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Global Medical Oncology Software Market Size Study & Forecast, by Deployment Type (Clouds, On-premise, Hybrid), By by Application (Treatment Planning, Patient Record Management, Clinical Decision Support, Others), By by End User (Hospitals & Specialty Clinics, Diagnostic Centers, Research Institutes, Others), and Regional Analysis, 2023-2030

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Abstracts

Global Medical Oncology Software Market is valued at approximately USD 2.40 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 7.5% over during the forecast period 2023-2030. Medical oncology software is a vital oncology informatics system, supporting healthcare providers in the precise administration of systemic cancer treatments such as chemotherapy, targeted therapy, immunotherapy, and hormone therapy. This software streamlines patient data management, treatment planning, medication scheduling, clinical decision support, and monitoring of treatment side effects for oncologists. The overall market growth is fueled by several key factors, including the increasing prevalence of cancer, a rise in research activities utilizing oncology informatics, rising adoption of Electronic Health Records (EHR) for cohesive treatment strategies, development of personalized treatment plans using genomic data the ongoing digitization of healthcare services, and increased investment in enhancing cancer care.

In addition, the surge in cancer cases is set to propel the demand for medical oncology software, crucial for patient record management and treatment planning. There is a significant strain on healthcare systems with the increasing number of new cancer cases globally. Efficient management across diagnosis and treatment becomes imperative, intensifying the need for medical oncology software. For instance, an article

published by the American Cancer Society in January 2023 forecasts a rise in new cancer cases to 1,958,310 in 2023, accompanied by an estimated 609,820 cancer-related deaths in the U.S. Additionally, cancer prevalence is higher among geriatric patients due to weakened immunity, further driving the incidence of cancer and consequently fueling market growth throughout the forecast period. Thus, these aforementioned factors are propelling the growth of the Medical Oncology Software Market during the estimated period of 2023-2030. Furthermore, increasing technological advancements and the proliferation of cancer drug development significantly contribute to the present various lucrative opportunities over the forecast years. However, the growing risk of cyber-attackcyber-attacks and data breaching activities and the high cost and complex integration are is challenging the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Medical Oncology Software Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to the rising trend of centralized care, the growing establishment of cancer care centers, and the increase in technological advancements in oncology software. Whereas, Asia Pacific is expected to grow at the highest CAGR over the forecast years. The increase in the incidence of cancer, the expanding aging population, the emergence of key players, growing investment opportunities, and an increasing influx of companies developing oncology software solutions are significantly propelling the market demand across the region. For instance, in August 2022, The National Cancer Grid (NCG) inaugurated the Koita Centre for Digital Oncology (KCDO) aimed at advancing cancer care through digital technologies and tools across India. The KCDO supports NCG hospitals by facilitating the adoption of digital health tools, implementing digital health practices, and spearheading technology initiatives such as healthcare data interoperability and Electronic Medical Record (EMR) adoption.

Major market players included in this report are:

Epic Systems Corporation (U.S.)

Altai, Inc. (U.S.)

Varian Medical Systems, Inc. (Siemens Healthineers AG) (U.S.)

Cerner Corporation (Oracle) (U.S.)

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American Medical Software (U.S.)

Elekta (Sweden)

EndoSoft LLC (U.S.)

RaySearch Laboratories (Sweden)

Mckesson Corporation (U.S.)

Koninklijke Philips N.V. (Netherlands)

Recent Developments in the Market:

In April 2023, Epic Systems Corporation announced an expansion of its collaboration with Microsoft, focusing on integrating generative artificial Artificial intelligence Intelligence (AI) technology into electronic health records. This partnership aims to enhance providers' productivity, alleviate administrative burdens, and elevate patient care by granting clinicians more time to dedicate to their patients.

In February 2023, Varian Medical Systems, Inc., operating under Siemens Healthineers, unveiled its collaboration with Nova Scotia Health to expedite the digital transformation of the health system's comprehensive oncology service line. Through this collaboration, Varian Medical Systems, Inc. endeavours to offer a range of multidisciplinary oncology solutions aimed at fostering connectivity among cancer patients and optimizing patient care across their entire cancer care continuum.

Global Medical Oncology Software Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive

Landscape, Growth factors, and Trends

Segments Covered - Deployment Type, Application, End User, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Deployment Type:

Clouds

On-premise

Hybrid

By Application:

Treatment Planning

Patient Record Management

Clinical Decision Support

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Others

By End User:

Hospitals & Specialty Clinics

Diagnostic Centers

Research Institutes

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

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Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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