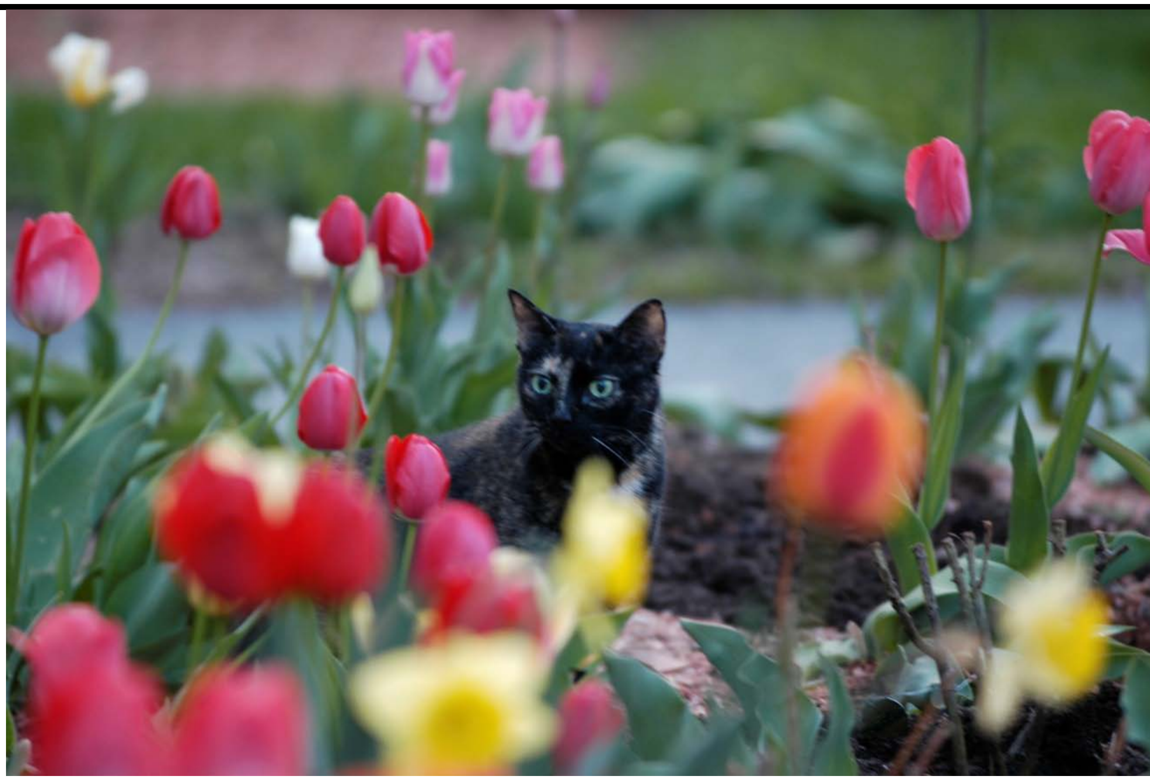
WinterGreen Research, INC.

# Computed Tomography (CT): Market Shares, Strategies, and Forecasts, Worldwide, 2013 to 2018

## Computed Tomography (CT): Health Imaging Technologies Improving Cardiac Disease Prevention, Diagnoses, and Treatment



Torrie The Cat in the Tulips Picture by Susan Eustis

WinterGreen Research, Inc.

Lexington, Massachusetts www.wintergreenresearch.com

## CHECK OUT THESE KEY TOPICS

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Computed Tomography
CT Imaging
Computed Tomography
Market Share
Computed Tomography
Market Forecasts
CT Market Share
CT Market Forecasts
Imaging Radiation Dose

64-Slice CT Equipment
Medical Imaging Quality
High Resolution Medical
Imaging
CT scans
Multi-Slice CT Imaging
Computed Tomography (CT)
Technology Development
Workflow

CT Key Trends
Cardiac CT
Oncology CT
High End imaging

## Computed Tomography (CT): High Definition Imaging Technology Evolves Emergency Room Applications

## Computed Tomography (CT): Market Shares, Strategies, and Forecasts, Worldwide, 2013-2018

**LEXINGTON, Massachusetts (February 7, 2013) – WinterGreen Research announces that it has published a new study Computed Tomography (CT) Market Shares, Strategy, and Forecasts, Worldwide, 2013 to 2018. The 2013 study has 412 pages, 185 tables and figures. Worldwide markets are poised to achieve continuing growth as CT gains significant new imaging clarity.**

**CT imaging is useful for healthcare therapeutic decision-making. Infarctions caused by stroke and extensive bleeding are types of conditions imaged. Subarachnoid hemorrhage and a ruptured aneurysm are imaged. Seeing the conditions clearly makes a huge difference in choosing between different treatment options. CT is a primary diagnostic tool in oncology. It is used to detect cancer, for oncologic treatment follow-up and in assessing the lung diseases. In emergency care, CT has become the primary test for trauma, stroke or chest pain.**

**According to Susan Eustis, lead author of the study, "Superior image quality brings clinical improvement. Physicians are thrilled when they can see what is going on so much more clearly. Market leaders in the higher-slice segments have proven superior image quality. They have pressure to prove they can incorporate effective dose-reduction techniques while maintaining image quality. High end imaging modalities require advanced image management and archival systems. The diagnostic outcome of molecular imaging is made available to clinicians. Healthcare IT and molecular imaging exploit the advantage of systems. Effective distribution of images to clinicians is needed. Integration with electronic medical records is critical."**

**This growth is driven in part by the growing popularity of independent diagnostic centers, which are increasing in number due to patient demand and the relatively low set-up cost compared to a full, multi-disciplinary hospital.**


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**Other drivers of growth include the increasing demands from governments for high quality healthcare delivery that is supported with CT imaging. Significant advances in imaging technologies promise to improve wellness through earlier and more accurate detection of medical conditions.**

**Aging population and increase in the chronic disease, congestive heart failure and diabetes in the population are considered as the main drivers of the imaging market in the developed nations. Obesity and use of statins are primary drives of chronic diseases. Lack of exercise and lack of good nutrition are underlying causes of obesity. A rising fiscal deficit is expected to inhibit the growth of CT in the developed nations.**

**CT scans help physicians determine whether curative or palliative treatment is the best course of treatment. CT works for patients for esophageal cancer. The CT market is shaped by instruments capable of high scanning speed. High scanning speed reduces examination time and radiation exposure for patients. CT is useful for managing increasing rates of cardiovascular disease and cancer. In the face of a population explosion worldwide demand for healthcare has created a need for screening and early diagnosis of cardiovascular disease and cancer conditions.**

**CT imaging radiation dose continues to be an area of concern. The industry continues to try to reduce exposure while ensuring image quality. Recent studies have centered on the correct dose for children and the obese. Worldwide, research is going to improve the current technology of CT. Two topics are the focus of clinical research: reduced radiation, and evaluation of the hemodynamic significance of coronary stenosis.**

**Growth comes as more emphasis is put on early diagnosis and prevention of disease. Heart failure patients can benefit from better imaging.**

**Computed tomography scanner markets are driven by the trend towards multi-slice scanners, the global market for computed tomography scanners is expected to post a modest growth rate. The global market for CT scanners was valued at $3.7 billion in 2012. Total market value is expected to reach $6 billion by 2019.**

**WinterGreen Research is an independent research organization funded by the sale of market research studies all over the world and by the implementation of ROI models that are used to calculate the total cost of ownership of equipment, services, and software. The company has 35 distributors worldwide, including Global Information Info Shop, Market Research.com, Research and Markets, electronics.ca, Bloomberg, and Thompson Financial.**

Key Words: Computed tomography, CT, 64-Slice CT Equipment, High end imaging Computed Tomography CT Imaging Computed Tomography Market Share Computed Tomography Market Forecasts CT Market Share CT Market Forecasts Imaging Radiation Dose 64-Slice CT Equipment Medical Imaging Quality High Resolution Medical Imaging CT scans Multi-Slice CT Imaging Computed Tomography (CT) Technology Development Workflow CT Key Trends Cardiac CT Oncology CT High End imaging

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# Companies Profiled

## Market Leaders

Siemens
General Electric / General Electric Healthcare / GE
Hitachi
Neurologica Corp.
Philips
Toshiba

## Market Participants

Acceleware
Analogic
Barco NV
Esaote Group
Neusoft Medical Systems
OptiMedica
Samsung Medison / Medison
America
Shimadzu
Steris Corporation
TomTec Imaging Systems GmbH
Unfors RaySafe

# Computed Tomography (CT): Market Shares, Strategies, and Forecasts, Worldwide, 2013 to 2018

## Report Methodology

This is the 545th report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and energy. Automated process and significant growth potential are priorities in topic selection. The project leaders take direct responsibility for writing and preparing each report. They have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases.

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The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

Forecasts reflect analysis of the market trends in the segment and related segments. Unit and dollar shipments are analyzed through consideration of dollar volume of each market participant in the segment. Installed base analysis and unit analysis is based on interviews and an information search. Market share analysis includes conversations with key customers of products, industry segment leaders, marketing directors, distributors, leading market participants, opinion leaders, and companies seeking to develop measurable market share.

Over 200 in depth interviews are conducted for each report with a broad range of key participants and industry leaders in the market segment. We establish accurate market forecasts based on economic and market conditions as a base. Use input/output ratios, flow charts, and other economic methods to quantify data. Use in-house analysts who meet stringent quality standards.

Interviewing key industry participants, experts and end-users is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2010. With 2010 and several years prior to that as a baseline, market projections were developed for 2011 through 2017. These projections are based on a combination of a consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective.

The analytical methodologies used to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

This research includes reference to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

**YOU MUST HAVE THIS STUDY**

**Computed Tomography (CT): Market Shares, Strategies, and Forecasts, Worldwide, 2013-2019**

## Table of Contents

### Computed Tomography (CT) Executive Summary

**The study is designed to give a comprehensive overview of the Computed Tomography (CT) equipment market segment. Research represents a selection from the mountains of data available of the most relevant and cogent market materials, with selections made by the most senior analysts. Commentary on every aspect of the market from independent analysts creates an independent perspective in the evaluation of the**

**market. In this manner the study presents a comprehensive overview of what is going on in this market, assisting managers with designing market strategy likely to succeed.**



## Computed Tomography (CT) Market Description and Market Dynamics



## Computed Tomography (CT) Market Shares and Market Forecasts

**This section selectively describes market shares, forecasts, segments, and regional revenue. Numbers are the result of primary research in all cases. Selected company are described from an independent analyst perspective with a thumbnail sketch or analysis of their market numbers or commentary on their strengths and weaknesses. Some of the analysis is focused on looking at the topic segment by segment, including company descriptive analyses by segment and subsegment.**

# Computed Tomography (CT) Product Description

**This section describes selected company and selected** products. **Products for this market segment are described with attention to the most significant aspect of features and functions in this category of product. The juxtaposition of a range of different product descriptions from a single market category provides a really good way to access market directions and achieve market competitive analysis. This section is arranged in three pieces: immersive products, conference room products, and end point products. Company products are described in the appropriate sections, meaning a company is mentioned several times in the chapter in different places. 3-1**

## Computed Tomography (CT) Technology

# Computed Tomography (CT) Company Profiles

**This section selectively describes company strategy, partners, acquisitions, and revenue by segment and regional revenue when available. Company are described by looking at what is most interesting about that company. The descriptions collectively give a sense of market directions within the industry segment. The alphabetical listing of company thumbnail sketches provides an accessible way to find out what is going on in any particular company.**

# List of Tables and Figures

## Computed Tomography (CT) Executive Summary



## Computed Tomography (CT) Market Description and Market Dynamics



## Computed Tomography (CT) Market Shares and Market Forecasts

## Computed Tomography (CT) Product Description

Brain GBM

## Computed Tomography (CT) Technology



## Computed Tomography (CT) Company Profiles



# ABOUT THE COMPANY

**WinterGreen Research**, research strategy relates to identifying market trends through reading and interviewing opinion leaders. By using analysis of published materials, interview material, private research, detailed research, social network materials, blogs, and electronic analytics, the market size, shares, and trends are identified. Analysis of the published materials and interviews permits WinterGreen Research senior analysts to learn a lot more about markets. Discovering, tracking, and thinking about market trends is a high priority at WinterGreen Research. As with all research, the value proposition for competitive analysis comes from intellectual input.

**WinterGreen Research**, founded in 1985, provides strategic market assessments in telecommunications, communications equipment, health care, Software, Internet, Energy Generation, Energy Storage, Renewable energy, and advanced computer technology.

Industry reports focus on opportunities that expand existing markets or develop major new markets. The reports access new product and service positioning strategies, new and evolving technologies, and technological impact on products, services, and markets. Innovation that drives markets is explored. Market shares are provided. Leading market participants are profiled, and their marketing strategies, acquisitions, and strategic alliances are discussed. The principals of WinterGreen Research have been involved in analysis and forecasting of international business opportunities in telecommunications and advanced computer technology markets for over 30 years.

The studies provide primary analytical insight about the market participants. By publishing material relevant to the positioning of each company, readers can look at the basis for analysis. By providing descriptions of each major participant in the market, the reader is not dependent on analyst assumptions, the information backing the assumptions is provided, permitting readers to examine the basis for the conclusions.

## About The Principal Authors

**Ellen T. Curtiss**, Technical Director, co-founder of WinterGreen Research, conducts strategic and market assessments in technology-based industries. Previously she was a member of the staff of Arthur D. Little, Inc., for 23 years, most recently as Vice President of Arthur D. Little Decision Resources, specializing in strategic planning and market development services. She is a graduate of Boston University and the Program for Management Development at Harvard Graduate School of Business Administration. She is the author of recent studies on worldwide telecommunications markets, the top ten internet equipment companies, the top ten contract manufacturing companies, and the Top Ten Telecommunications market analysis and forecasts.

**Susan Eustis**, President, co-founder of WinterGreen Research, is a senior analyst. She has done research in communications, healthcare equipment, and computer markets and applications. She holds several patents in microcomputing and parallel processing. She has the original patents in electronic voting machines. She has new patent applications in format varying, mulitprocessing, and electronic voting. She is the author of recent studies of the Regional Bell Operating Companies' marketing strategies, Internet equipment, biometrics, a study of Internet Equipment, Worldwide Telecommunications Equipment, Top Ten Telecommunications, Digital Loop Carrier, Web Hosting, Web Services, and Application Integration markets. Ms. Eustis is a graduate of Barnard College.

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