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Virtual Colonoscopy Market Expected to Rise Rapidly

Kamran Zamanian, PhD
03/29/2010

The number of virtual colonoscopy procedures performed in the United States is expected to increase through 2014. Growth in the over-50-years-of-age demographic will drive procedure volumes in this market. In addition, public awareness of colon cancer and the importance of early detection are encouraging people to receive regular screenings.

As the number of virtual colonoscopy procedures increases, the market for virtual colonoscopy software is also expected to increase, with companies such as General Electric (GE) leading the change. However, prices are estimated to decrease as competition within the virtual colonoscopy software market intensifies.

About Virtual Colonoscopy

Virtual colonoscopy is a less-invasive alternative to conventional colonoscopy for the screening of polyps, neoplasms and colon cancer. Images are taken with either a computer tomography (CT) scanner or magnetic resonance imaging (MRI) equipment and, unlike conventional colonoscopy, patients do not need to be sedated.

However, virtual colonoscopy procedures can cause discomfort, as patients must still ingest a cleansing solution and a barium contrast agent as well as have the colon inflated with air. Additionally, if polyps are detected, patients must undergo a further conventional colonoscopy procedure to remove them. However, recent trials have shown that virtual colonoscopy yields similar results to conventional colonoscopy, as indicated by a similar number of polyps removed in trials comparing the two methods. As a purely diagnostic procedure, virtual colonoscopy is considered an appealing alternative by many who wish to avoid the discomfort of a conventional procedure.

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Associated Equipment

Virtual colonoscopy is generally associated with CT devices but can also be conducted using MRI software. Software packages first appeared on the market in 2003 and are now commonly included in sales of new CT machines. A four-slice machine is required to perform an adequate scan, but a 16-slice machine is preferred to produce acceptable images. Depending on the manufacturer, the software is updated as often as twice a year and as infrequently as once every two years. Maintenance updates are commonly offered to customers free of charge or as part of existing contracts and do not add significant revenue to the virtual colonoscopy market.

Use as an Adjunct to Conventional Colonoscopy

Although it is often performed in lieu of a conventional colonoscopy, virtual colonoscopy is useful in cases where the conventional endoscopic procedure is aborted after a patient is admitted for examination. Approximately five percent to 10 percent of such procedures are routinely aborted due to patient discomfort, hernias, impediment of the endoscope by a highly twisted colon path or the presence of post-operative adhesions.

In such cases, patients are already prepared for the colonoscopy procedure and can be quickly prepared for virtual imaging. This is contingent on the correct application of the barium contrast agent, which may be hindered by the presence of air left over from the failed conventional colonoscopy procedure. However, any such remaining air is also useful in preparation for the virtual colonoscopy because less additional air is required to distend the colon.

Virtual Colonoscopy Procedures

In 2004 and 2005, there was substantial growth in the number of virtual colonoscopy procedures performed. However, this growth slowed due to the American College of Radiology Imaging Network's announcement that they were undertaking trial 6664 to re-evaluate the procedure. The results of the trial were discussed at the Boston Colonoscopy Show at the end of 2007 and were found to be highly favorable. The trial found that virtual colonoscopy was 85 percent to 95 percent as sensitive in detection as conventional colonoscopies, which surpassed most people's expectations.

Virtual colonoscopy was widely expected to take three additional years to recover its prior procedure volumes. Legislation was introduced to expand Medicare coverage to include virtual colonoscopy procedures but will not come into effect until 2010. At that time, healthy market growth is expected. In 2009, less than 1 percent of all colonoscopy procedures were performed via virtual colonoscopy.

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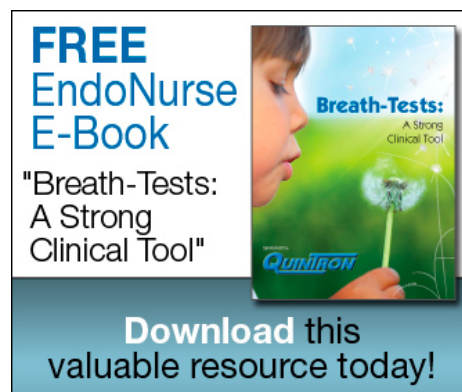
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Market Forecast

In 2009, the U.S. market for virtual colonoscopy software was valued at \$85 million, representing an increase of 4.6 percent over 2008. With the recent publication of the ACRIN-6664 trial results, it is expected that virtual colonoscopy will show continued growth over the forecast period. However, the average selling price per software unit will decrease because of the effects of competition.

Virtual colonoscopy software does not typically generate business through standalone sales but is often sold as one element in a larger CT system. The installed base of the software has benefited greatly from the practice of software bundling with new imaging systems. The market will grow, but not through a significant increase in the number of units sold. Rather, reimbursement will be the most important driver of future sales, resulting in increased procedure volumes and renewed manufacturer interest in producing software products.

Leading Competitors

GE was the leading provider of virtual colonoscopy software in 2009. Although there are many software providers, the top six companies accounted for 95 percent of total revenue generated that year.

While some virtual colonoscopy software packages are transferable between different CT machines, most are sold as integrated solutions with a CT machine provider. Software bundling has been an industry trend in system sales. The more software that is bundled with a CT system, the greater the potential functionality and attractiveness to the purchasing organization.

Limiting Factors

Virtual colonoscopy is closely tied to issues affecting the use of CT imaging. Two main pervasive issues are patient safety and billing practices. The prevailing acceptance of patient irradiation closely affects the use of virtual colonoscopy. In places where there are initiatives or public concerns about the amount of radiation that patients are exposed to, the number of virtual colonoscopy procedures tends to be lower. In contrast, conventional colonoscopy procedures do not expose patients to potentially harmful radiation and are considered the diagnostic gold standard. The second major and most pertinent limiting factor is the reimbursement associated with the procedure.

Currently, there is no Current Procedural Terminology (CPT) code associated with virtual colonoscopy. However, limited funding does exist for those who cannot tolerate a standard colonoscopy examination. This is a significant limiting factor for the virtual colonoscopy market, as manufacturers tend to invest in procedures that are reimbursed.

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Potential Market

The potential market for virtual colonoscopy in the United States is sizeable given that the procedure currently constitutes less than one percent of all colonoscopy screenings and all adults over the age of 50 are recommended to undergo screenings every five to 10 years.

As of 2009, more than 50 percent of this population had colonoscopy procedures performed on a regular basis. Although the percentage of the population that undergoes screenings is expected to increase substantially, the number of people over 50 is also increasing and is expected to reach 112.4 million by 2014.

Notwithstanding the scope of the potential market, virtual colonoscopy is not expected to exceed the popularity of conventional colonoscopy, as conventional colonoscopy does not require large capital purchases and has a dual diagnostic and interventional nature. However, many imaging sites in the U.S. already have the capability for virtual coloscopy; therefore, the adoption of the procedure as a mainstream technique is expected to surge once insurance companies approve reimbursement.

*The information contained in this article is taken from a detailed and comprehensive report published by iData Research (www.idataresearch.net) on the "U.S. Market for Gastrointestinal Endoscopic Devices 2010," which is available for purchase from iData Research. iData Research is an international market research and consulting firm focused on providing market intelligence for the medical device, dental and pharmaceutical industries. For a free synopsis of the above report, contact iData Research at: endo@idataresearch.net.

Dr. Kamran Zamanian, president, founding partner and CEO of iData Research Inc., has spent more than 20 years working in the market research industry. iData Research is an international market research and consulting group that provides market intelligence to the medical device, dental and pharmaceutical industries.

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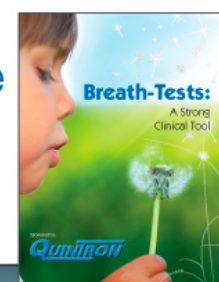


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