, which will drive market growth during the forecast period. Therefore, such factors are motivating the growth of the mobile imaging services market throughout Saudi Arabia. For example, the UAE is one of the region's major markets due to its technologically advanced resources and growing awareness of the importance of medical imaging services in healthcare. Over the years, the national health sector has undergone a major revolution, with an increasing number of private and public hospitals. According to the Annals of Oncology, the proportion of the population aged 65 and above in the Middle East and North Africa (MENA) is estimated to be 4.7% of the total population of 336 million. . The Middle East & Africa has a geriatric population that is expected to grow exponentially by 2030. The population of individuals aged 65 and above is less than 2% and 10% in the UAE and Lebanon, respectively.

South Africa has an advanced healthcare sector compared to other African countries. The market is regulated by the Medical Device Manufacturers of South Africa (MDMSA), which includes more than 160 companies operating in the medical devices manufacturing sector. The region is concentrating on developing medical devices to reduce dependence on foreign countries in the healthcare sector. Many other players such as Shimadzu Middle East & Africa FZE, GE Healthcare, and many more are also contributing to the growth of the regional market. For instance, on January 27, 2020, GE Healthcare unveiled 30 plus new smart applications and smart imaging devices at Arab Health 2020. These applications and devices are designed to improve efficiency, minimize costs, and double the productivity of clinics and hospitals by 2025. Many mobile X-ray systems are equipped with a tripod with wheels, and some are electrified to help technicians transport the X-ray system

quickly and easily. For instance, the new digital mobile X-ray system launched by Canon Medical in August 2020 is equipped with advanced technology that can streamline bedside examinations and improve medical imaging workflows and productivity. In addition, the system provides safety features such as anti-collision technology and pressure-sensitive control for safe imaging.

There has been a considerable surge in demand for mobile medical imaging solutions for the early detection of various health conditions so that patients can receive timely treatment. A significant proportion of the growing elderly population in the region is likely to be affected by a variety of infectious and non-communicable diseases, and therefore, requires regular diagnosis to receive treatment. In addition, the rise in the health-conscious population across the region and a higher focus on disease prevention are expected to drive market growth. The penetration of major market players and the introduction of new products in the country will continue to create favorable opportunities for market growth during the forecast period.

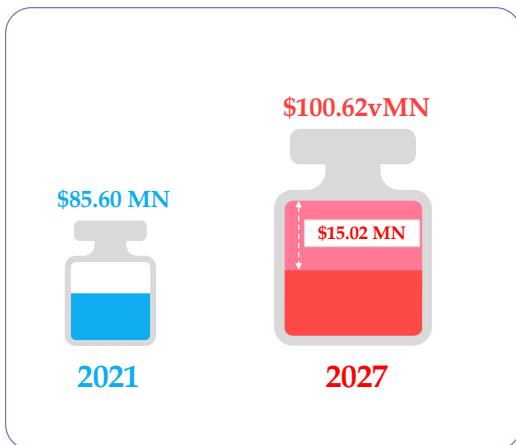
Exhibit 97 Middle East & Africa Mobile Medical Imaging Services Market: Key Countries (\$million)



Source: Arizton

Exhibit 98 Middle East & Africa Mobile Medical Imaging Services Market: Incremental & Absolute Growth

INCREMENTAL GROWTH



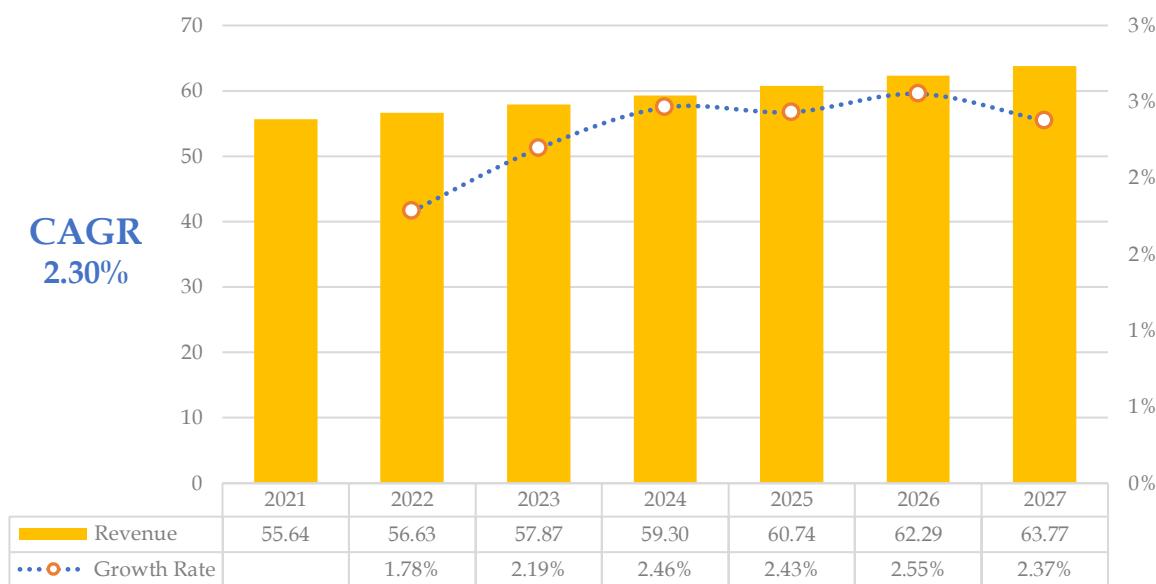
ABSOLUTE GROWTH



Source: Arizton

19.2 MARKET SIZE & FORECAST

Exhibit 99 Middle East & Africa Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Middle East & Africa mobile medical imaging services market was valued at \$55.64 million, which is expected to reach \$63.77 million by 2027, growing at a CAGR of 2.30% during the forecast period.

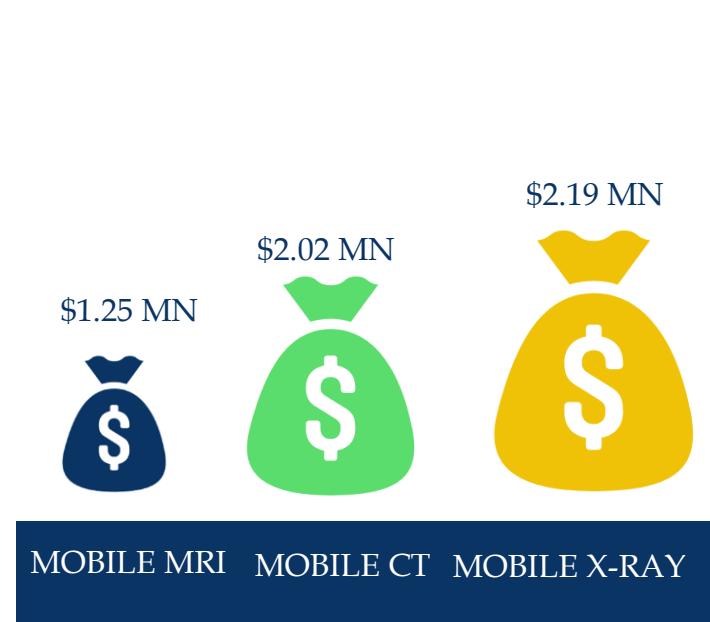
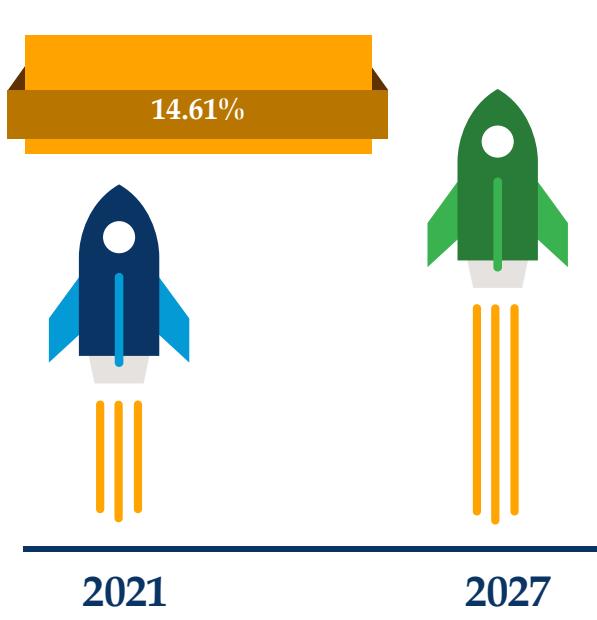
19.3 MIDDLE EAST & AFRICA: TYPE SEGMENTATION

Exhibit 100 Incremental Growth By Service Type 2021 & 2027

PRODUCT	2021	2027	CAGR
MOBILE X-RAY	\$13.69 MN	\$15.88 MN	2.51%
MOBILE CT	\$10.74 MN	\$12.75 MN	2.91%
MOBILE ULTRASOUND	\$9.46 MN	\$10.71 MN	2.10%
MOBILE MRI	\$6.18 MN	\$7.78 MN	3.92%
MOBILE EKG	\$5.23 MN	\$5.68 MN	1.37%
OTHERS	\$10.35 MN	\$10.97 MN	0.97%

ABSOLUTE GROWTH

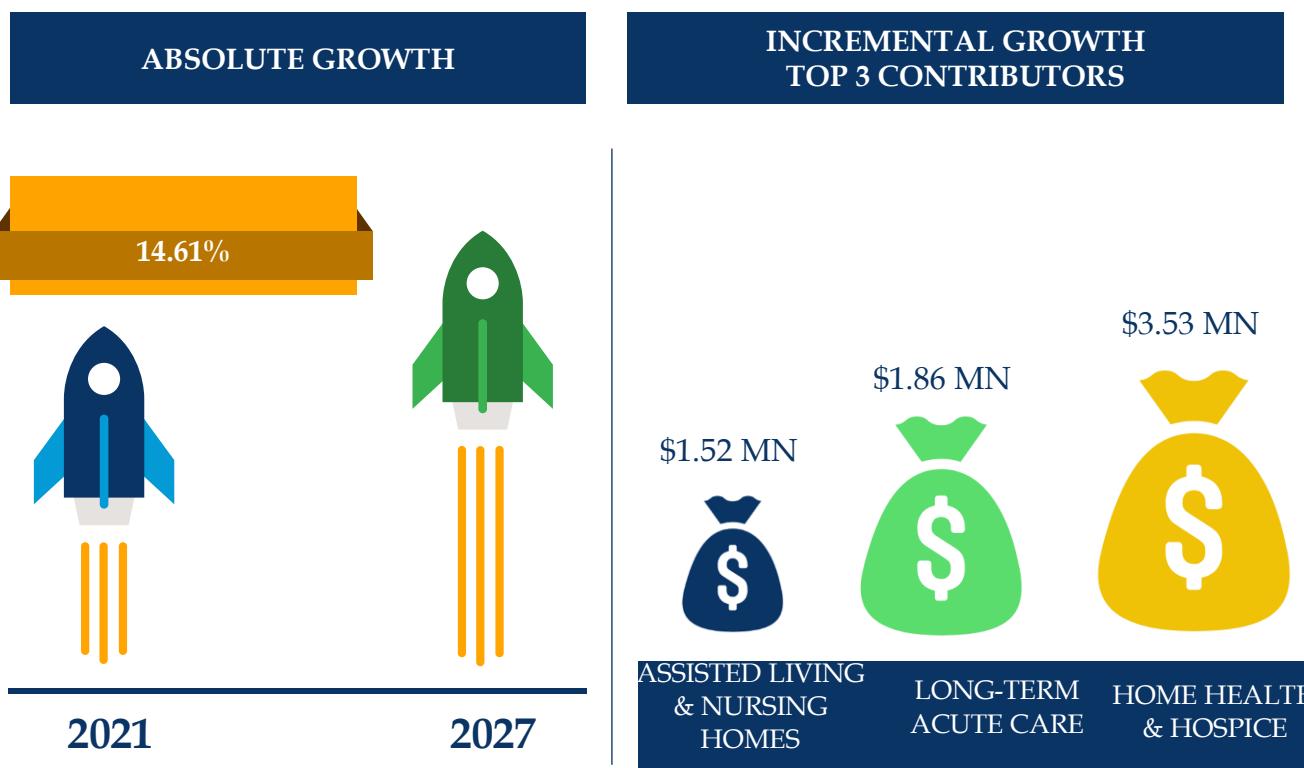
INCREMENTAL GROWTH TOP 3 CONTRIBUTORS



19.4 MIDDLE EAST & AFRICA: END-USER SEGMENTATION

Exhibit 101 Incremental Growth by End User 2021 & 2027

END-USER	2021	2027	CAGR
ASSISTED LIVING & NURSING HOMES	\$11.68 MN	\$13.20 MN	2.05%
HOME HEALTH & HOSPICE	\$18.92 MN	\$22.45 MN	2.89%
LONG-TERM ACUTE CARE	\$14.02 MN	\$15.88 MN	2.10%
OTHERS	\$11.02 MN	\$12.24 MN	1.78%

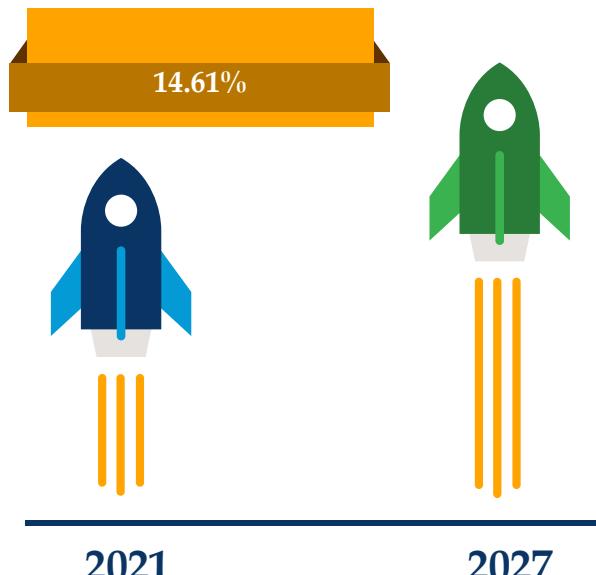


19.5 KEY COUNTRIES

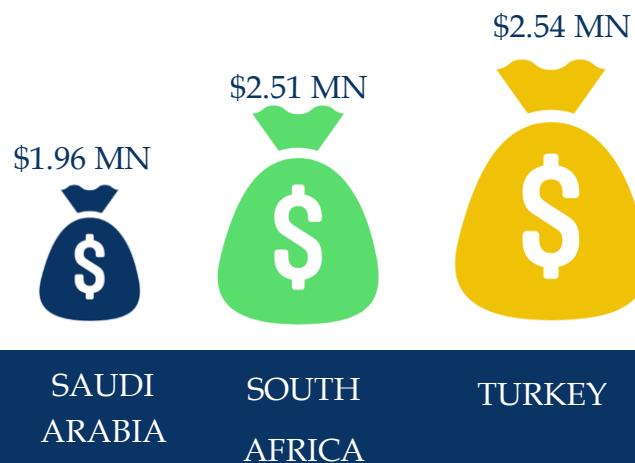
Exhibit 102 Incremental Growth in Middle East & Africa by Key Countries 2021 & 2027

COUNTRY	2021	2027	CAGR
TURKEY	\$15.63 MN	\$18.17 MN	2.54%
SAUDI ARABIA	\$12.52 MN	\$14.48 MN	2.45%
SOUTH AFRICA	\$10.63 MN	\$13.14 MN	3.60%

ABSOLUTE GROWTH



INCREMENTAL GROWTH TOP 3 CONTRIBUTORS



19.5.1 Turkey: Market Size & Forecast

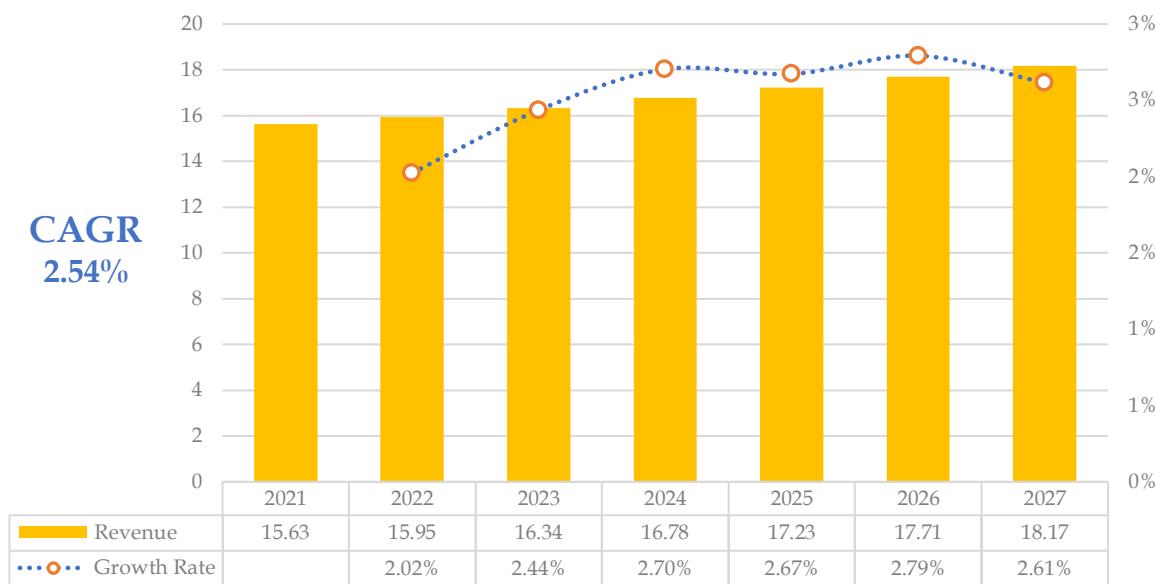
Turkey is witnessing a substantial surge in its elderly population along with a high prevalence of chronic conditions, and a rise in medical awareness. Also, the country has a high demand for imaging equipment, constant public and private expenditures, and technological advances in diagnostic imaging, which will contribute to the market growth.

Additionally, Turkey is leading in several areas of radiology following a series of health system reforms and government-led drives for the improvement of medical imaging. Radiologists in Turkey have developed the latest interventional techniques for accurate diagnosis and personalized treatment. The country has an exceptional imaging infrastructure where radiologists are using their experience to develop new diagnostic and interventional procedures.

Most radiologists are pressurized to interpret several images on a daily basis. The increasing usage of AI medical imaging will increase the volume of medical imaging procedures further in the coming years. Machine learning algorithms run through normal and abnormal results and identify suspicious findings. Deep learning methods help in detecting rare and difficult diagnoses as they are made up of huge datasets that contain images of diseases. Machine learning applications are used to screen examinations like chest CT or mammography. Therefore, the use of artificial intelligence in medical imaging will help physicians with better treatment and contribute to market growth.

Furthermore, Turkey has witnessed high adoption rates of diagnostic imaging systems. The number of CT scan examinations in Turkey increased between 2008 and 2017. In 2017, there were approximately 16.6 million CT scan examinations conducted. In 2016, approximately 15 million MRI scan examinations were conducted in the country. This has led to an increase in the usage of diagnostic imaging coupled with the integrated software utilized in such equipment. In the future, many advances in medical imaging are likely to enhance the adoption of mobile medical imaging services.

Exhibit 103 Turkey Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Turkish mobile medical imaging services market was valued at **\$15.63** million, which is expected to grow at a CAGR of **2.54%** to reach **\$18.17** million by 2027.

19.5.2 Saudi Arabia: Market Size & Forecast

Mobile imaging in Saudi Arabia is heavily influenced by factors such as the country's growing burden of chronic disease and a growing geriatric population. These factors are driving the growth of the Saudi Arabia market. Increasing elderly populations, decreasing birth rates, growing prevalence of chronic illness, demand for imaging and diagnostic systems, advancements in healthcare industry are the factors that will boost the growth of the market further in the coming years.

The demand for radiology is increasing especially with the high usage of X-rays, CT scanners, MRIs, and ultrasound. These are largely utilized due to rising prevalence of certain diseases, demographic shifts, new diagnostic guidelines, patient-generated shifts and technological advancements. With the increase in demand for healthcare, a major challenge involving shortage of radiologists has evolved. There is increase demand for interventional radiologists in most of the hospitals all over the country, especially in the small peripheral cities. The growth in radiology workforce is not keeping up with the demand made on radiology services. The government is encouraging more students to explore this field and increase awareness for future collaboration with other specialities.

The number of healthcare facilities in Saudi Arabia is increasing due to the growing hospitalization rates. In Saudi, there were 100 hospitals with 8,485 beds, accounting for about 19 percent of the total number of hospitals beds. The number of licensed medical facilities increased from 40% to 100%. This has increased the use of medical imaging equipment across the country. Growing number of healthcare settings are making people rely more on such medical facilities.

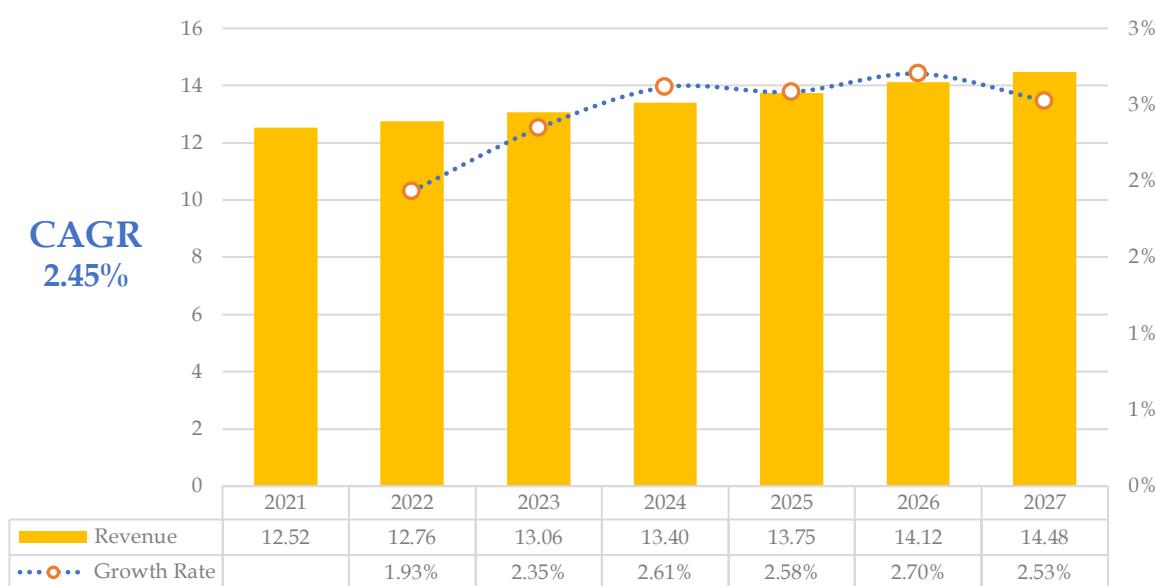
The medical device market in Saudi Arabia is totally dependent on imports of medical and imaging equipment. Imports of medical devices accounted for more than 98% of the market at \$1.8 billion, and American companies top the list of suppliers with a 21% share of total imports. High awareness of health issues and an increasing utilization of healthcare services sustains a strong market for mobile medical imaging services.

The mobile imaging service market in Saudi Arabia is expected to grow significantly during the forecast period due to the prevalence of chronic diseases such as cancer, diabetes, cardiovascular disease, kidney and gastrointestinal disorders. This, in turn, has increased the need for diagnostic imaging solutions for early diagnosis of disease

to ensure timely treatment of patients. In addition, major domestic companies are expected to enter the market and launch new products. It creates lucrative opportunities for market growth during the forecast period.

The growing penetration of multi-specialty hospitals and diagnostic centers in Saudi Arabia is also expected to drive market growth in the coming years. Also, advancements in digital technology adoption of non-invasive processes, among others, are expected to create lucrative opportunities for market growth during the forecast period.

Exhibit 104 Saudi Arabia Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the Saudi Arabian mobile medical imaging services market was valued at **\$12.52** million, which is expected to grow at a CAGR of **2.45%** to reach **\$14.48** million by 2027.

19.5.3 South Africa: Market Size & Forecast

In South Africa, the market for mobile imaging devices and services is growing with the burden of chronic diseases in the country and technological advances in diagnostic imaging. The chronic disease burden has been steadily increasing in South Africa. Imaging tests using radiography, ultrasound, fluoroscopy, and nuclear medicine create visual representations of the body's internal organs to help study and better understand Chronic diseases. Technological advancements in medical imaging are multiplying in the studied market. New imaging techniques revealing greater anatomical detail are available in most diagnostic laboratories and hospitals. Companies such as Aidoc and Nvidia allow their developers to apply a wide range of AI-based applications in existing medical imaging equipment. Therefore, technological advancements can help increase applications related to medical imaging.

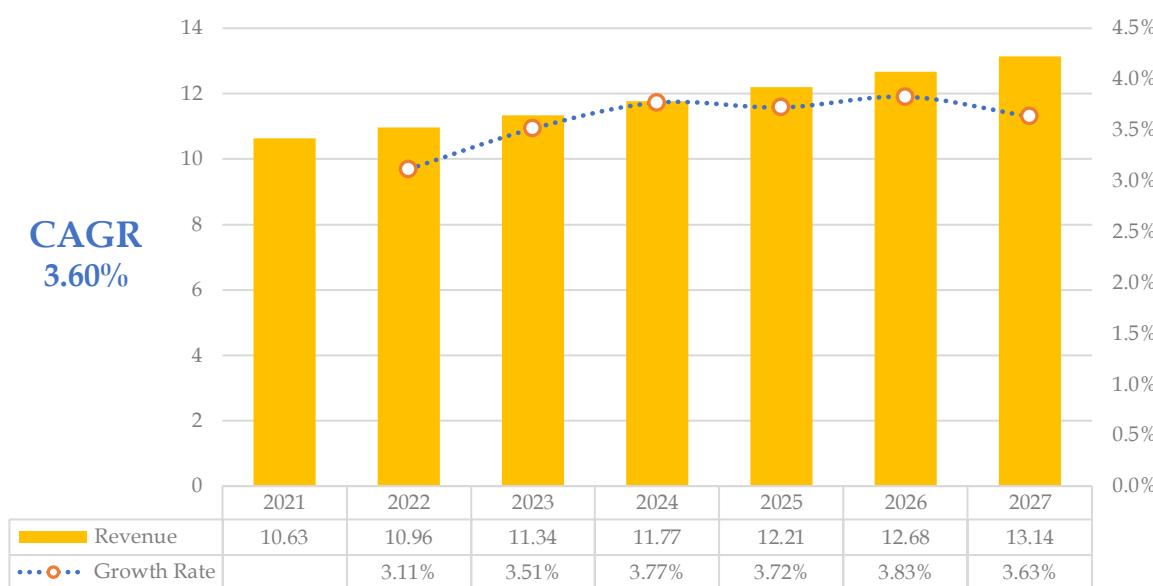
In South Africa, there is a high prevalence of chronic illness and infectious diseases which is increasing the utilization rate of diagnostic imaging systems. Increased demand for diagnostic techniques, growing medical awareness, healthcare expenditures, need for advanced imaging equipment has also contributed for the market growth.

South Africa has a great demand for medical imaging modalities with 19.6 units per million population which approximates the minimum recommended WHO standard of 20 general radiography units per million people. General radiography is the most accessed modality with 34.8 units per million population. It has 4.96 units per million of mammography imaging, 5 units per million of CT scanners. With high demand for imagine equipment and growing hospitalization rates in the country, the need for mobile medical imaging services will also witness a high demand.

The use of AI has widened in various medical fields and so is in radiology. For decades, medical images have been generated and archived in digital form. Now, breakthroughs in computer vision will open up the possibility for their automated interpretation. Radiologists are in demand to implement AI in the clinical medicine as they can adopt the role of using complex data analyses. In the coming years, radiologists will witness more competent AI applications.

The use of imaging technology for cancer detection and the use of imaging during treatment in South Africa is expected to increase with the projected increase in cancer incidence in the country. According to statistics from the International Agency for Research on Cancer in 2018, the number of cancer cases is expected to increase from about 107,000 to over 140,000 by 2030. These factors are expected to have a positive impact on the growth of the market in this country, promoting market growth in the region.

Exhibit 105 South Africa Mobile Medical Imaging Services Market 2021–2027 (\$ million)



Source: Arizton

In 2021, the South African mobile medical imaging services market was valued at \$10.63 million, which is expected to grow at a CAGR of 3.60% to reach \$13.14 million by 2027.



COMPETITIVE LANDSCAPE

20 COMPETITIVE LANDSCAPE

20.1 COMPETITION OVERVIEW

Factors such as improvements in healthcare infrastructure, the increase in the prevalence of chronic diseases, a rise in disposable incomes, a well-established presence of domestic companies, and a considerable surge in the geriatric population have enabled APAC to present profitable opportunities to key players in the global mobile medical imaging services market. Furthermore, the presence of several emerging economies, such as India and China, is likely to promote the expansion of Asia's mobile medical imaging services market. Furthermore, the implementation of several government initiatives to boost the number of community health and oncology facilities in developing regions is likely to broaden the reach of mobile medical imaging services.

Also, several strategic collaborations between service providers and medical imaging equipment manufacturers have had a particularly significant impact on the market. Recently, one of the major developments in the market is the acquisition of Professional Portable X-Ray (PPX), a mobile imaging company by Dispatch Health, an in-home medical care provider.

Many key players in the market have implemented strategic planning initiatives to uplift the market by promoting the use of their mobile medical imaging services. For instance, Atlantic Medical Imaging has announced the merger of its medical imaging division with Tilton Dynamic Imaging, a patient care and service provider based in New Jersey, the US. This merger will allow Atlantic Medical Imaging to improve the reach of its products among new patients, physicians, and healthcare service providers. The new locations for the combined practice of these two organizations include Atlantic, Ocean, Cape May, and Monmouth counties. In August 2020, Canon Medical Systems USA announced the launch of a new SOLTUS 500 Mobile Digital X-ray, which will provide hospitals access to a system with features that can speed bedside exams and assistance and increase workflow and productivity.

The market for mobile imaging services is highly competitive. The mergers, acquisitions, joint ventures, partnerships, and other such strategies are expected to drive market growth. For example, in May 2017, Alliance HealthCare Services announced the signing of an agreement with Red Rocks Radiation and Oncology.

This partnership is expected to enable Alliance HealthCare to provide the best quality of care and patient experience to the community and expand its product portfolio. Aging is usually associated with a higher risk of chronic diseases and weak bones and muscles. Also, older people are at a higher risk of developing a variety of diseases, such as orthopedic disorders, lung problems, and abdominal problems. The rapid surge in the aging population and the prevalence of geriatric diseases have enabled considerable market expansion.

Furthermore, the ongoing COVID-19 pandemic has propelled the growth of the global mobile imaging services market. For example, in April 2020, Carestream Health, a global provider of X-ray imaging systems, announced that it had increased the production of its portable diagnostic imaging systems, including the DRXRevolution Mobile Xray System and the DRXRevolution Nano Mobile Xray System, in response to the novel COVID-19 pandemic. Also, the rise in the prevalence of cardiovascular diseases is expected to drive market growth. For example, according to the 2019 American Heart Association Heart and Stroke Statistics update, approximately 48% of American adults had some form of cardiovascular disease in 2016. Mobile imaging technology requires frequent maintenance, which is expected to hinder the growth of the global mobile imaging services market. The trailer/vehicle/van may have high maintenance requirements in relation to the loads on the unit due to vibration, torque, shock, and lateral and vertical movement.

Additionally, the need to change the modality configuration will result in less flexibility to move mobile imaging devices between different objects, which is expected to limit the growth of the market. Integrated RIS/PACS integration requires each mobile scanner to be reconfigured to work in a separate hospital. Such factors will make the process difficult and time-consuming and impractical for day-to-day operations.

21 PROMINENT VENDORS

21.1 ALPHA ONE IMAGING

21.1.1 Business Overview

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. The company provides high-quality, affordable, portable radiology, ultrasound, and ECG services 24/7 throughout Louisiana. Also, the company provides mobile electrocardiograms, mobile ultrasound, and mobile x-ray services. The company provides services to nursing homes, home and palliative care settings, LTAC and rehabilitation centers, clinics, and occupational medical facilities.

Furthermore, the company is committed to providing customers with the highest quality, responsive mobile medical diagnostics in industrial settings, nursing homes, offices, physicians, retiree communities, adult residential settings, patient homes, home-based healthcare settings, and other healthcare facilities. The company's technicians are nationally registered and have extensive experience in mobile healthcare to ensure exceptional diagnostic quality.

21.1.2 Service Offerings

Table 4 Alpha One Imaging: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> › Mobile EKG › Mobile Ultrasound › Mobile X-ray

Source: Company Websites & Arizton

21.2 TRIDENTCARE

21.2.1 Business Overview

TridentCare 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 more than 5,000 of the country's 16,000+ long-term care facilities. The company has

partnered with digital imaging manufacturers and software providers to offer a comprehensive array of hospital-grade digital X-ray services. Also, the company's X-ray technologists are state-licensed and/or registered under the American Registry of Radiologic Technologists (ARRT). The company offers mobile diagnostics X-ray services to nursing facilities, assisted living centers, hospice providers, long-term care facilities, and home-bound patients.

21.2.2 Service Offerings

Table 5 TridentCare: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➤ Digital X-ray ➤ Ultrasound and EKG

Source: Company Websites & Arizton

21.3 COBALT HEALTH

21.3.1 Business Overview

Cobalt Health is a medical charity that uses cutting-edge technology to provide diagnostic imaging to support the NHS and other health care providers. Cobalt partners with Siemens Healthineers and Philips Healthcare to deliver services using the latest imaging technology. Cheltenham's Cobalt Imaging Center offers 3.0 Tesla and 1.5 Tesla MRI machines. Currently, the company is collaborating with the NHS to become the largest supplier of ultra-low-dose mobile CT scanners.

The company's imaging center provides NHS PET/CT services to residents of Gloucestershire, Worcestershire, and Herefordshire, and scans approximately 4,000 patients annually. The Siemens Biograph Vision digital PET/CT scanner will be installed in January 2022. Cobalt is working with the NHS to provide the community with images, including MRI and CT scans, to make community diagnostic centers available in select locations. The company provides mobile services to several NHS trusts and independent regional and community diagnostic centers across the UK and supports a comprehensive range of routine and sophisticated imaging services to meet individual needs and requirements.

21.3.2 Service Offerings

Table 6 Cobalt Health: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➢ MRI ➢ CT
	<i>Source: Company Websites & Arizton</i>

21.4 FRONT RANGE MOBILE IMAGING

21.4.1 Business Overview

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. The company provides permanent or temporary systems, MRI, CT, or PET/CT, and solutions to meet short- and long-term patient needs. Several companies, radiologists, hospital managers, and doctors have chosen Front Range Mobile Imaging as their national partner.

Headquartered in Wyoming, the US, the company specializes in mobile medical imaging, intermediate medical imaging, fixed medical imaging, PET, positron emission tomography (PET), magnetic resonance imaging (MRI), Computed tomography (CT), and cancer imaging. The company offers imaging services and the latest diagnostic technology to hospitals, imaging centers, and clinics.

21.4.2 Service Offerings

Table 7 Front Range Mobile Imaging: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➢ PET/CT ➢ MRI ➢ CT

Source: Company Websites & Arizton

21.5 DIGIRAD

21.5.1 Business Overview

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 across the country who specialize in providing a wide range of diagnostic healthcare services. Additionally, the company has an extensive portfolio of mobile healthcare solutions and mobile imaging devices and services for hospitals, clinics, and imaging centers. The company's affordable and cost-effective approach to providing healthcare solutions and a wide range of technologically advanced medical imaging and monitoring services have enabled it to gain a competitive edge in the market.

21.5.2 Service Offerings

Table 8 *Digirad: Major Product Offerings*

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➤ Mobile Nuclear Cardiology ➤ Interim Nuclear Equipment ➤ Fixed-Site Nuclear Cardiology ➤ Outreach Solutions ➤ Nuclear Medicine Support Services

Source: Company Websites & Arizton

21.6 INHEALTH GROUP

21.6.1 Business Overview

InHealth is the UK's largest provider of professional healthcare and diagnostic solutions. Headquartered in Buckinghamshire, the UK, the privately-held company partners with hospitals, the NHS, and independent regional commissioners to improve the delivery of healthcare services. The company provides services for MRI, CT, X-ray, DXA, PET/CT, mammography, ultrasound, cardiac interventions,

audiology, otolaryngology, endoscopy, physiological measurements, and echocardiography services. The company caters to 3 million patients every year and provides safe, effective, and rapid care that contributes to the UK healthcare system and improves patient outcomes.

21.6.2 Service Offerings

Table 9 InHealth: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➢ MRI ➢ CT ➢ ENDOSCOPY ➢ MAMMOGRAPHY ➢ PET ➢ CARDIAC CATH LAB

Source: Company Websites & Arizton

21.7 SHARED MEDICAL SERVICES

21.7.1 Business Overview

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. The company has been awarded the Joint Commission Gold Certificate of Approval, which certifies compliance with the United Nations Commission's national health safety and quality standards. The company collaborates with GE, Siemens, Philips, and Canon Medical Systems on imaging systems. The company has successfully managed imaging services for the past 30 years.

21.7.2 Service Offerings

Table 10 Shared Imaging Services: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➢ Mobile MRI ➢ Mobile CT ➢ Mobile PET/CT ➢ Mobile Digital PET/CT ➢ Mammography

Source: Company Websites & Arizton

21.8 ACCURATE IMAGING DIAGNOSTICS

21.8.1 Business Overview

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 has its operations in the Greater Toronto Area, including Richmond Hill, Markham, North York, York Region, and Peel. The company aims to provide high-quality care to patients with empathy and sensitivity and deliver the best possible healthcare experience. The company has highly trained and compassionate healthcare professionals who are dedicated to demonstrating a safe and professional medical imaging exam. The company offers state-of-the-art imaging equipment for accurate diagnosis and complete patient comfort.

21.8.2 Service Offerings

Table 11 Accurate Imaging Diagnostics: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➢ Ultrasound ➢ X-Ray ➢ Bone Mineral Density Test

- Dexa Body Composition Scan
- Mobile Ultrasound Business Development

Source: Company Websites & Arizton

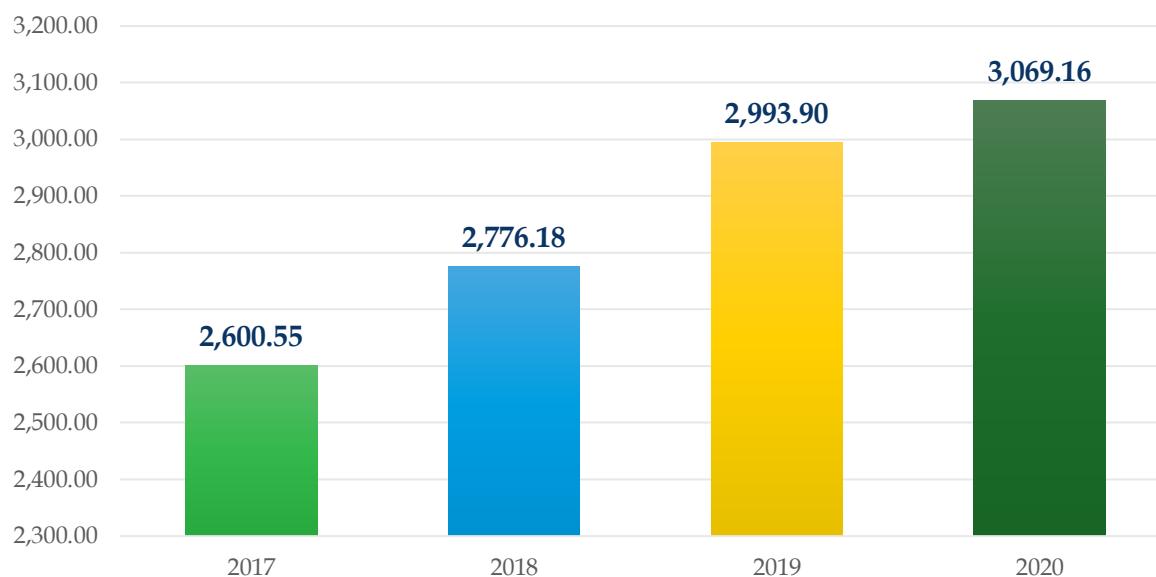
21.9 ATLANTIC MEDICAL IMAGING

21.9.1 Business Overview

Headquartered in New Jersey, the US, Atlantic Medical Imaging was founded in 1964. The company has 52 board-certified radiologists and 650 staff members. 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.

Additionally, the company has grown into an expansive imaging provider with 16 offices throughout New Jersey. The company has board-certified physicians and university-trained radiologists to provide the highest quality diagnostic imaging services to patients and referring clinicians.

Exhibit 106 Atlantic Medical Imaging Revenue 2017–2019(\$ million)



21.9.2 Service Offerings

Table 12 Accelerated Care Plus: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➤ 3D Tomosynthesis ➤ Breast Imaging & Mammography ➤ Cardiac Imaging Center of Excellence ➤ Coronary CTA ➤ CT ➤ DEXA Scan ➤ General Radiology & Fluoroscopy ➤ Low Dose CT Lung Screening ➤ MRI ➤ Nuclear Medicine ➤ PET/CT ➤ Pediatric Imaging ➤ Ultrasound ➤ Vascular Institute

Source: Company Websites & Arizton

21.10 ONSITE IMAGING

21.10.1 Business Overview

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 with the ability to offer convenient and cost-effective diagnostic services and improve patient satisfaction. The company has 200 and more providers and caters to clinics, hospitals, and other designated healthcare settings. The company uses leading-edge equipment and technology. The

onsite ultrasound team has certified sonographers certified by American Registry for Diagnostic Medical Sonography (ARDMS).

21.10.2 Service Offerings

Table 13 Onsite Imaging: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➤ Ultrasound Imaging ➤ Pelvic Floor Therapy

Source: Company Websites & Arizton

21.11 JACKSONVILLE / FIRST COAST MOBILE IMAGING SERVICES

21.11.1 Business Overview

The company has served in the North Florida area since 1992 and offers unequaled 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 utilize the most sophisticated equipment. The company has experienced, licensed professionals, and board-certified radiologists and cardiologists to provide exam interpretations

21.11.2 Service Offerings

Table 14 First Coast Mobile Imaging Services: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➤ Aesthetic Therapy

Source: Company Websites & Arizton

21.12 QUALITY MEDICAL IMAGING

21.12.1 Business Overview

Founded in 2001, Quality Medical Imaging specializes in mobile digital X-rays, diagnostic ultrasounds, EKGs, and PICC placements. The company employs board-certified radiologists and cardiologists and highly trained technicians to deliver efficient mobile medical imaging services and enable expedient patient care. Also, the company offers innovative mobile digital services, including comprehensive and customized report patient data, patient trending, and long-term statistical data. The company offers secure online ordering and the ability to interface directly with the patient management system with database interfacing or bridging.

21.12.2 Service Offerings

Table 15 *Quality Medical Imaging: Major Product Offerings*

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➤ Mobile Digital X-Rays ➤ Diagnostic Ultrasound ➤ EKG

Source: Company Websites & Arizton

21.13 ALLIANCE MEDICAL

21.13.1 Business Overview

Founded in 1989, Alliance Medical offers mobile medical imaging services in the UK. The company has plans to expand its presence in Europe. The company expanded its services internationally when Dubai International Capital acquired Alliance Medical in 2007. The company is focused on continuous innovation and offers the most up-to-date services and technologies. In 2013, the company made a strategic move into radiopharmaceuticals, creating an organization that provides the only integrated molecular imaging services in the UK. The company introduced six more MRI scanning sites and scanners into an independent hospital network and secured new NHS sites and developed mobile services to meet the changing requirements of customers.

21.13.2 Service Offerings

Table 16 Alliance Medical: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➢ PET ➢ CT
	<i>Source: Company Websites & Arizton</i>

21.14 ALLIANCE-HNI HEALTH CARE SERVICES

21.14.1 Business Overview

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. The company operates through more than 600 diagnostic radiology facilities, including nearly 100 fixed-site radiology locations and more than 50 cancer care centers. In 1997, the company entered into a partnership with Alliance HealthCare Services, one of the largest and most successful healthcare services organizations in the US.

21.14.2 Service Offerings

Table 17 Alliance-Hni Health Care Services: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➢ X-rays ➢ Ultrasounds ➢ EKG's

Source: Company Websites & Arizton

21.15 MANTRO MOBILE IMAGING

21.15.1 Business Overview

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 its office in

California, the US. The company employs technologists certified by ARRT, ARDMS, and CCI. All staff is ELS certified. The technicians in the company are experienced professionals with special training and certification. The company plans to expand its operations further by offering vascular access imaging services in Southern California and Nevada.

21.15.2 Service Offerings

Table 18 Mantro Mobile Imaging: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➤ X-rays ➤ Ultrasounds ➤ EKG's ➤ Echocardiograms

Source: Company Websites & Arizton

21.16 RAYUS RADIOLOGY

21.16.1 Business Overview

The company is a provider of advanced diagnostic and interventional radiology services. On July 23, 2021, the company announced the acquisition of Foundation Radiology Group a full-service radiology provider with more than 100 radiologists serving more than 45 health systems, community hospitals, notable university medical institutions, and outpatient imaging facilities across seven states with onsite and teleradiology services. The company provides a comprehensive array of mobile diagnostic imaging and staffing solutions, such as full-service, short- and long-term MRI, PET/CT, and CT solutions for hospitals, clinics, and health care organizations across the country. The company has been providing its services for more than 30 years.

21.16.2 Service Offerings

Table 19 Rayus Radiology: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➢ Mobile MRI ➢ PET/CT ➢ CT

Source: Company Websites & Arizton

21.17 ULTRA-X IMAGING

21.17.1 Business Overview

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. Established in 2015, the company is based in Michigan, the US and 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. The company uses leading-edge technology combined with its UltraLynk platform. Also, the company offers diagnostic imaging health services for patients in their home-care settings.

21.17.2 Service Offerings

Table 20 Ultra-X imaging: Major Product Offerings

Particulars	Product Offerings
Mobile Medical Imaging Services	<ul style="list-style-type: none"> ➢ PORTABLE X-RAY SERVICES ➢ ULTRASOUND ➢ MOBILE ECHOCARDIOGRAM SERVICES

Source: Company Websites & Arizton



REPORT SUMMARY

22 REPORT SUMMARY

22.1 KEY TAKEAWAYS

- › Factors such as the surge in the prevalence of many acute and chronic diseases and the increase in the adoption of medical imaging procedures for diagnosing a wide array of diseases are expected to drive the global mobile medical imaging services market
- › The considerable rise in the incidences of chronic diseases such as cancer, cardiovascular diseases, gastrointestinal and endocrinological disorders, and neurological and lung disorders is expected to propel the demand for mobile medical imaging services
- › In terms of revenue, North America dominates the global mobile medical imaging services market, followed by Europe, APAC, Latin America, and Middle East & Africa
- › Several vendors are increasing their focus on enhancing technological devices in response to the recent COVID-19 pandemic, which is contributing to the current spike in sales of mobile devices for medical imaging procedures

22.2 STRATEGIC RECOMMENDATIONS

- › Vendors, especially global players, must focus on pursuing inorganic growth strategies such as acquisitions to expand their presence, enhance product portfolio, and improve their ability in the market. Such inorganic initiatives will complement vendors' organic growth strategies, thereby gaining traction among end users in the market
- › The expanding applications of mobile medical imaging platforms in women's health, cardiology, emergency & ambulatory care, and neurology offer significant growth opportunities for service providers. Therefore, mobile medical imaging service providers need to procure advanced and compact imaging platforms which can offer such services to patients during urgent and emergencies
- › The increasing availability of portable and compact medical imaging equipment will encourage new entrants to tap into this market potential and offer their services in remote and rural areas where medical imaging services are not accessible
- › Service providers must collaborate with OEMs of medical imaging equipment and prioritize on procuring a wide range of highly advanced and compact medical imaging platforms to increase their reach and target a large pool of patients
- › A mobile radiology viewer and a smartphone ultrasound probe were authorized by the US FDA in 2011. AT&T began giving cloud-based mobile access to medical photos later in 2011, allowing for the storage, access, viewing, and sharing of medical images both

within and outside of a medical facility. GE's Access 2.0, a mobile imaging diagnostics platform allows users to evaluate pictures on mobile devices running Apple iOS and Android 2.2 and higher

- The market is expected to become more competitive as a substantial number of mobile medical imaging service providers foray into the market

23 QUANTITATIVE SUMMARY

23.1 MARKET BY GEOGRAPHY

Table 21 Global Mobile Medical Imaging Services Market by Geography 2021–2027 (\$ million)

REGION	2021	2022	2023	2024	2025	2026	2027	CAGR
NORTH AMERICA	431.21	447.73	467.27	489.51	513.27	539.50	566.85	4.66%
EUROPE	283.55	297.56	313.84	332.24	352.00	373.81	396.79	5.76%
APAC	214.00	223.22	234.03	246.28	259.41	273.91	289.09	5.14%
LATIN AMERICA	85.60	87.24	89.36	91.89	94.57	97.56	100.62	2.73%
MIDDLE EAST & AFRICA	55.64	56.63	57.87	59.30	60.74	62.29	63.77	2.30%
TOTAL	1,070.00	1,112.37	1,162.38	1,219.22	1,279.99	1,347.07	1,417.12	4.79%

Source: Arizton

Table 22 Global Mobile Medical Imaging Services Market by Geography 2021–2027 (%)

REGION	2021	2022	2023	2024	2025	2026	2027
NORTH AMERICA	40.30%	40.25%	40.20%	40.15%	40.10%	40.05%	40.00%
EUROPE	26.50%	26.75%	27.00%	27.25%	27.50%	27.75%	28.00%
APAC	20.00%	20.07%	20.13%	20.20%	20.27%	20.33%	20.40%
LATIN AMERICA	8.00%	7.84%	7.69%	7.54%	7.39%	7.24%	7.10%
MIDDLE EAST & AFRICA	5.20%	5.09%	4.98%	4.86%	4.75%	4.62%	4.50%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: Arizton

23.2 MARKET BY SERVICE TYPE

Table 23 Global Mobile Medical Imaging Services Market by Service Type 2021–2027 (\$ million)

PRODUCT	2021	2022	2023	2024	2025	2026	2027	CAGR
MOBILE X-RAY	267.79	279.36	292.93	308.32	324.80	343.00	362.06	5.16%
MOBILE CT	211.61	221.72	233.49	246.80	261.07	276.83	293.40	5.60%
MOBILE ULTRASOUND	190.38	197.51	205.97	215.59	225.87	237.21	249.03	4.58%
MOBILE MRI	125.86	133.57	142.41	152.35	163.07	174.90	187.19	6.84%
MOBILE EKG	105.63	108.02	110.99	114.45	118.08	122.09	126.64	3.07%
OTHERS	168.73	172.20	176.58	181.71	187.10	193.05	198.79	2.77%
TOTAL	1,070.00	1,112.37	1,162.38	1,219.22	1,279.99	1,347.07	1,417.12	4.79%

Source: Arizton

Table 24 Global Mobile Medical Imaging Services Market by Service Type 2021–2027 (%)

PRODUCT	2021	2022	2023	2024	2025	2026	2027
MOBILE X-RAY	24.97%	25.06%	25.15%	25.23%	25.32%	25.41%	25.50%
MOBILE CT	19.70%	19.85%	20.01%	20.16%	20.31%	20.46%	20.61%
MOBILE ULTRASOUND	17.70%	17.66%	17.62%	17.58%	17.55%	17.51%	17.47%
MOBILE MRI	11.67%	11.91%	12.14%	12.37%	12.61%	12.84%	13.02%
MOBILE EKG	9.81%	9.64%	9.48%	9.32%	9.15%	8.99%	8.92%
OTHERS	16.14%	15.87%	15.60%	15.34%	15.07%	14.80%	14.48%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: Arizton

23.3 MARKET BY END USER

Table 25 Global Mobile Medical Imaging Services Market by End User 2021–2027 (\$ million)

END USER	2021	2022	2023	2024	2025	2026	2027	CAGR
NURSING HOMES & ASSISTED LIVING FACILITIES	234.70	243.51	253.94	265.82	278.51	292.50	307.08	4.58%
HOME HEALTH & HOSPICE CARE PROVIDERS	372.94	390.74	411.48	434.92	460.08	487.86	517.08	5.60%
LONG-TERM ACUTE CARE FACILITIES	276.19	287.04	299.86	314.42	329.99	347.17	365.11	4.76%
OTHERS	186.16	191.08	197.10	204.06	211.42	219.54	227.85	3.43%
TOTAL	1,070.00	1,112.37	1,162.38	1,219.22	1,279.99	1,347.07	1,417.12	4.79%

Source: Arizton

Table 26 Global Mobile Medical Imaging Services Market by End User 2021–2027 (%)

END-USER	2021	2022	2023	2024	2025	2026	2027
NURSING HOMES & ASSISTED LIVING FACILITIES	21.85%	21.80%	21.75%	21.70%	21.66%	21.61%	21.56%
HOME HEALTH & HOSPICE CARE PROVIDERS	34.75%	35.02%	35.29%	35.57%	35.84%	36.11%	36.38%
LONG-TERM ACUTE CARE FACILITIES	25.73%	25.71%	25.70%	25.68%	25.67%	25.65%	25.63%
OTHERS	17.67%	17.47%	17.26%	17.05%	16.84%	16.63%	16.43%
TOTAL	100.00%						

Source: Arizton

23.4 NORTH AMERICA : BY SERVICE TYPE

Table 27 North America Mobile Medical Imaging Services Market by Service Type 2021–2027 (\$ million)

SERVICE TYPE	2021	2022	2023	2024	2025	2026	2027	CAGR
MOBILE X-RAY	107.80	112.23	117.44	123.36	129.69	136.67	143.98	4.94%
MOBILE CT	86.24	90.29	95.01	100.35	106.08	112.40	119.04	5.52%
MOBILE ULTRASOUND	77.62	80.52	83.95	87.87	92.05	96.66	101.47	4.57%
MOBILE MRI	51.75	55.22	59.19	63.64	68.44	73.73	79.36	7.39%
MOBILE EKG	43.12	44.03	45.17	46.50	47.91	49.45	51.02	2.84%
OTHERS	64.68	65.44	66.51	67.80	69.12	70.58	71.99	1.80%
TOTAL	431.21	447.73	467.27	489.51	513.27	539.50	566.85	4.66%

Source: Arizton

Table 28 North America Mobile Medical Imaging Services Market by Service Type 2021–2027 (%)

PRODUCT	2021	2022	2023	2024	2025	2026	2027
MOBILE X-RAY	25.00%	25.07%	25.13%	25.20%	25.27%	25.33%	25.40%
MOBILE CT	20.00%	20.17%	20.33%	20.50%	20.67%	20.83%	21.00%
MOBILE ULTRASOUND	18.00%	17.98%	17.97%	17.95%	17.93%	17.92%	17.90%
MOBILE MRI	12.00%	12.33%	12.67%	13.00%	13.33%	13.67%	14.00%
MOBILE EKG	10.00%	9.83%	9.67%	9.50%	9.33%	9.17%	9.00%
OTHERS	15.00%	14.62%	14.23%	13.85%	13.47%	13.08%	12.70%
TOTAL	100.00%						

Source: Arizton

23.5 NORTH AMERICA: BY END USER

Table 29 North America Mobile Medical Imaging Services Market by End User 2021–2027 (\$ million)

END USER	2021	2022	2023	2024	2025	2026	2027	CAGR
NURSING HOMES & ASSISTED LIVING FACILITIES	94.87	98.43	102.64	107.45	112.58	118.24	124.14	4.58%
HOME HEALTH & HOSPICE CARE PROVIDERS	150.92	157.82	165.88	175.00	184.78	195.57	206.90	5.40%
LONG-TERM ACUTE CARE FACILITIES	112.11	116.56	121.80	127.76	134.14	141.17	148.51	4.80%
OTHERS	73.31	74.92	76.94	79.30	81.78	84.52	87.29	2.95%
TOTAL	431.21	447.73	467.27	489.51	513.27	539.50	566.85	4.66%

Source: Arizton

Table 30 North America Mobile Medical Imaging Services Market by End User 2021–2027 (%)

END USER	2021	2022	2023	2024	2025	2026	2027
NURSING HOMES & ASSISTED LIVING FACILITIES	22.00%	21.98%	21.97%	21.95%	21.93%	21.92%	21.90%
HOME HEALTH & HOSPICE CARE PROVIDERS	35.00%	35.25%	35.50%	35.75%	36.00%	36.25%	36.50%
LONG-TERM ACUTE CARE FACILITIES	26.00%	26.03%	26.07%	26.10%	26.13%	26.17%	26.20%
OTHERS	17.00%	16.73%	16.47%	16.20%	15.93%	15.67%	15.40%
TOTAL	100.00%						

Source: Arizton

23.6 EUROPE: BY SERVICE TYPE

Table 31 Europe Mobile Medical Imaging Services Market by Service Type 2021–2027 (\$ million)

SERVICE TYPE	2021	2022	2023	2024	2025	2026	2027	CAGR
MOBILE X-RAY	69.47	73.15	77.41	82.23	87.41	93.14	99.20	6.12%
MOBILE CT	56.43	59.51	63.08	67.11	71.46	76.26	81.34	6.29%
MOBILE ULTRASOUND	50.19	52.57	55.34	58.47	61.83	65.54	69.44	5.56%
MOBILE MRI	33.74	35.86	38.29	41.03	44.00	47.29	50.79	7.05%
MOBILE EKG	27.79	28.57	29.50	30.57	31.68	32.90	34.12	3.48%
OTHERS	45.94	47.91	50.21	52.83	55.62	58.69	61.90	5.10%
TOTAL	283.55	297.56	313.84	332.24	352.00	373.81	396.79	5.76%

Source: Arizton

Table 32 Europe Mobile Medical Imaging Services Market by Service Type 2021–2027 (%)

SERVICE TYPE	2021	2022	2023	2024	2025	2026	2027
MOBILE X-RAY	24.50%	24.58%	24.67%	24.75%	24.83%	24.92%	25.00%
MOBILE CT	19.90%	20.00%	20.10%	20.20%	20.30%	20.40%	20.50%
MOBILE ULTRASOUND	17.70%	17.67%	17.63%	17.60%	17.57%	17.53%	17.50%
MOBILE MRI	11.90%	12.05%	12.20%	12.35%	12.50%	12.65%	12.80%
MOBILE EKG	9.80%	9.60%	9.40%	9.20%	9.00%	8.80%	8.60%
OTHERS	16.20%	16.10%	16.00%	15.90%	15.80%	15.70%	15.60%
TOTAL	24.50%	24.58%	24.67%	24.75%	24.83%	24.92%	25.00%

Source: Arizton

23.7 EUROPE: BY END USER

Table 33 Europe Mobile Medical Imaging Services Market by End User 2021–2027 (\$ million)

END USER	2021	2022	2023	2024	2025	2026	2027	CAGR
NURSING HOMES & ASSISTED LIVING FACILITIES	61.81	64.67	68.00	71.76	75.80	80.25	84.91	5.43%
HOME HEALTH & HOSPICE CARE PROVIDERS	97.26	102.76	109.11	116.28	124.02	132.58	141.66	6.47%
LONG-TERM ACUTE CARE FACILITIES	72.59	76.08	80.13	84.72	89.64	95.07	100.79	5.62%
OTHERS	51.89	54.06	56.60	59.47	62.54	65.92	69.44	4.98%
TOTAL	283.55	297.56	313.84	332.24	352.00	373.81	396.79	5.76%

Source: Arizton

Table 34 Europe Mobile Medical Imaging Services Market by End User 2021–2027 (%)

END USER	2021	2022	2023	2024	2025	2026	2027
NURSING HOMES & ASSISTED LIVING FACILITIES	21.80%	21.73%	21.67%	21.60%	21.53%	21.47%	21.40%
HOME HEALTH & HOSPICE CARE PROVIDERS	34.30%	34.53%	34.77%	35.00%	35.23%	35.47%	35.70%
LONG-TERM ACUTE CARE FACILITIES	25.60%	25.57%	25.53%	25.50%	25.47%	25.43%	25.40%
OTHERS	18.30%	18.17%	18.03%	17.90%	17.77%	17.63%	17.50%
TOTAL	100.00%						

Source: Arizton

23.8 APAC : BY SERVICE TYPE

Table 35 APAC Mobile Medical Imaging Services Market by Service Type 2021–2027 (\$ million)

PRODUCT	2021	2022	2023	2024	2025	2026	2027	CAGR
MOBILE X-RAY	56.28	58.97	62.09	65.63	69.44	73.63	78.06	5.60%
MOBILE CT	41.94	44.16	46.73	49.63	52.75	56.20	59.84	6.10%
MOBILE ULTRASOUND	38.31	39.77	41.50	43.47	45.57	47.89	50.30	4.65%
MOBILE MRI	24.61	26.19	28.01	30.05	32.25	34.69	37.29	7.17%
MOBILE EKG	21.61	22.28	23.09	24.01	24.99	26.07	27.17	3.89%
OTHERS	31.24	31.85	32.61	33.49	34.42	35.43	36.43	2.59%
TOTAL	214.00	223.22	234.03	246.28	259.41	273.91	289.09	5.14%

Source: Arizton

Table 36 APAC Mobile Medical Imaging Services Market by Service Type 2021–2027 (%)

PRODUCT	2021	2022	2023	2024	2025	2026	2027
MOBILE X-RAY	26.30%	26.42%	26.53%	26.65%	26.77%	26.88%	27.00%
MOBILE CT	19.60%	19.78%	19.97%	20.15%	20.33%	20.52%	20.70%
MOBILE ULTRASOUND	17.90%	17.82%	17.73%	17.65%	17.57%	17.48%	17.40%
MOBILE MRI	11.50%	11.73%	11.97%	12.20%	12.43%	12.67%	12.90%
MOBILE EKG	10.10%	9.98%	9.87%	9.75%	9.63%	9.52%	9.40%
OTHERS	14.60%	14.27%	13.93%	13.60%	13.27%	12.93%	12.60%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: Arizton

23.9 APAC : BY END USER

Table 37 APAC Mobile Medical Imaging Services Market by End User 2021–2027 (\$ million)

END USER	2021	2022	2023	2024	2025	2026	2027	CAGR
NURSING HOMES & ASSISTED LIVING FACILITIES	47.94	49.85	52.11	54.67	57.42	60.44	63.60	4.83%
HOME HEALTH & HOSPICE CARE PROVIDERS	76.83	80.92	85.65	91.00	96.76	103.13	109.86	6.14%
LONG-TERM ACUTE CARE FACILITIES	56.07	58.37	61.08	64.16	67.45	71.08	74.88	4.94%
OTHERS	33.17	34.08	35.18	36.45	37.79	39.26	40.76	3.49%
TOTAL	214.00	223.22	234.03	246.28	259.41	273.91	289.09	5.14%

Source: Arizton

Table 38 APAC Mobile Medical Imaging Services Market by End User 2021–2027 (%)

END USER	2021	2022	2023	2024	2025	2026	2027
NURSING HOMES & ASSISTED LIVING FACILITIES	22.40%	22.33%	22.27%	22.20%	22.13%	22.07%	22.00%
HOME HEALTH & HOSPICE CARE PROVIDERS	35.90%	36.25%	36.60%	36.95%	37.30%	37.65%	38.00%
LONG-TERM ACUTE CARE FACILITIES	26.20%	26.15%	26.10%	26.05%	26.00%	25.95%	25.90%
OTHERS	15.50%	15.27%	15.03%	14.80%	14.57%	14.33%	14.10%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: Arizton

23.10 LATIN AMERICA : BY SERVICE TYPE

Table 39 Latin America Mobile Medical Imaging Services Market by Service Type 2021–2027 (\$ million)

PRODUCT	2021	2022	2023	2024	2025	2026	2027	CAGR
MOBILE X-RAY	20.54	21.05	21.69	22.42	23.20	24.07	24.95	3.29%
MOBILE CT	16.26	16.76	17.37	18.06	18.79	19.59	20.42	3.87%
MOBILE ULTRASOUND	14.81	15.05	15.37	15.76	16.17	16.63	17.10	2.43%
MOBILE MRI	9.59	9.87	10.22	10.61	11.03	11.50	11.97	3.77%
MOBILE EKG	7.88	7.94	8.04	8.18	8.32	8.49	8.65	1.58%
OTHERS	16.52	16.56	16.68	16.86	17.05	17.29	17.51	0.97%
TOTAL	85.60	87.24	89.36	91.89	94.57	97.56	100.62	2.73%

Source: Arizton

Table 40 Latin America Mobile Medical Imaging Services Market by Service Type 2021–2027 (%)

PRODUCT	2021	2022	2023	2024	2025	2026	2027
MOBILE X-RAY	24.00%	24.13%	24.27%	24.40%	24.53%	24.67%	24.80%
MOBILE CT	19.00%	19.22%	19.43%	19.65%	19.87%	20.08%	20.30%
MOBILE ULTRASOUND	17.30%	17.25%	17.20%	17.15%	17.10%	17.05%	17.00%
MOBILE MRI	11.20%	11.32%	11.43%	11.55%	11.67%	11.78%	11.90%
MOBILE EKG	9.20%	9.10%	9.00%	8.90%	8.80%	8.70%	8.60%
OTHERS	19.30%	18.98%	18.67%	18.35%	18.03%	17.72%	17.40%
TOTAL	100.00%						

Source: Arizton

23.11 LATIN AMERICA : BY END-USER

Table 41 Latin America Mobile Medical Imaging Services Market by End User 2021–2027 (\$ million)

END USER	2021	2022	2023	2024	2025	2026	2027	CAGR
NURSING HOMES & ASSISTED LIVING FACILITIES	18.40	18.70	19.09	19.57	20.08	20.65	21.23	2.41%
HOME HEALTH & HOSPICE CARE PROVIDERS	29.02	29.88	30.92	32.11	33.38	34.78	36.22	3.76%
LONG-TERM ACUTE CARE FACILITIES	21.40	21.79	22.31	22.93	23.58	24.31	25.05	2.66%
OTHERS	16.78	16.87	17.04	17.27	17.53	17.82	18.11	1.28%
TOTAL	85.60	87.24	89.36	91.89	94.57	97.56	100.62	2.73%

Source: Arizton

Table 42 Latin America Mobile Medical Imaging Services Market by End User 2021–2027 (%)

END USER	2021	2022	2023	2024	2025	2026	2027
NURSING HOMES & ASSISTED LIVING FACILITIES	21.50%	21.43%	21.37%	21.30%	21.23%	21.17%	21.10%
HOME HEALTH & HOSPICE CARE PROVIDERS	33.90%	34.25%	34.60%	34.95%	35.30%	35.65%	36.00%
LONG-TERM ACUTE CARE FACILITIES	25.00%	24.98%	24.97%	24.95%	24.93%	24.92%	24.90%
OTHERS	19.60%	19.33%	19.07%	18.80%	18.53%	18.27%	18.00%
TOTAL	100.00%						

Source: Arizton

23.12 MIDDLE EAST & AFRICA : BY SERVICE TYPE

Table 43 Middle East & Africa Mobile Medical Imaging Services Market by Service Type 2021–2027 (\$ million)

PRODUCT	2021	2022	2023	2024	2025	2026	2027	CAGR
MOBILE X-RAY	13.69	13.96	14.29	14.68	15.06	15.48	15.88	2.51%
MOBILE CT	10.74	11.00	11.30	11.65	12.01	12.39	12.75	2.91%
MOBILE ULTRASOUND	9.46	9.61	9.80	10.02	10.25	10.49	10.71	2.10%
MOBILE MRI	6.18	6.43	6.71	7.03	7.35	7.69	7.78	3.92%
MOBILE EKG	5.23	5.20	5.19	5.19	5.18	5.18	5.68	1.37%
OTHERS	10.35	10.44	10.57	10.73	10.89	11.07	10.97	0.97%
TOTAL	55.64	56.63	57.87	59.30	60.74	62.29	63.77	2.30%

Source: Arizton

Table 44 Middle East & Africa Mobile Medical Imaging Services Market by Service Type 2021–2027 (%)

PRODUCT	2021	2022	2023	2024	2025	2026	2027
MOBILE X-RAY	24.60%	24.65%	24.70%	24.75%	24.80%	24.85%	24.90%
MOBILE CT	19.30%	19.42%	19.53%	19.65%	19.77%	19.88%	20.00%
MOBILE ULTRASOUND	17.00%	16.97%	16.93%	16.90%	16.87%	16.83%	16.80%
MOBILE MRI	11.10%	11.35%	11.60%	11.85%	12.10%	12.35%	12.20%
MOBILE EKG	9.40%	9.18%	8.97%	8.75%	8.53%	8.32%	8.90%
OTHERS	18.60%	18.43%	18.27%	18.10%	17.93%	17.77%	17.20%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: Arizton

23.13 MIDDLE EAST & AFRICA : BY END USER

Table 45 Middle East & Africa Mobile Medical Imaging Services Market by End User 2021–2027 (\$ million)

END USER	2021	2022	2023	2024	2025	2026	2027	CAGR
NURSING HOMES & ASSISTED LIVING FACILITIES	11.68	11.86	12.10	12.36	12.63	12.93	13.20	2.05%
HOME HEALTH & HOSPICE CARE PROVIDERS	18.92	19.37	19.91	20.52	21.14	21.80	22.45	2.89%
LONG-TERM ACUTE CARE FACILITIES	14.02	14.24	14.53	14.85	15.19	15.54	15.88	2.10%
OTHERS	11.02	11.16	11.34	11.56	11.78	12.02	12.24	1.78%
TOTAL	55.64	56.63	57.87	59.30	60.74	62.29	63.77	2.30%

Source: Arizton

Table 46 Middle East & Africa Mobile Medical Imaging Services Market by End User 2021–2027 (%)

END USER	2021	2022	2023	2024	2025	2026	2027
NURSING HOMES & ASSISTED LIVING FACILITIES	21.00%	20.95%	20.90%	20.85%	20.80%	20.75%	20.70%
HOME HEALTH & HOSPICE CARE PROVIDERS	34.00%	34.20%	34.40%	34.60%	34.80%	35.00%	35.20%
LONG-TERM ACUTE CARE FACILITIES	25.20%	25.15%	25.10%	25.05%	25.00%	24.95%	24.90%
OTHERS	19.80%	19.70%	19.60%	19.50%	19.40%	19.30%	19.20%
TOTAL	100.00%						

Source: Arizton

24 APPENDIX

24.1 ABBREVIATIONS

- › APAC Asia Pacific
- › CE European Commission
- › EU European Union
- › EUR Euro
- › FDA Food and Drug Administration
- › JCI Joint Commission International
- › MEA Middle East Africa
- › MN Million
- › OECD Organisation for Economic Co-operation & Development
- › UN United Nation
- › USD United States Dollar
- › WHO World Health Organization
- › CT Computed Tomography
- › MRI Magnetic Resonance Imaging
- › PACS Picture Archiving and Communications Systems
- › AI Artificial Intelligence
- › PET Positron Emission Tomography
- › PUD Portable Ultrasound Devices
- › NHS National Health Service
- › AMA American Medical Association
- › NAPXP National Association of Portable X-ray Providers
- › FAPXP Florida Alliance of Portable X-ray Providers
- › NEFADONA Northeast Florida Association of Director of Nursing Administration
- › ECG Electrocardiogram

- › LTAC Long-Term Acute Care
- › IRF Inpatient Rehabilitation Facilities
- › MENA Middle East and North Africa

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CONTACT US



info@arizton.com
Fax : +1 312 276 8383



AMERICAS : +1 (312) 235 2040
APAC : +65 3163 2660



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