

Multimodal Imaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Multimodal Imaging Market Analysis

The Multimodal Imaging Market size is estimated at USD 4.38 billion in 2025, and is expected to reach USD 5.63 billion by 2030, at a CAGR of 5.17% during the forecast period (2025-2030). Growth is shaped by health-system emphasis on hybrid diagnostic platforms that merge anatomical and functional data, strengthening early detection and treatment-monitoring accuracy in oncology and cardiology. Artificial-intelligence overlays automate scan protocols, shorten exam times, and elevate diagnostic confidence, while regulatory approvals for next-generation devices accelerate market adoption. North America retains leadership through robust reimbursement and wide theranostic radiopharmaceutical use, yet Asia-Pacific delivers the fastest trajectory on the back of hospital modernization, chronic-disease burden, and expanding private healthcare investment. The competitive field remains moderately consolidated around GE Healthcare, Siemens Healthineers, and Philips, each leveraging cloud-based analytics to differentiate performance and reduce ownership costs. Persistent headwinds-capital intensity, isotope-supply volatility, and data-integration hurdles-temper the otherwise positive outlook for the multimodal imaging market.

Global Multimodal Imaging Market Trends and Insights

Growing Prevalence of Chronic Diseases

Rising incidence of cancer and cardiovascular disorders keeps demand for sophisticated diagnostics high. Multimodal imaging delivers metabolic-anatomical correlation that single-modality exams cannot match, positioning the modality at the centre of

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preventive-care strategies. Cardiovascular MRI contributed measurable cost savings and outcome gains in a 361-patient study, underscoring health-economic value. Utilisation is projected to climb 27% in 30 years, reflecting demographic ageing and expanding clinical protocols rather than population growth alone. Oncology PET/CT volumes will benefit directly, as metabolic mapping improves early tumour detection and response assessment. The sustained rise in non-communicable disease prevalence therefore injects durable momentum into the multimodal imaging market.

Technological Advancements in Hybrid Modalities

Hybrid scanners now integrate AI to automate protocols and sharpen image clarity. Siemens Healthineers' Biograph Horizon employs 4 × 4 mm LSO crystals and true time-of-flight, delivering high-resolution studies at reduced dose. Total-body PET enables dynamic acquisition, producing superior contrast while shrinking acquisition windows. Philips and NVIDIA jointly built MR foundation models that allow "zero-click" planning, promoting reproducibility and faster throughput. Such advances reduce technologist workload, increase scanner utilisation, and strengthen clinical-decision support-elements that fuel uptake across the multimodal imaging market.

High Capital and Maintenance Costs

Hybrid scanners require multi-million-dollar outlays and specialised upkeep, hampering acquisition in budget-constrained settings. Emergency-department studies show that although multimodal CT elevates diagnostic certainty for dizziness, economic burden deters blanket implementation. Reimbursement frameworks often trail innovation, amplifying payback risk and limiting diffusion across the multimodal imaging market. The diagnostic imaging market faces consolidation pressures as providers seek economies of scale to manage these cost challenges while maintaining service quality standards.

Other drivers and restraints analyzed in the detailed report include:

Rising Demand for Early Cancer Diagnosis / Increasing PET/CT Use in Cardiology Workflows / Inadequate Imaging Infrastructure (Emerging Markets) /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

PET/CT systems accounted for 61.86% of the multimodal imaging market share in 2024, supported by broad clinical guidelines and mature reimbursement pathways. This technology underpins cancer staging, myocardial perfusion, and neurological metabolism evaluation, making it indispensable for hospital workflows. The multimodal imaging market size for PET/CT is growing closely with expanding oncology caseloads. Vendors differentiate via detector materials, longer axial field-of-view, and AI-assisted protocol optimisation to shrink radiation dose and speed throughput.

PET/MR, though currently smaller, records a 6.16% CAGR, buoyed by unparalleled soft-tissue contrast and reduced ionising exposure. Advances in deep-learning reconstruction, such as Philips SmartSpeed Precise, now cut exam times and improve SNR, making PET/MR more workflow-friendly. The multimodal imaging market size for PET/MR is projected to grow in the coming years as oncology centres adopt the modality for paediatric and neuro-oncology indications. SPECT/CT sustains demand in bone metastasis and cardiology perfusion, where isotope costs remain manageable. Niche combinations, including ultrasound/CT, hold specialised roles in interventional suites, rounding out the technology mix within the multimodal imaging market.

The Multimodal Imaging Market Report is Segmented by Technology (PET/CT Systems, SPECT/CT Systems, PET/MR Systems, Others), Application (Oncology, Cardiology, Neurology, Ophthalmology, Musculoskeletal Disorders, Others), End-User (Hospitals,

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Diagnostic Imaging Centers, Others), and Geography (North America, Europe, Asia-Pacific, Middle East and Africa, South America). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America's multimodal imaging market size reached USD 1.76 billion in 2024, equivalent to 40.16% global share, reflecting comprehensive insurance coverage and rapid AI workflow integration. Concentrated expertise at academic medical centres accelerates technology diffusion, while cross-border collaborations enhance Canadian capacity. Mexico's private hospitals seize market openings generated by medical tourism, adding incremental demand for hybrid scanners.

Asia-Pacific posts the highest CAGR at 6.84%. China funds large-scale oncology and cardiology programmes that mandate PET/CT inclusion, whereas Japan upgrades ageing scanners to maintain diagnostic excellence for an elderly population. India's private networks install digital PET/CT and 1.5T helium-free MRI in tier-1 cities, widening access. Australia and South Korea adopt cutting-edge platforms comparable to Western peers, reinforcing regional momentum.

Europe maintains a mature yet expanding base, with Germany spearheading innovation through local manufacturing and R&D. Unified valuation frameworks under the European Health Technology Assessment Regulation streamline procurement, underpinning continued adoption. Southern European nations deploy EU-funded tele-imaging initiatives that link rural clinics to urban centres, integrating portable PET/CT to extend reach. Collectively these dynamics keep Europe's multimodal imaging market on a stable growth.

List of Companies Covered in this Report:

GE Healthcare / Siemens Healthineers / Koninklijke Philips / Canon / United Imaging Healthcare / Mediso / Neusoft Medical Systems Co. Ltd. / Spectrum Dynamics Medical / MILabs / Bruker / Cubresa Inc. / Digirad / Positron Corp. / Shimadzu / Carestream Health / SurgicEye GmbH / Agfa-Gevaert /

Additional Benefits:

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

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