North America Medical Imaging Software - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The North America Medical Imaging Software Market size is estimated at USD 2.63 billion in 2024, and is expected to reach USD 4.01 billion by 2029, growing at a CAGR of 8.79% during the forecast period (2024-2029).

Key Highlights
-The growing demand for medical imaging devices is one of the major factors driving the development and adoption of medical imaging software. Medical imaging devices such as X-rays, CT scanners, MRI machines, and ultrasound machines produce vast data in digital images. Medical imaging software processes, analyzes and manages this data, allowing healthcare professionals to make accurate diagnoses and develop effective treatment plans.
-The increasing prevalence of chronic diseases such as cancer, cardiovascular disease, and neurological disorders is fueling the demand for medical imaging devices and software. In addition, technological advancements, such as machine learning and artificial intelligence, enable medical imaging software to provide more accurate and precise diagnoses.
-Medical imaging is also increasing due to the growing aging population in North America. As the population ages, there is a higher incidence of chronic diseases and conditions that require medical imaging for diagnosis and treatment. The increased competition among players in the market is leading to a greater focus on patient care and outcomes, and medical imaging is a critical component of this. Medical imaging provides healthcare providers valuable information to make accurate diagnoses, develop treatment plans, and monitor patient progress.
-Security issues are a primary factor restraining the growth of the medical imaging software market. Medical imaging software stores and manages sensitive patient data, including medical images, personal information, and medical records. As such, there is a significant risk of this data being compromised or stolen, which can severely affect patient privacy and safety.
-The COVID-19 pandemic significantly impacted the North American medical imaging software market. With the outbreak of the pandemic, healthcare providers in North America faced unprecedented challenges in delivering patient care, and medical imaging

software played a critical role in managing and analyzing patient data remotely. The post-COVID-19 period will likely see continued demand for medical imaging software. The focus on telemedicine and remote patient care is expected to persist, and medical imaging software will play a critical role in enabling remote consultations and diagnoses.

North America Medical Imaging Software Market Trends

Dental Application Segment is Expected to Hold Significant Market Share

- Medical imaging software is commonly used in dental applications to assist with the diagnosis and treatment planning of various dental conditions. There are several types of imaging software used in dentistry.
- The software analyzes digital images of the patient's teeth and surrounding structures. It can be used to measure the size and shape of teeth, detect cavities or other dental issues, and track changes over time. According to the US Department of Veterans Affairs, The number of visits (or patients treated) at the Department of Veteran Affairs in the United States in 2013 was approximately 4.18 million people in dental care. Some veterans may seek dental care outside of the VA system due to long wait times or limited availability of dental services at VA clinics. The number of Dental care at the Department of Veteran Affairs in the United States is expected to drop to around 3.51 million by 2025.
- The software lets dentists capture high-quality digital X-ray images of a patient's teeth and surrounding structures. The images can be easily manipulated to enhance the details and provide a clearer view of dental issues.
- The software uses cone beam computed tomography (CBCT) technology to capture 3D images of the patient's teeth and jaw. This type of imaging provides detailed information about the teeth, bone, and soft tissue structures, which is especially useful in implant planning and orthodontic treatment.
- Medical imaging software plays a crucial role in dental applications by providing dentists with the detailed information they need to accurately diagnose and treat various dental conditions.

United States is Expected to Hold a Significant Market Share

- The medical imaging software market in the United States is one of the largest and most mature markets globally. The country has a well-established healthcare infrastructure and high adoption rates of advanced medical imaging technologies, which has driven the growth of the medical imaging software market.
- The medical imaging software market in the United States is expected to grow, driven by technological advancements, increasing demand for diagnostic procedures, and the need for faster and more accurate diagnostic results. Several medical imaging software tools are used to diagnose and manage lung and bronchus cancer. According to the American Cancer Society, it is estimated that in 2023 there will be approximately 2,38,340 new lung and bronchus cancer cases in the United States. The maximum number of these cases is estimated to be in Florida.
- The United States medical imaging software market is also expected to benefit from the increasing investment in research and development activities to develop more advanced medical imaging technologies. Additionally, the growing adoption of artificial intelligence and machine learning in medical imaging software is expected to drive market growth in the coming years.
- Furthermore, in October 2022, Enlitic, one of the leading healthcare IT firms, announced a new partnership with MULTI Inc., a healthcare technology provider of authentic parts, equipment, and services. The partnership is expected to significantly impact the healthcare industry by improving the operational efficiencies of radiology departments across the United States. By leveraging advanced healthcare IT solutions like the Enlitic Curie platform, healthcare providers can achieve better patient outcomes while reducing costs and improving productivity.
- Moreover, in April 2023, Annalise.ai, a global Medical Imaging and radiology artificial intelligence (AI) startup, announced that it

gained FDA 510(k) approvals for an additional seven results as part of the firm's AI-assisted triage and notification (CADt) solutions. The clearances, which include a suite of time-sensitive stroke results and an extension of chest X-ray findings, build on Annalise's momentum and development plan in the United States market.

North America Medical Imaging Software Industry Overview

North America Medical Imaging Software Market is highly fragmented, with major players like Toshiba, Riverain Technologies, Siemens Healthineers, Medviso, and MIM Software. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

In September 2022, the Philips Foundation and RAD-AID International formed a multi-year cross-continental agreement to provide ultrasound services to 50 million individuals in low- and middle-income nations, including those in the North American Region.

In June 2022, Siemens Healthineers announced the company's Technology Optimization Partnerships launch at the Association for the Advancement of Medical Instrumentation (AAMI) eXchange event in San Antonio, TX. Technology Optimization Partnerships were a strategic approach to multivendor service that leveraged connected solutions to help hospitals and health systems make data-driven decisions, improve equipment utilization, and enhance financial performance across the enterprise.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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