

# Gastrointestinal Endoscopy Systems & Instruments Worldwide

*A Market Strategy Report*

## Report Highlights

March 2006

# Report Benefits

This report can help executives in:

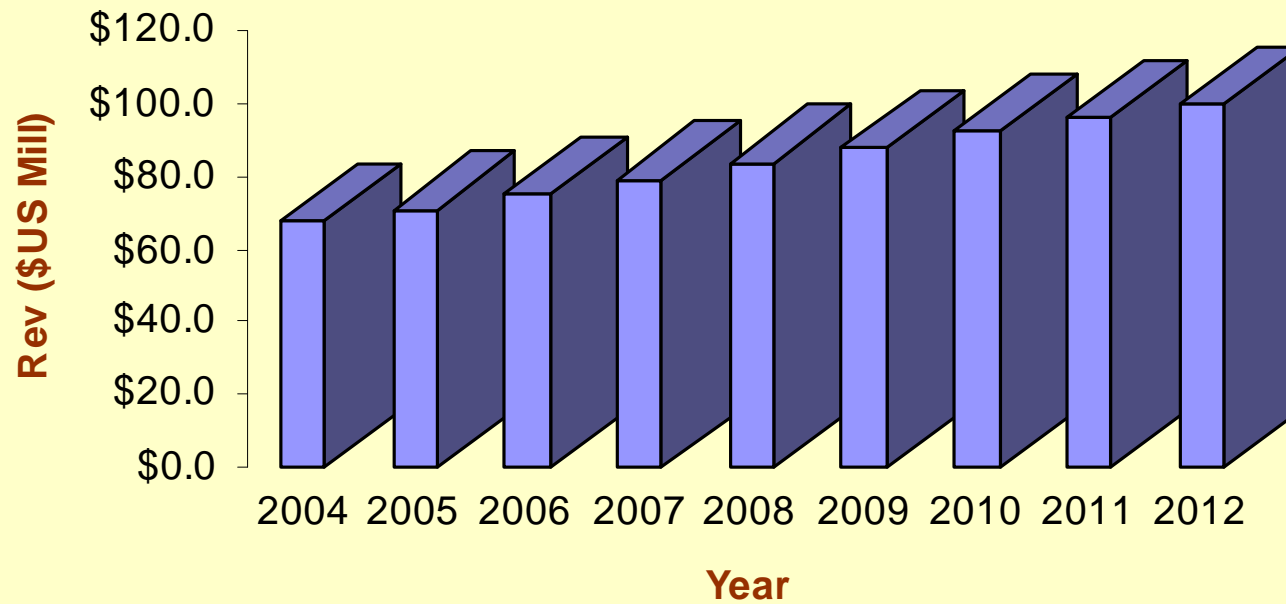
- Assessing the market for GI Endoscopy Systems and Surgical Instruments, growth segments, and growth regions.
- Understanding market drivers and restraints.
- Business planning, strategic decision making and competitive strategy.
- Identifying opportunities for partnerships and alliances.

# Key Takeaways

- The largest market segment is GI Endoscopes/ Videoscopes, while the fastest growing segment is Capsule Endoscopy.
- Virtual Colonoscopy (CT Colonography) is generating increasing interest, but growth has been held back because of lack of reimbursement.
- Market Leaders: Boston Scientific, Olympus Corp., Cook Endoscopy, US Endoscopy, CONMED, Funjinon, and Pentax. Given Imaging has emerged as a key player with its innovative Capsule Endoscopy offering.

# French Market – 2006 (E)

**French GI Endoscopy Eqpt. Market (2004-2012)**



# Competitor Segmentation

Mkt. Presence	Detail	Example
<b>GI Endoscope/ Videoscopes</b>	Companies involved in the design, development, manufacture and marketing of various types of GI Endoscopes, Videoscopes, and related peripherals.	Olympus, Fujinon, Pentax
<b>Endoscopic Surgical Instruments</b>	Companies offering a broad range of endoscopic surgical instruments covered in this report.	Boston Scientific, Olympus, Cook Endoscopy, US Endoscopy, CONMED, Richard Wolf, Medi-Globe GmbH, Medtronic, Curon
<b>Capsule Endoscopy</b>	Companies making ingestible imaging capsules, recorders and workstations for image analysis and processing.	Given Imaging, recent entrant Olympus
<b>Virtual Colonoscopy</b>	Companies making CT/MRI scanners, colonic image analysis software, CAD software, and patient preparation products.	GE Healthcare, Siemens, Shimadzu, E-Z-EM, Vital Images, Tera Recon, iCAD, MedicSight, Merge eMed, Viatronix
<b>Diversified Medical Device/Eqpt. Companies</b>	Companies offering a broad array of products and solutions for multiple segments of the medical device and equipment market	Boston Scientific, Olympus, Cook Surgical, CONMED, Ethicon-Endosurgery, Guidant, Medtronic, AngioDynamics
<b>Multi-Sector Businesses</b>	Companies catering to medical and other industries	GE, Siemens, Philips
<b>Distributors</b>	Large suppliers of hundreds of medical products (some internally manufactured); some may be providing supply chain management solutions to hospital networks	
<b>Consulting Services</b>	Consulting services for endoscopy suite management and best practices.	Olympus

# Lower GI Endoscopy

## Widely Adopted Advances

Image Quality, Distal Tip Maneuverability, Hand Control Ergonomics, Biopsy Technology, Surgical Procedures, and Video (image enhancement).

## Recent Advances

3-D Imaging Techniques, Virtual Vision, CT Colonography, Endoscopic Ultrasound.

# Virtual Colonoscopy Opportunities

- Quick procedure, minimal patient discomfort.
- Improved detection, better for patients with intestinal occlusions.
- Improved processing efficiency from new software technology.
- Emergence of multi-slice CT for improved imaging and computer-aided detection
- Availability of stool tagging agents for tagging remaining feces particles and automatic removal through computer segmentation.
- Increase in the number of 3<sup>rd</sup> party workstations and declining technology costs, with integrated software/workstation offerings starting at \$75,000.
- Independent CT scan centers as well as hospital-based imaging centers driving demand.

<b>Regions Covered</b>	USA, France, Germany, Italy, UK, Rest of Europe, Japan, and Rest of the World.
<b>Product/Market Segments</b>	Gastrointestinal Endoscopy Systems and Instruments (10 segments)
<b>Companies Profiled</b>	75+
<b>Market Estimates/ Forecasts</b>	Estimates/Forecasts for 2004-2012 in US dollars, separately by Device Type and by Region.
<b>MARKETSTRAT Analytical Framework</b>	Drivers and Restraints; KPPI Grid (Key Product Performance Indicators); Competitive Framework; SRCE Framework; Key Market Parameters (KeyMAP Grid)
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