

**Artificial Intelligence in Healthcare Market by Offering (Hardware, Software, Services), Technology (Machine Learning, NLP, Context-aware Computing, Computer Vision), Application, End User and Region - Global Forecast to 2028**

Market Report | 2023-02-02 | 292 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The AI in Healthcare Market is projected to grow from USD 14.6 Billion in 2023 to USD 102.7 Billion by 2028; it is expected to grow at a CAGR of 47.6% during the forecast period. Increasing requirements of improvised healthcare services due to the imbalance between healthcare workforce and patients will propel the growth opportunities for AI in Healthcare providers. Increasing focus on developing human-aware AI systems will boost market growth. Lack of skilled AI workforce and ambiguous regulatory guidelines for medical software will restrain the market growth.

"Market for services to grow at higher CAGR during forecast period"

Installation services allow the software to be integrated with the analytics side to enable data retrieval and generate desired results through computation. Using computer systems for AI increases the amount of work involved in the installation. For instance, IBM Watson Health, an AI system that requires installation. Before the installation, the system's requirements are checked, such as OS compatibility, necessary software, adequate memory, and hard disk space. IBM provides a separate installation program for the ICA studio, which is used to create and deploy custom text analytics for Watson Content Analytics applications.

"Market for deep learning in machine learning segment to hold for the majority of share in 2028"

Deep learning is a class of machine learning based on multiple algorithms for creating relationships among data. Deep learning uses artificial neural networks to learn multiple levels of data, such as texts, images, and sounds. Its algorithms help in identifying patterns from a set of unstructured data.

Deep learning technology is used in voice recognition, fraud detection, voice search, recommendation engines, sentiment analysis, image recognition, and motion detection, among others. Imaging, diagnostics, and drug discovery are among the

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

applications using deep learning. There is a need for advanced technologies to read and interpret images (X-rays, MRIs, and CT scans) and blood and tissue reports, and provide an accurate and quick diagnosis for critical ailments (e.g., tumors and cancers).

"Market for patients to grow at highest CAGR during forecast period"

The popularity of AI-based solutions is increasing among patients. ML, cognitive computing, NLP, Context-aware Computing, and computer vision are increasingly being used in smartphones and homecare systems; with the rapid evolution of these technologies, their adoption is further estimated to increase. Various smartphone apps offer medical AI consultations based on personal medical history and common medical knowledge. These apps help identify a patient's lifestyle, mental health, and other biomedical parameters to improve their health. Moreover, these apps enhance the efficiency of diagnosing patients while sparing the patient long waiting hours in a doctor's clinic.

"North America to hold for majority of share among AI in Healthcare market during the forecast period"

Improvements in cloud computing platforms, which are now more efficient, affordable, and capable of processing complex information, have led to the growth of inexpensive software development tools and vast data sets that play a vital role in the development of AI technology. The US recorded the highest healthcare expenditure of 18.1% of the total gross domestic product (GDP) in 2020. The healthcare spending of the country has doubled in the last three decades. This, in turn, is creating a conducive environment for market growth.

In the process of determining and verifying the market size for several segments and subsegments gathered through secondary research, extensive primary interviews have been conducted with key industry experts in the AI in Healthcare market space. The break-up of primary participants for the report has been shown below:

- By Company Type: Tier 1 - 40%, Tier 2 - 25%, and Tier 35%
- By Designation: C-level Executives - 40%, Directors - 35%, and Others - 25%
- By Region: North America -45%, APAC- 30%, Europe - 20%, and RoW - 5%

The report profiles key players in the AI in Healthcare market with their respective market ranking analysis. Prominent players profiled in this report are Intel Corporation (US), Koninklijke Philips N.V., (Netherlands), Microsoft (US), Siemens Healthineers (Germany), and NVIDIA Corporation (US) among others.

?

Research Coverage:

This research report categorizes the AI in Healthcare market on the basis of offerings, technology, application, end user, and geography. The report describes the major drivers, restraints, challenges, and opportunities pertaining to the AI in Healthcare market and forecasts the same till 2028. Apart from these, the report also consists of leadership mapping and analysis of all the companies included in the AI in Healthcare ecosystem.

Key Benefits of Buying the Report

The report will help market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall AI in Healthcare market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

**Table of Contents:**

1□INTRODUCTION□36

1.1□STUDY OBJECTIVES□36

1.2	MARKET DEFINITION	37
1.2.1	INCLUSIONS AND EXCLUSIONS	37
1.3	STUDY SCOPE	38
1.3.1	MARKETS COVERED	38
1.3.2	GEOGRAPHIC SCOPE	38
1.3.3	YEARS CONSIDERED	39
1.4	CURRENCY CONSIDERED	39
1.5	UNITS CONSIDERED	39
1.6	LIMITATIONS	40
1.7	STAKEHOLDERS	40
1.8	SUMMARY OF CHANGES	41
2	RESEARCH METHODOLOGY	42
2.1	RESEARCH DATA	42
FIGURE 1	AI IN HEALTHCARE MARKET: RESEARCH DESIGN	43
2.2	SECONDARY AND PRIMARY RESEARCH	44
FIGURE 2	AI IN HEALTHCARE MARKET: RESEARCH APPROACH	44
2.2.1	SECONDARY DATA	45
2.2.1.1	List of major secondary sources	45
2.2.1.2	Key data from secondary sources	46
2.2.2	PRIMARY DATA	46
2.2.2.1	Primary interviews with experts	47
2.2.2.2	Key data from primary sources	47
2.2.2.3	Key industry insights	48
2.2.2.4	Breakdown of primaries	48
2.3	MARKET SIZE ESTIMATION	48
2.3.1	BOTTOM-UP APPROACH	49
2.3.1.1	Estimating market size by bottom-up approach (demand side)	49
FIGURE 3	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH	49
FIGURE 4	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP (SUPPLY SIDE) -ILLUSTRATION OF REVENUE ESTIMATION OF COMPANIES FROM SALES OF AI IN HEALTHCARE OFFERING	50
FIGURE 5	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP (DEMAND SIDE) -ESTIMATION OF SIZE OF AI IN HEALTHCARE MARKET, BY END USER	51
2.3.2	TOP-DOWN APPROACH	51
2.3.2.1	Estimating market size by top-down approach (supply side)	52
FIGURE 6	MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH	52
FIGURE 7	MARKET SIZE ESTIMATION METHODOLOGY: (SUPPLY SIDE)-REVENUE GENERATED FROM AI IN HEALTHCARE OFFERINGS	53
2.4	MARKET BREAKDOWN AND DATA TRIANGULATION	54
FIGURE 8	DATA TRIANGULATION	54
2.5	RESEARCH ASSUMPTIONS	55
FIGURE 9	ASSUMPTIONS FOR RESEARCH STUDY	55
2.6	IMPACT OF RECESSION	55
2.7	RISK ASSESSMENT	56
TABLE 1	LIMITATIONS AND ASSOCIATED RISKS	56
2.8	LIMITATIONS	56
3	EXECUTIVE SUMMARY	57
3.1	AI IN HEALTHCARE MARKET: RECESSION IMPACT	57
FIGURE 10	RECESSION IMPACT: GDP GROWTH PROJECTION TILL 2023 FOR MAJOR ECONOMIES	57

FIGURE 11 RECESSION IMPACT ON AI IN HEALTHCARE MARKET, 2019-2028 (USD MILLION) 58

FIGURE 12 SOFTWARE SEGMENT TO HOLD SECOND-LARGEST SHARE OF AI IN HEALTHCARE MARKET FROM 2023 TO 2028 59

FIGURE 13 MACHINE LEARNING SEGMENT TO HOLD LARGEST SHARE OF AI IN HEALTHCARE MARKET FROM 2023 TO 2028 59

FIGURE 14 PATIENTS SEGMENT TO REGISTER HIGHEST CAGR AI IN HEALTHCARE MARKET DURING FORECAST PERIOD 60

FIGURE 15 MEDICAL IMAGING & DIAGNOSTICS APPLICATION TO GROW AT HIGHEST CAGR AI IN HEALTHCARE MARKET DURING FORECAST PERIOD 61

FIGURE 16 NORTH AMERICA ACCOUNTED FOR LARGEST SHARE OF AI IN HEALTHCARE MARKET IN 2022 62

4 PREMIUM INSIGHTS 63

4.1 ATTRACTIVE GROWTH OPPORTUNITIES FOR AI IN HEALTHCARE MARKET 63

FIGURE 17 INCREASING ADOPTION OF AI-BASED TOOLS IN HEALTHCARE FACILITIES TO DRIVE MARKET GROWTH DURING 2023-2028 63

4.2 AI IN HEALTHCARE MARKET, BY OFFERING 63

FIGURE 18 SOFTWARE TO ACCOUNT FOR LARGEST SHARE OF AI IN HEALTHCARE MARKET FROM 2023 TO 2028 63

4.3 AI IN HEALTHCARE MARKET, BY TECHNOLOGY 64

FIGURE 19 MACHINE LEARNING TECHNOLOGY TO BE LARGEST SHAREHOLDER OF AI IN HEALTHCARE MARKET FROM 2023 TO 2028 64

4.4 AI IN HEALTHCARE MARKET, BY APPLICATION 64

FIGURE 20 MEDICAL IMAGING & DIAGNOSTICS SEGMENT TO REGISTER HIGHEST CAGR DURING 2023-2028 64

4.5 AI IN HEALTHCARE MARKET, BY END USER 65

FIGURE 21 HOSPITALS & HEALTHCARE PROVIDERS TO BE LARGEST SHAREHOLDERS OF AI IN HEALTHCARE MARKET IN 2023 TO 2028 65

?

4.6 AI IN HEALTHCARE MARKET, BY COUNTRY 65

FIGURE 22 AI IN HEALTHCARE MARKET IN CHINA AND MEXICO TO GROW AT HIGHEST CAGR FROM 2023 TO 2028 65

5 MARKET OVERVIEW 66

5.1 INTRODUCTION 66

5.2 MARKET DYNAMICS 67

FIGURE 23 AI IN HEALTHCARE MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES 67

5.2.1 DRIVERS 68

FIGURE 24 ANALYSIS OF IMPACT OF DRIVERS ON AI IN HEALTHCARE MARKET 68

5.2.1.1 Generation of large and complex healthcare datasets 68

5.2.1.2 Pressing need to reduce healthcare costs 69

5.2.1.3 Improving computing power and declining hardware cost 70

5.2.1.4 Rising number of partnerships and collaborations among different domains in healthcare sector 70

5.2.1.5 Growing need for improvised healthcare services due to imbalance between healthcare workforce and patients 72

5.2.2 RESTRAINTS 72

FIGURE 25 ANALYSIS OF IMPACT OF RESTRAINTS ON AI IN HEALTHCARE MARKET 72

5.2.2.1 Reluctance among medical practitioners to adopt AI-based technologies 73

5.2.2.2 Lack of skilled AI workforce and ambiguous regulatory guidelines for medical software 73

5.2.3 OPPORTUNITIES 74

FIGURE 26 ANALYSIS OF IMPACT OF OPPORTUNITIES ON AI IN HEALTHCARE MARKET 74

5.2.3.1 Growing potential of AI-based tools for elderly care 74

5.2.3.2 Increasing focus on developing human-aware AI systems 75

5.2.3.3 Rising potential of AI technology in genomics, drug discovery, and imaging & diagnostics 75

5.2.4 CHALLENGES 76

FIGURE 27 ANALYSIS OF IMPACT OF CHALLENGES ON AI IN HEALTHCARE MARKET 76

5.2.4.1 Lack of curated healthcare data 76

#### 5.2.4.2 Concerns regarding data privacy 77

FIGURE 28 HEALTHCARE BREACHES REPORTED TO US DEPARTMENT OF HEALTH AND HUMAN SERVICES, 2019 TO 2021 77

#### 5.2.4.3 Lack of interoperability between AI solutions offered by different vendors 77

FIGURE 29 CHALLENGES OF HEALTHCARE DATA INTEROPERABILITY 78

#### 5.3 VALUE CHAIN ANALYSIS 78

FIGURE 30 AI IN HEALTHCARE MARKET VALUE CHAIN 78

#### 5.4 PORTER'S FIVE FORCES ANALYSIS 79

TABLE 2 AI IN HEALTHCARE MARKET: PORTER'S FIVE FORCES ANALYSIS 79

?

#### 5.5 ECOSYSTEM ANALYSIS 81

FIGURE 31 ECOSYSTEM OF AI IN HEALTHCARE 81

TABLE 3 ECOSYSTEM: AI IN HEALTHCARE MARKET 82

#### 5.6 REVENUE SHIFTS AND NEW REVENUE POCKETS FOR AI IN HEALTHCARE MARKET 83

FIGURE 32 TRENDS/DISRUPTION IMPACTING CUSTOMER BUSINESS 83

#### 5.7 CASE STUDY ANALYSIS 84

5.7.1 USE CASE - BIOBEAT (ISRAEL) 84

5.7.2 USE CASE - CLEVELAND CLINIC AND MICROSOFT 84

5.7.3 USE CASE - TRANSLATIONAL GENOMICS RESEARCH INSTITUTE (TGEN) 85

#### 5.8 TECHNOLOGY ANALYSIS 85

5.8.1 CLOUD COMPUTING 85

5.8.2 CLOUD GPU 85

#### 5.9 PRICING ANALYSIS 86

FIGURE 33 AVERAGE SELLING PRICE OF PROCESSOR COMPONENTS IN AI IN HEALTHCARE MARKET, 2019-2028 (USD) 86

5.9.1 AVERAGE SELLING PRICE (ASP) ANALYSIS OF COMPONENTS OFFERED BY KEY PLAYERS 86

FIGURE 34 AVERAGE SELLING PRICE OF PROCESSOR COMPONENTS OFFERED BY KEY COMPANIES 87

TABLE 4 ASP RANGE OF PROCESSOR COMPONENTS, 2019-2028 87

TABLE 5 ASP RANGE OF SERVER SOFTWARE 87

5.9.2 ASP TRENDS 88

#### 5.10 TRADE ANALYSIS 88

FIGURE 35 EXPORT DATA FOR HS CODE 854231 FOR TOP COUNTRIES IN AI IN HEALTHCARE MARKET, 2017-2021 (USD THOUSAND) 89

FIGURE 36 IMPORT DATA FOR HS CODE 854231 FOR TOP COUNTRIES IN AI IN HEALTHCARE MARKET, 2017-2021 (USD THOUSAND) 89

#### 5.11 PATENT ANALYSIS 90

FIGURE 37 COMPANIES WITH HIGHEST NUMBER OF PATENT APPLICATIONS IN LAST 10 YEARS 90

TABLE 6 TOP 20 PATENT OWNERS IN LAST 10 YEARS 90

FIGURE 38 NUMBER OF PATENTS GRANTED PER YEAR, 2012-2021 91

5.11.1 MAJOR PATENTS 92

TABLE 7 MAJOR PATENTS IN AI IN HEALTHCARE MARKET 92

#### 5.12 REGULATORY LANDSCAPE 94

TABLE 8 TARIFF FOR ELECTRONIC INTEGRATED CIRCUITS AS PROCESSORS AND CONTROLLERS EXPORTED BY US, 2022 94

TABLE 9 TARIFF FOR ELECTRONIC INTEGRATED CIRCUITS AS PROCESSORS AND CONTROLLERS EXPORTED BY CHINA, 2022 94

TABLE 10 TARIFF FOR ELECTRONIC INTEGRATED CIRCUITS AS PROCESSORS AND CONTROLLERS EXPORTED BY GERMANY, 2020 94

#### 5.12.1 REGULATIONS 95

5.12.1.1 Export-import regulations 95

5.12.1.2 Restriction of Hazardous Substances (ROHS) and Waste Electrical and Electronic Equipment (WEEE) 96

5.12.1.3 Registration, Evaluation, Authorisation and Restriction of Chemicals (REACH) 96

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.12.1.4	General Data Protection Regulation (GDPR)	97
6	ARTIFICIAL INTELLIGENCE IN HEALTHCARE MARKET, BY OFFERING	98
6.1	INTRODUCTION	99
FIGURE 39	AI IN HEALTHCARE MARKET, BY OFFERING	99
FIGURE 40	SOFTWARE TO HOLD LARGEST SHARE OF AI IN HEALTHCARE MARKET DURING FORECAST PERIOD	100
TABLE 11	AI IN HEALTHCARE MARKET, BY OFFERING, 2019-2022 (USD MILLION)	100
TABLE 12	AI IN HEALTHCARE MARKET, BY OFFERING, 2023-2028 (USD MILLION)	100
6.2	HARDWARE	101
TABLE 13	HARDWARE: AI IN HEALTHCARE MARKET, BY TYPE, 2019-2022 (USD MILLION)	101
TABLE 14	HARDWARE: AI IN HEALTHCARE MARKET, BY TYPE, 2023-2028 (USD MILLION)	101
TABLE 15	HARDWARE: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	101
TABLE 16	HARDWARE: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION)	102
6.2.1	PROCESSOR	102
6.2.1.1	Intel Corporation (US), NVIDIA Corporation (US), AND Xilinx (US) key providers of hardware components for AI applications	102
TABLE 17	PROCESSOR: AI IN HEALTHCARE MARKET, BY TYPE, 2019-2022 (MILLION UNITS)	102
TABLE 18	PROCESSOR: AI IN HEALTHCARE MARKET, BY TYPE, 2023-2028 (MILLION UNITS)	103
TABLE 19	PROCESSOR: AI IN HEALTHCARE MARKET, BY TYPE, 2019-2022 (USD MILLION)	103
TABLE 20	PROCESSOR: AI IN HEALTHCARE MARKET, BY TYPE, 2023-2028 (USD MILLION)	103
6.2.1.2	MPU/CPU	104
TABLE 21	CASE STUDY: DYNALIFE'S AND ALTAML'S COLON POLYP PROJECT	104
6.2.1.3	GPU	104
TABLE 22	CASE STUDY: UNIVERSITY OF SYDNEY, BRAIN AND MIND CENTER (SNAC) AND NVIDIA CORPORATION	105
6.2.1.4	FPGA	105
TABLE 23	FPGA: RECENT DEVELOPMENT	106
6.2.1.5	GPU	106
TABLE 24	CASE STUDY: XILINX AND SPLINE. AI	106
6.2.1.6	ASIC	107
6.2.1.7	GPU	107
TABLE 25	CASE STUDY: LONDON MEDICAL IMAGING & AI CENTRE & RUN:AI	107
?		
6.2.2	MEMORY	107
6.2.2.1	Development of high-bandwidth memory for AI applications to drive market	107
TABLE 26	MEMORY: RECENT DEVELOPMENT	108
TABLE 27	CASE STUDY: INTEL, DELL, AND UNIVERSITY OF FLORIDA	109
6.2.3	NETWORK	109
6.2.3.1	NVIDIA Corporation (US) and Intel Corporation (US) among key providers of network interconnect adapters for AI applications	109
TABLE 28	NETWORK: AI IN HEALTHCARE MARKET, BY TYPE, 2019-2022 (MILLION UNITS)	109
TABLE 29	NETWORK: AI IN HEALTHCARE MARKET, BY TYPE, 2023-2028 (MILLION UNITS)	110
TABLE 30	NETWORK: AI IN HEALTHCARE MARKET, BY TYPE, 2019-2022 (USD MILLION)	110
TABLE 31	NETWORK: AI IN HEALTHCARE MARKET, BY TYPE, 2023-2028 (USD MILLION)	110
6.3	SOFTWARE	110
TABLE 32	SOFTWARE: AI IN HEALTHCARE MARKET, BY TYPE, 2019-2022 (USD MILLION)	111
TABLE 33	SOFTWARE: AI IN HEALTHCARE MARKET, BY TYPE, 2023-2028 (USD MILLION)	111
TABLE 34	SOFTWARE: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	111
TABLE 35	SOFTWARE: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION)	111

### 6.3.1 AI SOLUTION 112

#### 6.3.1.1 Integration of non-procedural languages in AI solutions to propel segmental growth 112

##### TABLE 36 CASE STUDY: PHILIPS AND AWS 112

##### TABLE 37 SOFTWARE: AI IN HEALTHCARE MARKET FOR AI SOLUTIONS, BY DEPLOYMENT TYPE, 2019-2022 (USD MILLION) 112

##### TABLE 38 SOFTWARE: AI IN HEALTHCARE MARKET FOR AI SOLUTIONS, BY DEPLOYMENT TYPE, 2023-2028 (USD MILLION) 113

#### 6.3.1.2 On-premises 113

##### TABLE 39 ON-PREMISES: RECENT DEVELOPMENT 113

#### 6.3.1.3 Cloud 114

### 6.3.2 AI PLATFORM 114

#### 6.3.2.1 Increasing use of AI platforms for decision-making and data management to boost segmental growth 114

##### TABLE 40 SOFTWARE: AI IN HEALTHCARE MARKET FOR AI PLATFORMS, BY TYPE, 2019-2022 (USD MILLION) 115

##### TABLE 41 SOFTWARE: AI IN HEALTHCARE MARKET FOR AI PLATFORMS, BY TYPE, 2023-2028 (USD MILLION) 115

#### 6.3.2.2 Machine learning framework 115

#### 6.3.2.3 Application program interface 115

?

### 6.4 SERVICES 116

##### TABLE 42 SERVICES: AI IN HEALTHCARE MARKET, BY TYPE, 2019-2022 (USD MILLION) 116

##### TABLE 43 SERVICES: AI IN HEALTHCARE MARKET, BY TYPE, 2023-2028 (USD MILLION) 116

##### TABLE 44 SERVICES: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 116

##### TABLE 45 SERVICES: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 117

#### 6.4.1 DEPLOYMENT & INTEGRATION 117

##### 6.4.1.1 Key services for configuring AI systems in healthcare 117

##### 6.4.2 SUPPORT & MAINTENANCE 117

##### 6.4.2.1 Help to keep up performance of systems post installation 117

### 7 ARTIFICIAL INTELLIGENCE IN HEALTHCARE MARKET, BY TECHNOLOGY 118

#### 7.1 INTRODUCTION 119

##### FIGURE 41 AI IN HEALTHCARE MARKET, BY TECHNOLOGY 119

##### FIGURE 42 MACHINE LEARNING TECHNOLOGY TO HOLD LARGEST SHARE OF AI IN HEALTHCARE MARKET DURING FORECAST PERIOD 120

##### TABLE 46 AI IN HEALTHCARE MARKET, BY TECHNOLOGY, 2019-2022 (USD MILLION) 120

##### TABLE 47 AI IN HEALTHCARE MARKET, BY TECHNOLOGY, 2023-2028 (USD MILLION) 120

#### 7.2 MACHINE LEARNING 121

##### TABLE 48 CASE STUDY: THE HEALTH MANAGEMENT ACADEMY (THE ACADEMY) AND NUANCE 121

##### TABLE 49 CAST STUDY: MAYO CLINIC AND GOOGLE INC 121

##### TABLE 50 MACHINE LEARNING: AI IN HEALTHCARE MARKET, BY TYPE, 2019-2022 (USD MILLION) 122

##### TABLE 51 MACHINE LEARNING: AI IN HEALTHCARE MARKET, BY TYPE, 2023-2028 (USD MILLION) 122

#### 7.2.1 DEEP LEARNING 122

##### 7.2.1.1 Enables machines to build hierarchical representations 122

##### TABLE 52 CASE STUDY: SUBTLE MEDICAL AND BAYER 123

#### 7.2.2 SUPERVISED LEARNING 124

##### 7.2.2.1 Classification and regression major segments of supervised learning 124

#### 7.2.3 REINFORCEMENT LEARNING 124

##### 7.2.3.1 Allows systems and software to determine ideal behavior for maximizing performance of systems 124

#### 7.2.4 UNSUPERVISED LEARNING 124

##### 7.2.4.1 Includes clustering methods consisting of algorithms with unlabeled training data 124

#### 7.2.5 OTHERS 124

### 7.3 NATURAL LANGUAGE PROCESSING 125

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

7.3.1	WIDELY USED BY CLINICAL AND RESEARCH COMMUNITIES IN HEALTHCARE	125
TABLE 53	CASE STUDY: ROCHE AND JOHN SNOW LABS	125
TABLE 54	NATURAL LANGUAGE PROCESSING: AI IN HEALTHCARE MARKET, BY TYPE, 2019-2022 (USD MILLION)	126
TABLE 55	NATURAL LANGUAGE PROCESSING: AI IN HEALTHCARE MARKET, BY TYPE, 2023-2028 (USD MILLION)	126
7.4	CONTEXT-AWARE COMPUTING	126
7.4.1	DEVELOPMENT OF MORE SOPHISTICATED HARD AND SOFT SENSORS TO ACCELERATE GROWTH OF CONTEXT-AWARE COMPUTING	126
TABLE 56	CONTEXT-AWARE COMPUTING: RECENT DEVELOPMENT	127
TABLE 57	CONTEXT-AWARE COMPUTING: AI IN HEALTHCARE MARKET, BY TYPE, 2019-2022 (USD MILLION)	127
TABLE 58	CONTEXT-AWARE COMPUTING: AI IN HEALTHCARE MARKET, BY TYPE, 2023-2028 (USD MILLION)	127
7.5	COMPUTER VISION	128
7.5.1	USED FOR SIGNIFICANT APPLICATIONS IN SURGERY AND THERAPY	128
8	ARTIFICIAL INTELLIGENCE IN HEALTHCARE MARKET, BY APPLICATION	129
8.1	INTRODUCTION	130
FIGURE 43	AI IN HEALTHCARE MARKET, BY APPLICATION	130
FIGURE 44	MEDICAL IMAGING & DIAGNOSTICS TO ACCOUNT FOR LARGEST SHARE OF AI IN HEALTHCARE MARKET IN 2028	131
TABLE 59	AI IN HEALTHCARE MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	132
TABLE 60	AI IN HEALTHCARE MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	132
8.2	PATIENT DATA & RISK ANALYSIS	133
8.2.1	PROVIDE PREDICTIVE INSIGHTS INTO PATIENT HEALTH USING MACHINE LEARNING AND NATURAL LANGUAGE PROCESSING ALGORITHMS	133
TABLE 61	CASE STUDY: CLEVELAND CLINIC AND MICROSOFT	134
TABLE 62	PATIENT DATA & RISK ANALYSIS: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	134
TABLE 63	PATIENT DATA & RISK ANALYSIS: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION)	134
TABLE 64	PATIENT DATA & RISK ANALYSIS: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION)	135
TABLE 65	PATIENT DATA & RISK ANALYSIS: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION)	135
8.3	IN-PATIENT CARE & HOSPITAL MANAGEMENT	135
8.3.1	HELP TO CUT DOWN EXCESSIVE OPERATIONAL COSTS AND LOWER COST OF PATIENT CARE	135
TABLE 66	CASE STUDY: TIDALHEALTH AND REGARDS	136
TABLE 67	IN-PATIENT CARE & HOSPITAL MANAGEMENT: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	136
TABLE 68	IN-PATIENT CARE & HOSPITAL MANAGEMENT: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION)	136
TABLE 69	IN-PATIENT CARE & HOSPITAL MANAGEMENT: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION)	137
TABLE 70	IN-PATIENT CARE & HOSPITAL MANAGEMENT: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION)	137
8.4	MEDICAL IMAGING & DIAGNOSTICS	137
8.4.1	HELP TO GENERATE HIGHLY ACCURATE IMAGING DATA	137
TABLE 71	MEDICAL IMAGING DIAGNOSIS: RECENT DEVELOPMENT	138
TABLE 72	MEDICAL IMAGING & DIAGNOSTICS: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	138
TABLE 73	MEDICAL IMAGING & DIAGNOSTICS: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION)	139
TABLE 74	MEDICAL IMAGING & DIAGNOSTICS: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION)	139
TABLE 75	MEDICAL IMAGING & DIAGNOSTICS: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION)	139
8.5	LIFESTYLE MANAGEMENT & REMOTE PATIENT MONITORING	140
8.5.1	HELP REDUCE BURDEN ON HOSPITALS	140
TABLE 76	LIFESTYLE MANAGEMENT & REMOTE PATIENT MONITORING: RECENT DEVELOPMENT	140
TABLE 77	LIFESTYLE MANAGEMENT & REMOTE PATIENT MONITORING: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	140
TABLE 78	LIFESTYLE MANAGEMENT & REMOTE PATIENT MONITORING: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD	



MILLION) 141

TABLE 79 LIFESTYLE MANAGEMENT & REMOTE PATIENT MONITORING: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 141

TABLE 80 LIFESTYLE MANAGEMENT & REMOTE PATIENT MONITORING: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 141

8.6 VIRTUAL ASSISTANTS 141

8.6.1 ASSIST IN DISSEMINATING PRECISE MEDICAL INFORMATION AMONG VULNERABLE POPULATIONS 141

TABLE 81 VIRTUAL ASSISTANT: RECENT DEVELOPMENT 142

TABLE 82 CASE STUDY: GOVERNMENT OF INDIA, ACCENTURE, AND MICROSOFT 142

TABLE 83 VIRTUAL ASSISTANT: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 143

TABLE 84 VIRTUAL ASSISTANT: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 143

TABLE 85 VIRTUAL ASSISTANT: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 143

TABLE 86 VIRTUAL ASSISTANT: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 144

8.7 DRUG DISCOVERY 144

8.7.1 AI EXPECTED TO REDUCE TIME AND COST INVOLVED IN DRUG DISCOVERY 144

TABLE 87 DRUG DISCOVERY: RECENT DEVELOPMENT 145

TABLE 88 DRUG DISCOVERY: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 145

TABLE 89 DRUG DISCOVERY: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 146

TABLE 90 DRUG DISCOVERY: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 146

TABLE 91 DRUG DISCOVERY: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 146

8.8 RESEARCH 147

8.8.1 AI ALGORITHMS USED BY BIOINFORMATICS RESEARCHERS FOR DATABASE CLASSIFICATION AND MINING 147

TABLE 92 RESEARCH: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 147

TABLE 93 RESEARCH: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 148

TABLE 94 RESEARCH: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 148

TABLE 95 RESEARCH: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 148

8.9 HEALTHCARE ASSISTANCE ROBOTS 148

8.9.1 HELP TO SIGNIFICANTLY REDUCE NEED FOR ROUND-THE-CLOCK MANUAL NURSING CARE 148

TABLE 96 HEALTHCARE ASSISTANCE ROBOTS: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 149

TABLE 97 HEALTHCARE ASSISTANCE ROBOTS: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 149

TABLE 98 HEALTHCARE ASSISTANCE ROBOTS: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 149

TABLE 99 HEALTHCARE ASSISTANCE ROBOTS: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 150

8.10 PRECISION MEDICINE 150

8.10.1 AI EXPECTED TO FULFIL DEMAND FOR PERSONALIZED TREATMENT PLANS FOR PATIENTS ADMINISTERED WITH PRECISION MEDICINE 150

TABLE 100 PRECISION MEDICINE: RECENT DEVELOPMENT 150

TABLE 101 PRECISION MEDICINE: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 151

TABLE 102 PRECISION MEDICINE: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 151

TABLE 103 PRECISION MEDICINE: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 151

TABLE 104 PRECISION MEDICINE: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 152

8.11 EMERGENCY ROOM & SURGERY 152

8.11.1 LIMITED AVAILABILITY OF SKILLED WORKFORCE IN EMERGENCY ROOMS TO DRIVE ADOPTION OF AI 152

TABLE 105 EMERGENCY ROOM & SURGERY: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 153

TABLE 106 EMERGENCY ROOM & SURGERY: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 153

TABLE 107 EMERGENCY ROOM & SURGERY: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 153

TABLE 108 EMERGENCY ROOM & SURGERY: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 153

?

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## 8.12 WEARABLES 154

### 8.12.1 FACILITATE IMPROVED, REAL-TIME PATIENT MONITORING 154

TABLE 109 CASE STUDY: KENSCI, MICROSOFT, AND FEDERAL GOVERNMENT 154

TABLE 110 WEARABLES: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 154

TABLE 111 WEARABLES: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 155

TABLE 112 WEARABLES: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 155

TABLE 113 WEARABLES: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 155

## 8.13 MENTAL HEALTH 155

### 8.13.1 AI USED IN DIAGNOSIS OF MENTAL DISTRESS AND NEUROLOGICAL ABNORMALITIES 155

TABLE 114 MENTAL HEALTH: RECENT DEVELOPMENT 156

TABLE 115 MENTAL HEALTH: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 156

TABLE 116 MENTAL HEALTH: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 156

TABLE 117 MENTAL HEALTH: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 157

TABLE 118 MENTAL HEALTH: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 157

## 8.14 CYBERSECURITY 157

### 8.14.1 AI IN HEALTHCARE CYBERSECURITY TO BECOME CRITICAL IN PROTECTION OF ONSITE SYSTEMS 157

TABLE 119 CYBERSECURITY: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 158

TABLE 120 CYBERSECURITY: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 158

TABLE 121 CYBERSECURITY: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 158

TABLE 122 CYBERSECURITY: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 159

## 9 ARTIFICIAL INTELLIGENCE IN HEALTHCARE MARKET, BY END USER 160

### 9.1 INTRODUCTION 161

FIGURE 45 AI IN HEALTHCARE MARKET, BY END USER 161

FIGURE 46 HOSPITALS & HEALTHCARE PROVIDERS TO HOLD LARGEST MARKET SHARE DURING FORECAST PERIOD 162

TABLE 123 AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION) 162

TABLE 124 AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION) 162

### 9.2 HOSPITALS AND HEALTHCARE PROVIDERS 163

#### 9.2.1 UTILIZE AI TO PREDICT AND PREVENT READMISSIONS AND IMPROVE OPERATIONS 163

TABLE 125 HOSPITALS & HEALTHCARE PROVIDERS: RECENT DEVELOPMENT 164

TABLE 126 HOSPITALS & HEALTHCARE PROVIDERS: AI IN HEALTHCARE MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 165

TABLE 127 HOSPITALS & HEALTHCARE PROVIDERS: AI IN HEALTHCARE MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 165

TABLE 128 HOSPITALS & HEALTHCARE PROVIDERS: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 166

TABLE 129 HOSPITALS & HEALTHCARE PROVIDERS: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 166

### 9.3 PATIENTS 166

#### 9.3.1 INCREASING POPULARITY OF SMARTPHONE APPLICATIONS AND WEARABLES TO DRIVE ADOPTION OF AI AMONG PATIENTS 166

TABLE 130 PATIENTS: RECENT DEVELOPMENT 167

TABLE 131 PATIENTS: AI IN HEALTHCARE MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 167

TABLE 132 PATIENTS: AI IN HEALTHCARE MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 167

TABLE 133 PATIENTS: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION) 168

TABLE 134 PATIENTS: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION) 168

### 9.4 PHARMACEUTICALS & BIOTECHNOLOGY COMPANIES 168

#### 9.4.1 USE AI FOR DRUG DISCOVERY, PRECISION MEDICINE, AND RESEARCH APPLICATIONS 168

TABLE 135 PHARMACEUTICALS & BIOTECHNOLOGY COMPANIES: RECENT DEVELOPMENT 169

TABLE 136 PHARMACEUTICALS & BIOTECHNOLOGY COMPANIES: AI IN HEALTHCARE MARKET, BY APPLICATION, 2019-2022 (USD MILLION) 169

TABLE 137 PHARMACEUTICALS & BIOTECHNOLOGY COMPANIES: AI IN HEALTHCARE MARKET, BY APPLICATION, 2023-2028 (USD MILLION) 170

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 138	PHARMACEUTICALS & BIOTECHNOLOGY COMPANIES: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	170
TABLE 139	PHARMACEUTICALS & BIOTECHNOLOGY COMPANIES: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION)	170
9.5	HEALTHCARE PAYERS	171
9.5.1	USE AI TOOLS TO MANAGE RISKS, IDENTIFY CLAIM TRENDS, AND MAXIMIZE PAYMENT ACCURACY	171
TABLE 140	HEALTHCARE PAYERS: RECENT DEVELOPMENT	172
TABLE 141	HEALTHCARE PAYERS: AI IN HEALTHCARE MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	172
TABLE 142	HEALTHCARE PAYERS: AI IN HEALTHCARE MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	172
TABLE 143	HEALTHCARE PAYERS: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	173
TABLE 144	HEALTHCARE PAYERS: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION)	173
?		
9.6	OTHERS	173
TABLE 145	OTHERS: AI IN HEALTHCARE MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	174
TABLE 146	OTHERS: AI IN HEALTHCARE MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	174
TABLE 147	OTHERS: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	174
TABLE 148	OTHERS: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION)	175
10	ARTIFICIAL INTELLIGENCE IN HEALTHCARE MARKET, BY REGION	176
10.1	INTRODUCTION	177
FIGURE 47	CHINA AND MEXICO TO EMERGE AS NEW HOTSPOTS FOR AI IN HEALTHCARE MARKET	177
FIGURE 48	ASIA PACIFIC TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD	178
TABLE 149	AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	178
TABLE 150	AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION)	178
10.2	NORTH AMERICA	179
FIGURE 49	NORTH AMERICA: AI IN HEALTHCARE MARKET SNAPSHOT	180
FIGURE 50	US TO DOMINATE AI IN HEALTHCARE MARKET IN NORTH AMERICA IN 2028	180
TABLE 151	NORTH AMERICA: AI IN HEALTHCARE MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	181
TABLE 152	NORTH AMERICA: AI IN HEALTHCARE MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	181
TABLE 153	NORTH AMERICA: AI IN HEALTHCARE MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	181
TABLE 154	NORTH AMERICA: AI IN HEALTHCARE MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	182
10.2.1	US	182
10.2.1.1	High healthcare spending combined with increasing demand for AI in medical sector to complement market growth	182
TABLE 155	US: RECENT DEVELOPMENT	183
10.2.2	CANADA	184
10.2.2.1	Continuous research on NLP and ML across research institutions and universities in Canada to propel market	184
TABLE 156	CANADA: RECENT DEVELOPMENT	184
10.2.3	MEXICO	185
10.2.3.1	Mexico to account for smallest share of AI in healthcare market in North America during forecast period	185
TABLE 157	MEXICO: RECENT DEVELOPMENT	185
10.3	EUROPE	185
FIGURE 51	EUROPE: AI IN HEALTHCARE MARKET SNAPSHOT	186
FIGURE 52	REST OF EUROPE TO EXHIBIT HIGHEST CAGR IN EUROPEAN AI IN HEALTHCARE MARKET IN 2028	187
TABLE 158	EUROPE: AI IN HEALTHCARE MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	187
TABLE 159	EUROPE: AI IN HEALTHCARE MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	188
TABLE 160	EUROPE: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION)	188
TABLE 161	EUROPE: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION)	188
TABLE 162	EUROPE: AI IN HEALTHCARE MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	189

TABLE 163	EUROPE: AI IN HEALTHCARE MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	189
10.3.1	GERMANY	190
10.3.1.1	Government initiatives to expedite AI development to support market growth	190
TABLE 164	GERMANY: RECENT DEVELOPMENT	190
10.3.2	UK	191
10.3.2.1	Adoption of AI in drug discovery space to fuel market growth	191
TABLE 165	UK: RECENT DEVELOPMENT	191
10.3.3	FRANCE	192
10.3.3.1	Government endeavors to develop healthcare IT in France likely to support market	192
TABLE 166	FRANCE: RECENT DEVELOPMENT	192
10.3.4	ITALY	193
10.3.4.1	Development of electronic health records and aging population to drive market	193
TABLE 167	ITALY: RECENT DEVELOPMENT	193
10.3.5	SPAIN	194
10.3.5.1	Growing awareness of AI in Spain to favor market growth	194
TABLE 168	SPAIN: RECENT DEVELOPMENT	194
10.3.6	REST OF EUROPE	194
10.4	ASIA PACIFIC	195
FIGURE 53	ASIA PACIFIC: AI IN HEALTHCARE MARKET SNAPSHOT	196
FIGURE 54	CHINA TO EXHIBIT HIGHEST CAGR IN AI IN HEALTHCARE MARKET ASIA PACIFIC IN 2028	197
TABLE 169	ASIA PACIFIC: AI IN HEALTHCARE MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	197
TABLE 170	ASIA PACIFIC: AI IN HEALTHCARE MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	197
TABLE 171	ASIA PACIFIC: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION)	198
TABLE 172	ASIA PACIFIC: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION)	198
TABLE 173	ASIA PACIFIC: AI IN HEALTHCARE MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	199
TABLE 174	ASIA PACIFIC: AI IN HEALTHCARE MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	199
?		
10.4.1	CHINA	200
10.4.1.1	Concrete government measures to accelerate AI development to augment market growth	200
TABLE 175	CHINA: RECENT DEVELOPMENT	200
10.4.2	JAPAN	201
10.4.2.1	AI adoption to expedite drug discovery to motivate market growth	201
10.4.3	SOUTH KOREA	202
10.4.3.1	Government's AI National Strategy to push market growth in South Korea	202
TABLE 176	SOUTH KOREA: RECENT DEVELOPMENT	202
10.4.4	INDIA	203
10.4.4.1	Developing IT infrastructure and AI-friendly government initiatives to spur market growth	203
TABLE 177	INDIA: RECENT DEVELOPMENT	203
10.4.5	REST OF ASIA PACIFIC	204
TABLE 178	REST OF ASIA PACIFIC: RECENT DEVELOPMENT	204
10.5	REST OF THE WORLD	205
FIGURE 55	REST OF THE WORLD: SNAPSHOT OF AI IN HEALTHCARE MARKET	205
FIGURE 56	SOUTH AMERICA TO DOMINATE MARKET IN ROW IN 2028	206
TABLE 179	REST OF THE WORLD: AI IN HEALTHCARE MARKET, BY REGION, 2019-2022 (USD MILLION)	206
TABLE 180	REST OF THE WORLD: AI IN HEALTHCARE MARKET, BY REGION, 2023-2028 (USD MILLION)	206
TABLE 181	REST OF THE WORLD: AI IN HEALTHCARE MARKET, BY END USER, 2019-2022 (USD MILLION)	207
TABLE 182	REST OF THE WORLD: AI IN HEALTHCARE MARKET, BY END USER, 2023-2028 (USD MILLION)	207

TABLE 183	REST OF THE WORLD: AI IN HEALTHCARE MARKET, BY APPLICATION, 2019-2022 (USD MILLION)	208
TABLE 184	REST OF THE WORLD: AI IN HEALTHCARE MARKET, BY APPLICATION, 2023-2028 (USD MILLION)	208
10.5.1	SOUTH AMERICA	209
10.5.1.1	High investments in healthcare IT to encourage market growth	209
10.5.2	MIDDLE EAST AND AFRICA	209
10.5.2.1	Growing healthcare expenditure in Middle East and North Africa to foster growth of AI in healthcare market	209
TABLE 185	MIDDLE EAST AND AFRICA: RECENT DEVELOPMENT	210
11	COMPETITIVE LANDSCAPE	211
11.1	INTRODUCTION	211
11.2	MARKET EVALUATION FRAMEWORK	211
TABLE 186	OVERVIEW OF STRATEGIES DEPLOYED BY KEY PLAYERS IN AI IN HEALTHCARE MARKET	211
11.2.1	PRODUCT PORTFOLIO	213
11.2.2	REGIONAL FOCUS	213
11.2.3	MANUFACTURING FOOTPRINT	213
11.2.4	ORGANIC/INORGANIC GROWTH STRATEGIES	213
11.3	REVENUE ANALYSIS OF TOP PLAYERS IN AI IN HEALTHCARE MARKET	214
FIGURE 57	FIVE-YEAR REVENUE ANALYSIS OF TOP PLAYERS IN AI IN HEALTHCARE MARKET	214
11.4	MARKET SHARE ANALYSIS, 2022	215
TABLE 187	AI IN HEALTHCARE MARKET: DEGREE OF COMPETITION	215
11.5	COMPANY EVALUATION QUADRANT	217
11.5.1	STARS	217
11.5.2	PERVASIVE PLAYERS	217
11.5.3	EMERGING LEADERS	218
11.5.4	PARTICIPANTS	218
FIGURE 58	AI IN HEALTHCARE MARKET: COMPANY EVALUATION QUADRANT, 2022	218
11.6	STARTUP/SME EVALUATION QUADRANT	219
11.6.1	PROGRESSIVE COMPANIES	219
11.6.2	RESPONSIVE COMPANIES	219
11.6.3	DYNAMIC COMPANIES	219
11.6.4	STARTING BLOCKS	219
FIGURE 59	AI IN HEALTHCARE MARKET: STARTUP/SME EVALUATION QUADRANT, 2022	220
11.7	AI IN HEALTHCARE MARKET: COMPANY FOOTPRINT	221
TABLE 188	COMPANY FOOTPRINT	221
TABLE 189	COMPANY OFFERING FOOTPRINT	221
TABLE 190	END-USER FOOTPRINT OF COMPANIES	222
TABLE 191	REGIONAL FOOTPRINT OF COMPANIES	222
11.8	COMPETITIVE BENCHMARKING	223
TABLE 192	STARTUPS/SMES MATRIX: DETAILED LIST OF KEY STARTUPS	223
TABLE 193	AI IN HEALTHCARE MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES	224
11.9	COMPETITIVE SCENARIOS AND TRENDS	225
11.9.1	PRODUCT LAUNCHES & DEVELOPMENTS	225
TABLE 194	AI IN HEALTHCARE MARKET: PRODUCT LAUNCHES & DEVELOPMENTS, JANUARY 2019-DECEMBER 2022	225
11.9.2	DEALS	226
TABLE 195	AI IN HEALTHCARE MARKET: DEALS, JANUARY 2019-DECEMBER 2022	226

**Artificial Intelligence in Healthcare Market by Offering (Hardware, Software, Services), Technology (Machine Learning, NLP, Context-aware Computing, Computer Vision), Application, End User and Region - Global Forecast to 2028**

Market Report | 2023-02-02 | 292 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2025-05-20

Signature

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)