

## Diagnostic Ultrasound in India: Well-Poised for Growth

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Over the years, Ultrasound modality has grown leaps and bounds in India to become an inevitable part of Healthcare delivery in the country and is well-poised for strong growth. Currently, the market size of Ultrasound is about INR 1400 Crore with a CAGR of 6 to 7 %. When we look at the Super Value and Value segments, increased growth is expected and traditionally, the buyers in this segment are Upgrades from Black & White Ultrasound & Basic entry level Color Doppler users, first time buyers in Tier II & III Locations where the technology penetration in Healthcare delivery is still low. With Government initiatives like Ayushman Bharat, we expect a major spike in growth of Super Value and Value segments of Ultrasound in such locations and they will contribute to a major portion of the Market in the coming years.

Growth in the mid segment of Ultrasound is contributed by purchases in Mid to Large Nursing Homes & Multi-Speciality Hospitals in Tier I & II Locations and Upgrade buyers from Value segment. The Users in this segment look for feature rich equipments as most of them are usually at the Prime of their Clinical Practice. Fetal Medicine & IVF applications are driving growth in this segment. Overall, Entry Level & Mid Level Products constitute more than 60% of the Ultrasound Market in India.

High-end Ultrasound market is largely driven by Upgrades, Diagnostic Centres and Corporate Hospitals. The Customers of this segment usually own a well known diagnostic centre or a Hospital and look for versatile equipments that are suitable for multiple applications as this enables them to offer single point solutions to their Patients and delivers better ROI for their Hospital or Diagnostic Centre. There is visible shift in the customer preferences towards high-end technology and superior quality imaging for better clinical diagnosis and we are already witnessing a remarkable growth in the Market share of high-end Ultrasounds.

The Premium segment of Ultrasound contributes to less than 10% of the market and purchase in this segment is majorly contributed by Enterprise Hospitals, Super Speciality Private, Diagnostic Centres & Government Hospitals and Medical Colleges.

The unique aspect of Ultrasound modality is that it is non-invasive, radiation-free and has wide applications beyond Radiology, Cardiology, and Obstetrics & Gynaecology. The Intra-Operative Ultrasound equipments are crucial for care delivery in various Clinical scenarios like Robotic Surgery, Urology, Neurosurgery, Surgical Gastro & Surgical Oncology and Ultrasound market is growing at a rapid pace in High-end and Premium segments due to such speciality applications.

Hospitals increasingly prefer dedicated Intra-Operative Ultrasound machines that are compatible with common disinfectant methods, for safe use in the operating room. The Market for High-end Portable Ultrasound is seeing rapid growth because of Preferences for high technology machines with superior image quality and easy workflow features like Touch Screen display Monitors. The Market for Veterinary Ultrasound is shifting from mid end to High-end Ultrasound technology.

Overall, the Ultrasound Market in India is poised for strong growth in the coming years and this will definitely lead to improved healthcare delivery in every part of the country.

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