

India Medical Imaging Industry Outlook to 2017 – Led by Surging Income and Low Penetration

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Abstracts

The report titled 'India Medical Imaging Industry Outlook to 2017 – Led by Surging Income and Low Penetration' provides a comprehensive analysis of the various aspects such as market size, segmentation, trends and developments and future projections of the X-ray, Ultrasound, MRI, CT and Nuclear Medicine as key segments of the market. The report also provides detailed explanation of the various macro and industry factors which are driving the growth of the market for these five segments of diagnostic imaging in India. Additionally, it also covers market share of major players present in the strategically significant medical imaging equipment market of India.

India's medical imaging equipment market has been on a constant rise since the long time now correlated to the growing chronic diseases and lack of well established medical imaging equipments per 1,000 populations in the country. India's medical imaging market grew at a CAGR of 11.4% from USD ~ million in 2008 to USD ~ million in 2012. This growth was primarily due to the increasing establishments of healthcare units including hospitals and diagnostic centers. MRI is the largest equipment category in terms of sales revenue which accounted for ~% of the total sales generated from the medical imaging equipments sold in the country in 2012. This is closely followed by ultrasound and CT scanners which represented ~% each. Nuclear medicine and X-ray accounted for the rest of 12.3% and 11.8% respectively of the total medical imaging equipment market.

India's MRI market is the largest medical imaging equipment market in the country. The market has showcased healthy growth during the last four years and has grown at a CAGR of around 10.3% from USD ~ million in 2008 to USD ~ million in 2012. This is majorly because of the high image quality offered by the MRI systems and their cost effectiveness. The contribution of 1.5T MRI Economy in the Indian MRI market has

increased significantly during the last few years while the contribution of mid and high end MRI equipment has reduced over the years. The major factors responsible for the growth of the 1.5T MRI Economy segment in India is their ability to offer high speed scanning combined with high image quality. Siemens leads the India's MRI medical equipment market with ~% share with price competitive products coupled with adequate networking and marketing executives to support the sales. Following the leader is Phillips healthcare with ~% market share with its Ingenia 1.5T as its top selling product. The GE healthcare ranks third with ~% market share with its top selling Signa HDxt 1.5T.

The ultrasound market in India is the second largest medical imaging equipment market after MRI and contributes ~% to the overall medical imaging market of the country by revenues from the sales of the equipments.

The CT equipment market is the third largest market in India and contributes ~% to the total medical imaging equipment market in the country. The market has increased strongly during the last four year period of 2008-2012 where it has reached USD ~ million in 2012 from USD ~million in 2008 by growing at a CAGR of 18.9% during 2008-2012. The growing penetration of the private hospitals in tier I and tier II cities, growing number of private standalone diagnostic centers in the country, a rising number of government teaching and non-teaching hospitals have the major drivers of the CT equipment market in India. India's CT market is anticipated to grow at a CAGR of around 19.5% during 2012-2017 where the sales of these equipments are expected to reach to USD ~ million in 2017 from USD ~ million in 2012. GE healthcare has been the market leader in Ultrasound medical imaging equipment market. GE healthcare holds the largest share of around ~% due to its economical final products as it manufactures locally at its Bangalore research and manufacturing unit. Siemens holds the second rank in the ultrasound market in the nation with ~% share.

The medical imaging equipment market in India is estimated to grow at a strong positive growth until 2017, where the market is expected to reach USD ~ million in 2017 from USD ~ million in 2012 by growing at a CAGR of 13.6% during 2012-2017. The various factors that will influence the growth of the medical imaging market of India in coming years include large population size, increasing spending capacity of the population, expanding network of the private hospital chains and growing penetration of the private standalone diagnostic services.

KEY TOPICS COVERED IN THE REPORT

The market size of the India medical imaging market on the basis of revenues from sales of the equipments.

The market segmentation of the India medical imaging market by X-ray, ultrasound, CT, MRI and nuclear medicine.

The market size of the India X-ray, ultrasound, CT, MRI and nuclear medicine markets on the basis of revenue.

Imports and Exports of India X-ray, ultrasound, CT, MRI and nuclear medicine markets.

Market share of major players in India X-ray, ultrasound, CT, MRI and nuclear medicine markets.

Trends and developments in the medical imaging markets of India.

Future outlook and projections of the X-ray, ultrasound, CT, MRI and nuclear medicine markets for medical imaging markets of India.

Future outlook and projections of the medical imaging market of India.

Company Profiles of major players in the medical imaging industry of India.

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