India Computed Tomography - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The India Computed Tomography Market is expected to register a CAGR of 7.1% during the forecast period.

The COVID-19 pandemic had an impact on the Indian computed tomography market initially, with the decrease in the volume of diagnostic imaging such as computed tomography due to the massive influx of COVID-19 patients, lockdowns, and restrictions on non-urgent diagnostic procedures in hospitals. For instance, according to a study published in the Indian Journal of Radiology and Imaging in January 2021, radiology practices witnessed a significant over 60%-70% decline in imaging volumes amid the pandemic. Although, during the pandemic, the importance of chest computed tomography (CT) scans for COVID-19 patients increased, which boosted the demand for CT systems in India. Moreover, in the post-pandemic period, the number of COVID-19 patients decreased in India, which led to the resumption of the CT imaging of non-COVID and non-urgent medical cases. Thus, the pandemic had a slight negative impact on the Indian computed tomography market initially. However, the resumption of CT imaging diagnosis for other diseases enabled the need to grow generally in India.

The country has an increasing burden of chronic diseases and expanding geriatric population, which are expected to create a higher demand for CT systems for the diagnosis of highly prevalent chronic diseases such as tuberculosis, cancer, human immunodeficiency viruses (HIV), and other. For instance, as per the data published by the National AIDS Control Organization in 2021, the incidence of HIV was observed to be 62,967 cases 2021 in India. Further, the data published by the TB Facts Org in 2021, over 2.59 million new cases of HIV and tuberculosis were observed in 2021 in India. Also, as per the study published by the Indian Journal of Medical Research in 2022, the estimated number of incident cancer cases in India was found to be 1.46 million in 2022 in India. The same source further stated that one in nine people is expected to develop cancer in their lifetime, and lung and breast cancers were the leading cancer sites in males and females, respectively. With the increasing prevalence of tuberculosis, HIV, cancer, and other diseases, the patient base for these chronic diseases is expected to expand, which is likely to drive the

high demand for CT imaging diagnosis and boost the market growth in the coming years.

Also, the technological advancements in computed tomography of imaging intelligence and high accuracy are expected to tap more patients in the county with its advanced features and improvisations. For instance, in April 2022, Wipro GE Healthcare launched its next-generation Revolution Aspire CT (Computed Tomography) scanner in India, the made-in-India CT scanner. The CT scanner is an advanced imaging solution with higher imaging intelligence and increased operational efficiency with up to 50% higher throughput. With the launching of such advanced and efficient CT systems, the availability of CT devices will increase in the country, tapping the unmet needs of the patient base in India and boosting market growth in the coming years.

Furthermore, the increasing investment into the healthcare infrastructure will also propel the market's growth as it will enable healthcare facilities to adopt more CT systems to meet the demand of the patients. For instance, in August 2022, the prime minister of India inaugurated a 300-bed Homi Bhabha Cancer Hospital and Research Centre at Mullanpur in Punjab, India. Further, in April 2022, South Asia's largest cancer care network was launched in Assam with the inauguration of seven hospitals dedicated to treating the disease in Assam. Also, per the data published by the Finance Ministry of India, over INR 86,606 crore (USD 105.05 million) was allocated for healthcare expenditure in the Union Budget 2022-2023. This showed an increase of 16%, compared to the allocated budget of INR 74,602 crore (USD 90.49 million) in the financial year of 2021-2022.

Therefore, with the rising burden of chronic diseases, technological advancements in computed tomography, and increasing investment in healthcare infrastructure, the studied market is anticipated to grow over the analysis period. However, the high cost associated with CT scan devices and procedures will likely impede market growth.

India Computed Tomography (CT) Market Trends

Neurology Segment is Expected to Witness Significant Growth Over the Forecast Period

The neurology segment includes neurological disorders such as multiple sclerosis, Alzheimer's, Dementia, and others diagnosed by computed tomography imaging. CT scanning of the brain enables to differentiate of the brain area affected by the disorder.

The neurology segment is expected to grow during the forecast period with the high burden of neurological disorders and the advancing research of neurological diseases' diagnosis using CT systems. For instance, per the data published by the Organization for Economic Cooperation and Development (OECD) in 2021, over 5.3 individuals in every 1,000 people in India were reported to have Dementia 2021. The same source stated that this number is expected to increase to 11.8 individuals in every 1,000 people in India by 2050. With such a vast patient base of Dementia in India, the demand for CT systems for diagnosing and researching the abovementioned neurological disease will increase, boosting the segment's growth.

Research studies by Indian researchers have underlined the technological advancements in CT imaging for neurological disease diagnosis, which are expected to attract more growth opportunities for the segment. For instance, a study published in the journal Postgraduate Medical Journal in January 2022 demonstrated the high potential of cerebral perfusion CT (PCT) for the early diagnosis of Dementia. The study stated that the PCT is a reliable imaging modality for early diagnosis of Dementia and in differentiating vascular Dementia from Alzheimer's disease. Such studies can improve the diagnosis and the early detection of difficult-to-diagnose neurological conditions. These factors are expected to tap the unmet diagnosis needs of the patient base and boost the segment's growth.

Also, investments by the public and private bodies in neurology research are on the rise, creating more demand for CT systems in the country and boosting market growth. For instance, in June 2022, the Centre for Brain Research (CBR) in Karnataka, India, was inaugurated. The research facility will combine the approach of imaging, genetics, cognition, and computational methods to address the complex challenges of understanding brain functioning in health and disease. Further, in February 2023, Infosys

signed a memorandum of understanding (MoU) with the Indian Institute of Science (IISc) and the Centre for Brain Research (CBR), an autonomous Centre of IISc located on the Institute campus, to support fundamental and translational research on neurodegenerative diseases of the elderly population.

Therefore, the neurology segment is expected to witness significant growth over the forecast period due to the high burden of neurological disorders and advancing research.

Hospital Segment is Expected to Witness Significant Growth Over the Forecast Period

Hospitals in India deliver comprehensive health care services, including curative, promotive, rehabilitative, and preventive services, to the vast patient pool of the country. Hospitals are well-equipped with necessary and advanced equipment, infrastructure, and qualified medical staff to manage and perform computed tomography examinations effectively.

The hospitals' segment is expected to grow with its advanced CT imaging system and facilities, capacity to handle vast numbers of patients, and the strategic developments the hospitals take to leverage computed tomography examinations in India. These factors are anticipated to increase the penetrance of computed tomography in India and boost market growth.

In the past few years, several hospitals in India have strategically decided to install more CT systems to meet the demands for diagnostic imaging in India. For instance, in July 2022, Dr. LH Hiranandani Hospital in Mumbai, India, installed the advanced 384 Slice Cardiac CT scan machine. The CT machine has advanced AI-based technology, which improves the accuracy and clarity of the CT diagnosis three times and assists the cardiologists/cardiac surgeons on the other line of treatment to the patients. Similarly, in September 2022, a CT scan machine worth INR 5 crore (USD 0.61 million) was installed at the Civil Hospital of Phagwara, India. Thus, with the increasing installation of CT scanning systems in the hospitals of India, market penetration is expected to increase further in Indian hospitals to meet the soaring needs of patients.

Therefore, the hospital segment is expected to witness significant growth over the forecast period due to the increasing installation of CT systems at Indian hospitals, the growing investments in the hospital infrastructure, and the rising number of hospitals.

India Computed Tomography (CT) Industry Overview

The computed tomography (CT) market is consolidated due to the presence of a few major players. The key players operating in the market include, Siemens Healthineers AG, Koninklijke Philips N.V., GE Healthcare, Canon Medical Systems Corporation, and Fujifilm Holdings Corporation.

Additional Benefits:

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Table of Contents:

1 INTRODUCTION
1.1 Study Assumptions and Market Definition
1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS
4.1 Market Overview
4.2 Market Drivers
4.2.1 Increasing Burden of Chronic Disease and Growing Geriatric Population
4.2.2 Technological Advancements in Computed Tomography
4.2.3 Increasing Investment in Healthcare Infrastructure
4.3 Market Restraints
4.3.1 High Cost Associated With CT Scan Devices and Procedure
4.4 Porter's Five Forces Analysis
4.4.1 Threat of New Entrants
4.4.2 Bargaining Power of Buyers/Consumers
4.4.3 Bargaining Power of Suppliers
4.4.4 Threat of Substitute Products
4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)
5.1 By Type
5.1.1 Low Slice
5.1.2 Medium Slice
5.1.3 High Slice
5.2 By Application
5.2.1 Oncology
5.2.2 Neurology
5.2.3 Cardiovascular
5.2.4 Musculoskeletal
5.2.5 Other Applications
5.3 By End User
5.3.1 Hospitals
5.3.2 Diagnostic Centers
5.3.3 Other End Users

6 COMPETITIVE LANDSCAPE
6.1 Company Profiles
6.1.1 Canon Medical Systems Corporation
6.1.2 Fujifilm Holdings Corporation
6.1.3 GE Healthcare
6.1.4 Koninklijke Philips NV
6.1.5 Siemens Healthineers
6.1.6 CareStream Health
6.1.7 Planmed Oy
6.1.8 Shimadzu Corporation
6.1.9 Samsung Electronics Co., Ltd (NeuroLogica)
6.1.10 Medirays Corporation
6.1.11 Allengers Medical Systems Limited
6.1.12 Carestream Health India

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