

Oncology Information System Market Assessment, By Product and Service [Patient Information Systems, Treatment Planning Systems, Treatment Management and Medical Image Analysis Systems, Consulting and Optimization Services, Implementation Services, Post-sale and Maintenance Services], By Application [Medical Oncology, Radiation Oncology, Surgical Oncology], By End-user [Hospitals, Cancer Care Centers, Government Institutes, Research Facilities, Others], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global oncology information system market is projected to witness a CAGR of 7.35% during the forecast period 2024-2031, growing from USD 3.23 billion in 2023 to USD 5.7 billion in 2031. The growth of the oncology information system (OIS) market is primarily fueled by the increasing prevalence of cancer cases worldwide. There's a rising demand for OIS to streamline patient information and data management, leading to a surge in various types of OIS software. Additionally, increasing investments in cancer research by companies are anticipated to propel market expansion. Governments are increasing their funding for oncology research and development, aligning with the World Health Organization's goal of eliminating cervical cancer as a public health concern by 2030. Such initiatives not only raise awareness but also drive market growth.

In August 2022, the Koita Centre for Digital Oncology (KCDO) was established by the National Cancer Grid (NCG) to promote digital technology and tools for enhancing cancer care across India. The Koita Foundation provided funding for the center's establishment, with commitments for continued support over the next five years. An MoU was signed between the Tata Memorial Centre and Koita Foundation at the Tata Memorial Hospital in Mumbai. These initiatives were expected to contribute to market

growth and enhance cancer care in India. The KCDO aims to serve as a platform for collaboration and knowledge exchange among oncology healthcare professionals, researchers, and innovators. Moreover, the center plans to develop and implement digital solutions to enhance cancer screening, diagnosis, and treatment outcomes.

Rising Occurrence of Cancer Cases

The integration of technology and software systems plays a vital role in cancer treatment, given that cancer remains a significant global cause of mortality. The increasing prevalence of cancer, particularly among the elderly due to lifestyle changes, is a key driver for the demand for oncology information systems. Projections for 2022 anticipated 20 million new cancer cases and 9.7 million deaths from the disease, with approximately 53.5 million survivors within five years of diagnosis. Statistics show that one in five individuals will face a cancer diagnosis during their lifetime, with one in nine men and one in twelve women succumbing to the disease. Electronic health record (EHR) systems are being adopted to support evidence-based decision-making among healthcare professionals and streamline patient care coordination. Oncology information systems manage EHRs, improving patient-centric services, understanding disease etiology, enabling early disease detection, and facilitating access to more effective treatment modalities. The demand for precise and efficient radiation detection systems is critical for ensuring patients receive accurate radiation dosages during treatment. Advancements in cancer care are moving towards precision medicine and tailored treatment plans, emphasizing the importance of leveraging information systems to utilize diagnostic results from advanced technologies effectively. These systems store, process, and share documentation, enabling thorough analysis of diagnoses and the formulation of appropriate treatment strategies. As per an article published in January 2022, by the American Cancer Society Journal, the number of cancer cases reported has increased to approximately 1.9 million in the United States. Rapid Growth in Healthcare IT

The healthcare IT market intersects with various sectors, including medical technology, healthcare, medical devices, and digital health, reshaping traditional healthcare delivery and research systems through modern technological advancements. An integrated healthcare IT ecosystem addresses gaps in oncology care continuity while streamlining processes and reducing inefficiencies. It minimizes healthcare redundancies, enabling hospital systems to deliver patient-centric care seamlessly across healthcare providers. Consequently, adopting different healthcare IT solutions, such as EMR, RIS, PACS, VNA, and treatment planning solutions, has led healthcare organizations to decrease operational expenses while enhancing the quality of care, driving market demand among major end-user segments.

The market is propelled by the increasing adoption of cloud-based solutions, which offer numerous advantages over traditional on-premises alternatives, including enhanced accessibility, scalability, and cost-effectiveness. Cloud-based solutions facilitate seamless integration with EHR systems and other healthcare IT platforms, facilitating the sharing and collaboration of patient data across various healthcare settings. Al and ML algorithms streamline the analysis and interpretation of intricate medical imaging data, enhancing cancer diagnosis and treatment planning accuracy and efficiency.

In February 2023, New Jersey Cancer Care announced the commencement of remote patient monitoring services to drive innovation in oncology. The cancer care center integrates medical devices with patient apps through this initiative, fostering a more connected and proactive approach to patient care.

Dominance of Radiation Oncology

Through the projected period, radiation oncology is expected to experience significant growth at an impressive CAGR. Radiation therapy constitutes a vital aspect of cancer treatment, given the global prominence of cancer as a leading cause of mortality. With the increasing adoption of radiosurgery, the demand for radiation oncology has surged, leading radiological departments to generate extensive data on cancer cases. Effective radiation therapy necessitates treatment planning and simulation to precisely administer radiation doses to target tumors while minimizing harm to surrounding healthy tissues. Oncology information systems offer specialized tools and modules tailored for radiation treatment planning, encompassing dose calculations, treatment simulations, contouring, and image fusion. These systems empower radiation oncologists to devise optimal treatment strategies and simulate the delivery process, ensuring precision and safety. Furthermore, the growing global demand for radiation therapies in cancer treatment catalyzes the segment's expansion. The imperative for precise and efficient radiation detection systems arises to ensure patients receive the correct radiation dosage during treatment. Diagnostic imaging techniques employing ionizing radiation, such as CT scans, PET scans, and X-rays, play a crucial role in cancer diagnosis. Increased government investment in healthcare, as evidenced by data from the National Institutes of Health indicating a rise in US healthcare expenditure for

biomedical imaging from USD 2.7 billion in 2022 to USD 3.1 billion in 2023, is also driving the demand for oncology information systems. In February 2024, Kormek Group was awarded []1.3 million (USD 1.6 million) to participate in the Intelligent Radiation Sensor Readout System (i-RASE) project for developing a new class of radiation sensors powered by artificial intelligence (AI). North America Is Dominating the Global Oncology Information System Market

North America is poised to dominate the oncology information system market throughout the projected timeframe. This can be attributed to factors like the increasing incidence of cancer and the presence of advanced healthcare infrastructure. According to the cancer facts and figures report for 2023 from the American Cancer Society, approximately 1.9 million new cancer cases are expected to be diagnosed in 2023. Notably, prostate cancer is projected to lead with an estimated 288,300 cases, followed by lung cancer with 238,340 cases, and female breast cancer with 300,590 cases. Similarly, data released by the Government of Canada in May 2022 revealed that around 233,900 Canadians received cancer diagnoses in 2022, with prostate cancer anticipated to remain the most diagnosed cancer type. Additionally, increasing awareness campaigns related to cancer are anticipated to drive market growth in the region. The cancer awareness month in September in the United States highlights the government's commitment to support patients and their families, improving access to care, and promoting the importance of early detection. These efforts are likely to raise awareness about cancer and contribute to market expansion in North America over the forecast period.

Future Market Scenario (2024 [] 2031F)

The rise in cancer patients presents the biggest opportunity for the growing oncology information system market. Advanced and effective approaches have been devised to ensure faster recovery and better results for keeping health in check for cancer patients. R&D and heavy investments made by healthcare giants are promoting developments in the oncology information system market, and this is a huge advantage for this market to flourish in the coming years. New companies in this area are introducing themselves with cutting-edge technologies. In May 2022, Berry Oncology, a firm specializing in genetic testing and early tumor screening, introduced a HIFI system comprising HIFI-det liquid biopsy technology and the corresponding HIFI-cal algorithm series. Successful attempts made towards the betterment of technology also pushes people to further engage with a higher quality of self-care and this paves a way for the market to rise.

Key Players Landscape and Outlook

Several companies, such as Siemens Healthineers, F. Hoffmann-La Roche AG, McKesson Corporation, Koninklijke Philips N.V., GE HealthCare Technologies, Inc., Elekta AB, IBM Corporation, Oracle Cerner, Epic Systems Corporation, and RaySearch Laboratories AB, are focusing on market expansion and product launch and development. Oncology information system market participants are poised to encounter promising growth prospects in the global market, driven by the increasing demand for healthcare IT solutions. The primary focus of these leading players is directed towards the rapidly expanding market segment, aiming to thrive and excel in an intensely competitive market environment. Additionally, these market players emphasize collaboration and license agreements as strategic initiatives anticipated to propel market growth.

In May 2022, GE Healthcare partnered with RaySearch Laboratories AB, a provider of radiation oncology software, to develop an innovative radiation therapy simulation and treatment planning workflow solution. This collaboration aims to streamline the radiation targeting process to reduce tumor size.

In September 2022, the International Agency for Research on Cancer announced initiating a new research initiative financed by the European Union (EU). The project's primary objective is to enhance the region's cancer screening data collection systems.

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