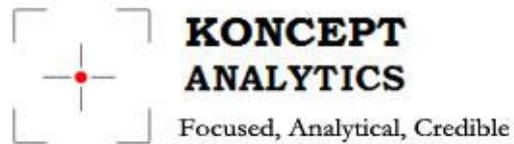


Global Medical Imaging Market Report

2013



Executive Summary

Medical imaging equipments primarily find application in obtaining images of internal body organs, tissues by using non-invasive methods. Commonly used imaging equipment includes X-ray, ultrasound, computed tomography (CT), positron emission tomography (PET), magnetic resonance imaging (MRI), nuclear medicine, mammography and fluoroscopy. The global medical imaging equipment market has grown at a healthy pace over the past few years owing to rising ageing population, expanding middle class, advances in functional imaging, healthcare reforms and improved supply in emerging markets. North America is the largest market having one-fourth share of total market followed by Europe, Japan and China. Ultrasound and MRI are the largest market segments based on sales revenue in 2012. Hybrid imaging systems like PET-MRI, PET-CT that combines several image modalities into one system is a key trend in medical imaging.

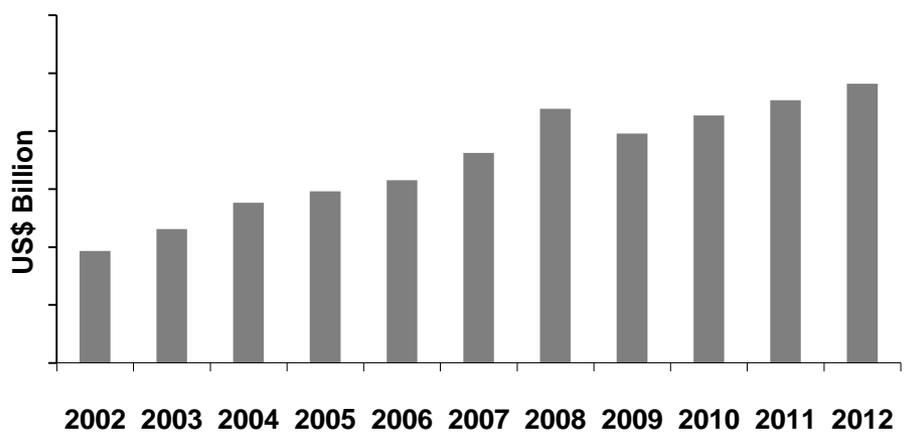
Increased Government funding on improving healthcare facilities in emerging markets like India, China and Russia has offered huge opportunity for suppliers/manufacturers. To compete in Asian markets, many foreign imaging companies are creating midrange devices with lower price points. Imaging equipment market in mature regions like North America and Europe was affected by financial instability and reimbursement cuts in 2012. Key issues in the market include strict regulation, limited provider budgets, high initial investment and shortages of radiologists. The major players in the global medical imaging market include General Electric, Siemens, Philips, and Hitachi Medical.

This report analyzes the global medical imaging equipment market with focus on sub-segments like PET, Ultrasound and contrast agents. Regional analysis of APAC region and the US are also given in detail. The report presents some of the major drivers and challenges being faced by the industry. It also analyzes the competitive scenario of the market. The profiles of four major players GE, Siemens, Hitachi and Philips are being included in the report.

By combining SPSS Inc.'s data integration and analysis capabilities with our relevant findings, we have predicted the future growth of the industry. We employed various significant variables that have an impact on this industry and created regression models with SPSS Base to determine the future direction of the industry. Before deploying the regression model, the relationship between several independent or predictor variables and the dependent variable was analyzed using standard SPSS output, including charts, tables, and tests.

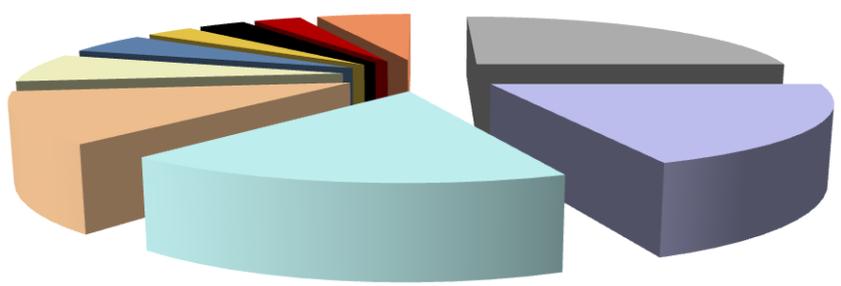
Rising ageing population, healthcare expenditures and technological advances have created demand for Medical Imaging Equipment worldwide.....

Global Medical Imaging Equipment Market Size (2002-2012)



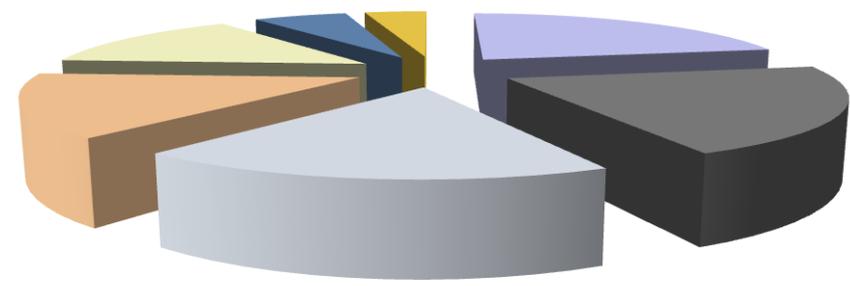
- The global medical imaging equipment market increased from US\$..... billion in 2009 to US\$..... billion in 2012.
- Some of the emerging trends in the industry include the merging of different imaging modalities, a shift from film-based to digital radiography, growing popularity of portable medical imaging technologies, and the introduction of cloud computing in the medical imaging market.
- North America is the largest market for medical imaging equipment with an overall share of% followed by Europe, Japan, China, Latin America, Russia, MEA, India and Australia having shares of%,%,%, ...%,%, ...%, ...% and% respectively in 2012.
- In 2012, Ultrasound accounted for% of the total medical imaging market, followed by MRI with%, and CT with ...%.

Geographical Segmentation of Global Medical Imaging Market (2012)



- | | | |
|---------------|---------------|-----------|
| North America | Europe | Japan |
| China | Latin America | Russia |
| MEA | India | Australia |
| Rest of Asia | | |

Global Imaging Market Segmentation by Modality (2012)

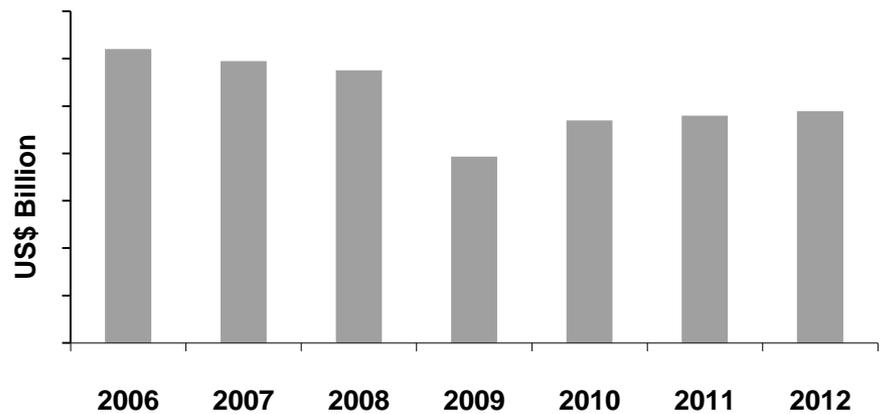


- | | |
|---------------------|----------------------|
| Ultrasound | MRI |
| Computed Tomography | Interventional X Ray |
| Diagnostic X Ray | Nuclear Medicine |
| Mammography | |

The US is the world's largest market for medical imaging equipment and is mainly driven by replacement

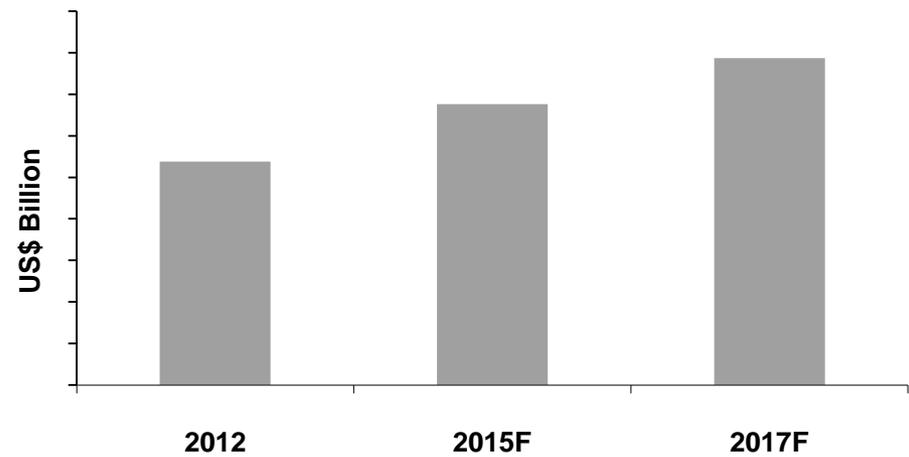
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The US Medical Imaging Equipment Market Size (2006-2012)

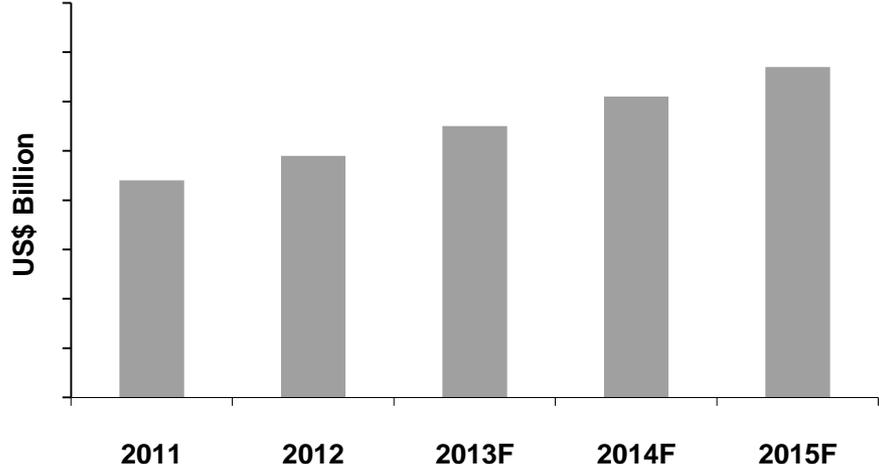


- The US market for new imaging equipment for MR, CT, ultrasound, PET and X-ray remained flat in 2012 compared to previous year. The market revenues increased by only% and reached US\$... billion in 2012.
- The Brazilian medical imaging market generated US\$..... million in 2012 and is forecasted to grow at a CAGR of% over the period 2012-2017.
- The medical imaging equipment market in APAC was worth US\$.... billion in 2012 and is forecasted to grow at a CAGR of% over the period 2011-2015.
- The overall medical imaging equipment market in China reached US\$.... billion in 2012 and is forecasted to grow to US\$..... billion by 2015.

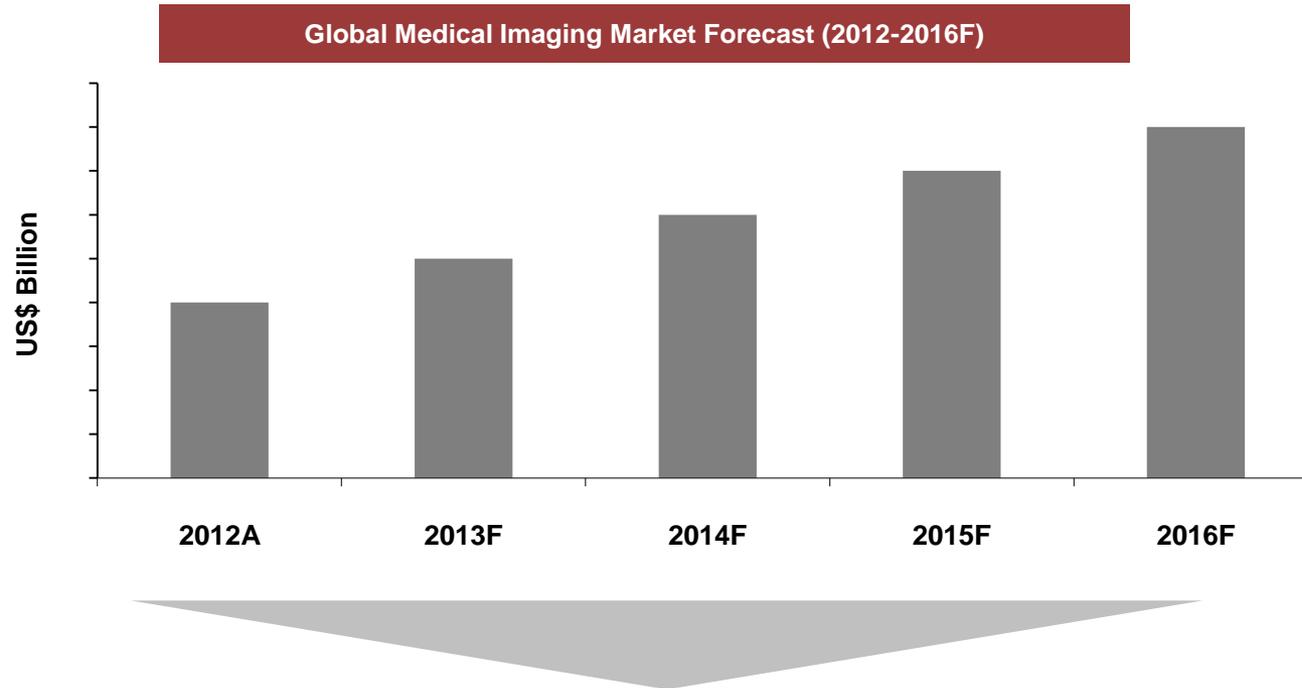
Brazilian Medical Imaging Market (2012-2017F)



APAC Medical Imaging Equipment Market (2011-2015F)



Rising Government reimbursements in emerging countries, ageing population and innovation of new technologies will drive the market in future...



- The global medical imaging equipment market is forecasted to grow at a CAGR of% over the period 2012-2016 and will reach US\$.... billion. The market will be driven by developing countries like China, India and Russia where rising ageing population, increasing disposable income and innovation of new technologies will be contributing to the growth in coming years.
- Additionally, government reimbursement for diagnostic imaging procedures has significantly increased across Asia.
- Also fusion technologies like SPECT/CT, PET/CT will be the prime factors driving this market due to their enhancement in the quality of images that can improve diagnosis.