

South & Central America Helical CT Scanner Market Size and Forecast (2021 - 2031)

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Abstracts

The South & Central America helical CT scanner market is projected to grow significantly, reaching an estimated US\$ 72.6 million by 2031, up from US\$ 59.4 million in 2024. This growth represents a compound annual growth rate (CAGR) of 3.0% from 2025 to 2031.

Executive Summary and Market Analysis

The helical CT scanner market in South & Central America is primarily segmented into Brazil, Argentina, and the Rest of the region. Governments in these countries are increasing investments in healthcare infrastructure to enhance access to diagnostic technologies. Public health systems are actively upgrading outdated CT units and incorporating newer, faster helical CT scanners. The rising prevalence of chronic diseases such as cancer, cardiovascular diseases (CVD), and respiratory illnesses, along with an aging population, is driving the demand for advanced imaging solutions that offer precision and high throughput. Helical CT scanners are particularly valued for their speed and detailed imaging capabilities, which are crucial for early detection and ongoing monitoring of diseases.

Technological advancements, including multi-slice CT technology, reduced radiation exposure, enhanced image resolution, and quicker scan times, are making helical CT scanners more attractive, safer, and more efficient for hospitals and diagnostic centers. Additionally, initiatives aimed at making imaging more affordable—such as government subsidies, reimbursement reforms, and public-private partnerships—are helping to lower the barriers to acquiring helical CT scanners.

Strategic Insights

Market Segmentation

The South & Central America helical CT scanner market can be segmented by type, slice type, and end user:

By Type: The market is divided into Double-Layer and Multi-Layer segments, with the Multi-Layer segment leading in 2024.

By Slice Type: The market is categorized into 1-16 Slices, 17-64 Slices, 128-160 Slices, and >160 Slices, where the 17-64 Slices segment dominated in 2024.

By End User: The market is segmented into Hospitals, Medical Centers, and Ambulatory Surgical Centers, with Hospitals being the leading segment in 2024.

Market Outlook

The integration of hybrid imaging systems, particularly those that combine computed tomography (CT) with other modalities like positron emission tomography (PET), single photon emission computed tomography (SPECT), and magnetic resonance imaging (MRI), is transforming the helical CT scanner market. This trend is driven by the need for more precise, multi-dimensional diagnostic tools that provide both anatomical and functional insights in a single scan.

Helical CT technology captures volumetric data in a single breath-hold, which minimizes motion artifacts and allows for multi-slice acquisitions. When combined with PET, which detects metabolic activity through radiotracers, hybrid PET-CT systems offer exceptional tumor localization and staging capabilities. For instance, Siemens Healthineers' Biograph Vision PET-CT integrates advanced helical CT components with time-of-flight PET technology, resulting in up to 80% improved image quality at lower radiation doses. This system has become essential in oncology, aiding in the identification of metabolically active lesions that may not be visible on standalone CT scans. Clinical studies have shown that PET-CT reduces false positives by 30%, thereby expediting treatment decisions and reducing the need for invasive biopsies.

Recent innovations such as PET-enabled Dual-Energy CT allow for the differentiation of tissue types without increasing radiation exposure. This technology, supported by institutions like UC Davis Health, utilizes PET data to create a second CT image at a

different energy level, enhancing tissue characterization in oncology and bone imaging.

CT-MRI hybrids are also addressing limitations in soft-tissue contrast. For example, GE Healthcare's SIGNA PET-MRI combines helical CT for attenuation correction with MRI's superior functional imaging, making it ideal for neurology applications. This setup excels in brain tumor assessments, where MRI delineates edema while helical CT maps vascular structures, significantly reducing scan times and radiation exposure.

Country Insights

The South & Central America helical CT scanner market is further analyzed by country, with Brazil holding the largest market share in 2024. The rising burden of cancer in Brazil is alarming, with projections indicating a 65.6% increase in cancer incidence across Latin America by 2040. In 2022, Brazil reported 627,193 new cancer cases and 278,835 cancer-related deaths, with prostate cancer being the most prevalent.

The aging population in Brazil is also a significant factor, as the number of individuals aged 60 and above is expected to rise from approximately 30 million in 2022 to nearly 50 million by 2030. This demographic shift is likely to increase the demand for monitoring technologies like helical CT scanners, especially given the high prevalence of coronary artery disease among older adults.

Brazil is also leading in healthcare technology advancements, with the highest density of CT scanners in Latin America, approximately 28 units per million inhabitants. Innovations in remote diagnostics and AI are enhancing accessibility, particularly in rural areas, and the future of helical CT technology in Brazil looks promising.

Company Profiles

Key players in the South & Central America helical CT scanner market include Koninklijke Philips NV, Canon Inc, GE HealthCare Technologies Inc, Narang Medical Limited, Neusoft Medical Systems, FUJIFILM Holdings Corp, Siemens Healthineers AG, Shanghai United Imaging Healthcare Co., LTD, NeuroLogica Corp, and SinoVision Technology (Beijing) Co., Ltd. These companies are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

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