

Global Generative AI in Healthcare Market - 2025-2033

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Abstracts

Global Generative AI in Healthcare Market - Overview

The global generative AI in healthcare market reached US\$ 2.92 Billion in 2024 and is expected to reach US\$ 30.68 Billion by 2033, growing at a CAGR of 35.1% during the forecast period 2025-2033.

Generative AI in healthcare refers to the utilization of advanced artificial intelligence technologies that can create new data, insights, and content based on existing healthcare information. This innovative approach employs sophisticated algorithms, including machine learning and deep learning techniques, to analyze extensive amounts of unstructured data, such as medical records, imaging data, and clinical notes.

The primary objective is to enhance various facets of healthcare delivery, including diagnostics, treatment planning, patient engagement, and operational efficiency. This market is primarily driven by the increasing demand for personalized healthcare solutions and advancements in AI and machine learning technologies.

Opportunities include integration with real-time decision support and predictive analytics abound in areas such as drug discovery-where generative AI is expected to facilitate the market expansion. Key trends include the integration of generative AI with large healthcare datasets to generate synthetic data, enhance diagnostic accuracy, and create tailored treatment plans.

Global Generative AI in Healthcare Market Dynamics: Drivers

Increasing demand for personalized healthcare solutions

The healthcare industry is increasingly embracing personalized medicine, which tailors

treatment plans to the specific needs of patients based on their genetic profiles, medical histories, and lifestyle factors. Generative AI in healthcare plays a vital role in this transition by analyzing large datasets to identify patterns and correlations that inform personalized treatment strategies.

Generative AI in healthcare excels at processing vast amounts of unstructured data, including electronic health records (EHRs), genomic data, and clinical notes. This capability allows healthcare providers to create comprehensive health profiles for patients, which can be used to tailor interventions more effectively. By synthesizing diverse data types, generative AI helps identify risk factors and health trends specific to individual patients, facilitating proactive care and early intervention.

Furthermore, major players in the industry have key initiatives and product launches that would drive the global generative AI in healthcare market growth. For instance, as per Microsoft Azure news in June 2023, generative AI has the potential to revolutionize medical research, diagnosis, treatment, and patient care by enabling healthcare providers to increase efficiency, personalize care, and enhance decision-making processes. Generative AI in healthcare empowers researchers to analyze vast amounts of medical data rapidly and efficiently. It automates data extraction and document reviews, significantly reducing the time spent on administrative tasks.

Similarly, in April 2024, the World Health Organization (WHO) announced the launch of S.A.R.A.H., which stands for Smart AI Resource Assistant for Health. This innovative digital health promoter prototype is powered by generative artificial intelligence (AI) and is designed to enhance public health engagement ahead of World Health Day, which focuses on the theme "My Health, My Right."

Also, in October 2024, Amazon One Medical integrated advanced AI technology into its healthcare services, leveraging AWS generative AI services, including Amazon Bedrock and AWS HealthScribe, to help doctors save time and enhance patient care. All these factors drive the global generative AI in healthcare market.

Moreover, the rising demand for the growth of integration with telemedicine contributes to the global generative AI in healthcare market expansion.

Global Generative AI in Healthcare Market Dynamics: Restraints

Data security and privacy concerns

Generative AI in healthcare systems often requires access to large volumes of sensitive patient data, including electronic health records (EHRs), medical imaging, and personal health information (PHI). This data is highly confidential and must be protected to maintain patient trust and comply with legal standards.

In the US, HIPAA establishes strict guidelines for handling PHI. Healthcare organizations must ensure that any technology they utilize complies with these regulations. This includes implementing safeguards to protect the confidentiality, integrity, and availability of PHI. For instance, any generative AI tool used in a healthcare setting must undergo a thorough security review and have a signed Business Associate Agreement (BAA) with the provider to ensure compliance.

According to the National Center for Biotechnology Information (NCBI) research publication in March 2024, the integration of generative AI in healthcare offers transformative potential, but it also introduces significant privacy and security risks due to its extensive data requirements and inherent opacity. Generative AI systems necessitate access to vast amounts of sensitive patient data, including electronic health records (EHRs), medical imaging, and personal health information (PHI). Thus, the above factors could be limiting the global generative AI in healthcare market's potential growth.

Global Generative AI in Healthcare Market - Segment Analysis

The global generative AI in healthcare market is segmented based on component, application, end-user, and region.

Application:

The diagnostics & medical imaging application segment is expected to hold 33.2% of the global generative AI in healthcare market

The diagnostics & medical imaging segment is a crucial component of the generative AI in healthcare market, significantly enhancing healthcare professionals' capabilities to analyze and interpret medical images. The integration of generative AI in healthcare technologies has transformed traditional imaging practices, leading to improved diagnostic accuracy and operational efficiency.

Generative AI in healthcare technologies, such as generative adversarial networks (GANs) and variational autoencoders (VAEs), equip healthcare providers with advanced

tools for analyzing complex medical images, including MRIs, CT scans, and X-rays. These models enhance diagnostic accuracy by identifying subtle abnormalities that may be overlooked by human practitioners, thereby facilitating early disease detection.

Furthermore, major players in the industry product launching products that would drive the global generative AI in healthcare market growth. For instance, in September 2024, Harrison.ai launched a radiology-specific vision language model named Harrison. rad.1, marking a significant advancement in healthcare artificial intelligence. This model is designed to address specific needs in the field of radiology, enhancing the capabilities of AI in medical imaging and diagnostics.

Also, in December 2023, Google launched MedLM, a suite of generative AI models specifically designed for the healthcare industry. This initiative is part of Google's ongoing efforts to leverage artificial intelligence to enhance healthcare delivery and improve patient outcomes. These factors have solidified the segment's position in the global generative AI in healthcare market.

Global Generative AI in Healthcare Market – Geographical Analysis

North America is expected to hold 40.6% of the global generative AI in healthcare market

Healthcare institutions across North America, including hospitals, clinics, and diagnostic centers, are increasingly recognizing the potential of generative AI. The integration of AI into clinical workflows is viewed as a means to enhance diagnostic accuracy, optimize treatment planning, and improve patient outcomes. This trend is bolstered by a growing body of evidence supporting the effectiveness of AI technologies in various clinical domains such as radiology, pathology, and cardiology.

Rapid advancements in generative AI technologies, including Generative Adversarial Networks (GANs) and Variational Autoencoders (VAEs), enable more effective analysis of complex medical data. These technologies allow healthcare providers to generate synthetic data for training machine learning models, thereby improving diagnostic capabilities and facilitating personalized medicine.

Furthermore, in this region, a major number of key players' presence, well-advanced healthcare infrastructure, government initiatives & regulatory support, investments, and product launches would propel the global generative AI in healthcare market.

For instance, in February 2024, in New Jersey, CitiusTech launched an industry-first solution for healthcare organizations to help address the reliability, quality, and trust requirements for generative AI in healthcare solutions. The CitiusTech Gen AI Quality & Trust solution will help organizations design, develop, integrate, and monitor quality and facilitate trust in Generative AI applications, providing the confidence needed to adopt and scale Gen AI applications enterprise-wide.

Also, in June 2024, in New Jersey, Cognizant launched its first set of healthcare large language model (LLM) solutions as part of an expanded generative AI partnership with Google Cloud. This initiative aims to harness the power of generative AI in healthcare to address various challenges in the healthcare sector, enhancing operational efficiency, improving patient care, and streamlining administrative processes. Thus, the above factors are consolidating the region's position as a dominant force in the global generative AI in healthcare market.

Asia Pacific is expected to hold 21.4% of the global generative AI in healthcare market

The Asia-Pacific region is undergoing significant digital transformation, with healthcare systems increasingly adopting advanced technologies. This shift facilitates the integration of generative AI solutions that enhance patient care, streamline processes, and improve operational efficiency.

Countries such as China, India, Japan, and Singapore have vast and diverse patient populations, providing a rich dataset for training generative AI in healthcare models. This diversity enables the development of robust and accurate algorithms that can address unique regional health challenges, improving diagnosis and treatment planning.

Governments across the Asia-Pacific region are actively promoting the adoption of AI technologies in healthcare. They provide funding, infrastructure support, and regulatory frameworks to encourage research and development in generative AI in healthcare industry. These initiatives foster collaborations between industry, academia, and healthcare institutions, accelerating the development and deployment of generative AI solutions.

Furthermore, key players in the industry's technological advancements help to drive the global generative AI in healthcare market growth. For instance, in November 2024, in Japan, healthcare innovators are developing AI-augmented systems to enhance the capabilities of radiologists and surgeons, providing them with "real-time superpowers" to improve patient care and operational efficiency. A notable instance of this advancement

is Fujifilm's collaboration with NVIDIA, which has resulted in the creation of an AI application designed to assist surgeons during procedures.

Also, in October 2024, China made a significant leap in healthcare innovation by announcing the establishment of the world's first AI hospital, known as the Agent Hospital. This pioneering facility, developed by researchers from Tsinghua University, represents an innovative approach to integrating artificial intelligence into medical practice, marking Asia's leadership in healthcare technology. Thus, the above factors are consolidating the region's position as the fastest-growing force in the global generative AI in healthcare market.

Global Generative AI in Healthcare Market - Competitive Landscape

The major global players in the generative AI in healthcare market include IBM, Google LLC, Microsoft, OpenAI, NVIDIA Corporation, Oracle, Johnson & Johnson Services, Inc., NioyaTech, and Saxon. among others.

Global Generative AI in Healthcare Market - Key Developments

In December 2024, DexCom, Inc. launched a proprietary Generative AI (GenAI) platform, making it the first continuous glucose monitor (CGM) manufacturer to integrate GenAI into glucose biosensing technology. The Dexcom GenAI platform leverages advanced AI to analyze individual health data patterns, uncovering direct links between lifestyle choices and glucose levels, and delivering actionable insights to help users improve their metabolic health.

In October 2024, Microsoft announced significant advancements in its Cloud for Healthcare offerings, unveiling several artificial intelligence enhancements aimed at improving healthcare delivery. These enhancements include new healthcare AI models in Azure AI Studio, enhanced data capabilities in Microsoft Fabric, and developer tools within Copilot Studio.

In June 2024, Cognizant unveiled its first suite of healthcare large language model (LLM) solutions developed in collaboration with Google Cloud, leveraging generative AI technologies such as the Vertex AI platform and Gemini models.

In March 2024, NVIDIA Healthcare launched a suite of generative AI microservices aimed at advancing drug discovery, medical technology (MedTech), and digital health. This initiative includes a catalog of 25 new cloud-

agnostic microservices that enable healthcare developers to leverage the latest advancements in generative AI across various applications, including biology, chemistry, imaging, and healthcare data management.

The global generative AI in healthcare market report delivers a detailed analysis with 59 key tables, more than 53 visually impactful figures, and 176 pages of expert insights, providing a complete view of the market landscape.

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