

Global Image-guided Therapy Systems Market - 2025-2033

<https://marketpublishers.com/r/G3718A6D2DA4EN.html>

Date: May 2025

Pages: 165

Price: US\$ 4,350.00 (Single User License)

ID: G3718A6D2DA4EN

Abstracts

Overview

The global image-guided therapy systems market reached US\$ 5.75 billion in 2024 and is expected to reach US\$ 11.16 billion by 2033, growing at a CAGR of 6.1% during the forecast period 2025-2033.

Image-guided therapy systems (IGTS) are advanced medical technologies that use real-time imaging to guide and enhance surgical and interventional procedures. These systems integrate imaging modalities like CT, MRI, ultrasound, and fluoroscopy with surgical tools and navigation software to provide detailed visualization of internal body structures during treatment.

By offering high-resolution, real-time anatomical images, IGTS allows physicians to precisely locate and target diseased tissues while avoiding damage to healthy structures. This results in improved procedural outcomes, reduced complications, shorter recovery times, and enhanced patient safety. IGTS is widely used in oncology, cardiology, neurosurgery, orthopedics, and urology, enabling minimally invasive surgeries and complex interventions.

Market Dynamics: Drivers & Restraints

Rising Demand for Minimally Invasive Procedures

The global image-guided therapy systems (IGTS) market is growing due to the increasing demand for minimally invasive procedures in various clinical specialties. Patients seek surgical options with smaller incisions, lower complications, reduced post-

operative pain, and faster recovery times. Advancements in medical technology and patient preference have led healthcare providers to adopt image-guided systems for complex surgeries like tumor ablation, cardiovascular interventions, and neurosurgical procedures. The growing incidence of chronic diseases, favorable clinical outcomes, and government initiatives drive investment in IGTS to meet evolving patient care standards and improve long-term outcomes.

For instance, in May 2023, Philips launched the Zenition 10 image-guided therapy mobile C-arm system 1000, aiming to expand patient access to routine surgical care and minimally invasive procedures. The system uses Philips' flat panel detector technology for cost-effective, high-quality imaging, enabling surgeons to treat more patients at lower costs and improve outcomes.

Limited Access in Low-Resource Settings

The global image-guided therapy systems (IGTS) market faces challenges due to limited access in low-resource and rural healthcare settings. Infrastructure issues, lack of trained professionals, and inadequate funding hinder the adoption of advanced imaging systems. Additionally, logistical issues in remote areas hinder effective usage. This widens the global healthcare disparity and slows progress towards universal access to advanced surgical care.

Segment Analysis

The global image-guided therapy systems market is segmented based on product type, application, end-user, and region.

Product Type:

The computed tomography (CT) scanner segment is expected to dominate the image-guided therapy systems market with the highest market share.

Computed tomography (CT) scanners are advanced medical imaging devices that use X-ray technology and computer processing to generate detailed cross-sectional images of the body, providing comprehensive views of bones, blood vessels, and soft tissues for diagnosing conditions like tumors, internal injuries, and infections, commonly used in emergency care, oncology, cardiology, and neurology.

The computed tomography (CT) Scanners segment in the Image-guided Therapy

Systems market is gaining popularity due to the demand for real-time, high-resolution imaging during surgical procedures. CT scanners enable precise visualization of anatomical structures, crucial for planning complex surgeries in neurology, cardiology, and oncology.

The integration of AI and 3D imaging capabilities is enhancing diagnostic accuracy and procedural outcomes, leading to increased adoption in hospitals and outpatient settings. The shift towards minimally invasive procedures is also driving demand for intraoperative CT imaging. Factors such as chronic disease burden, geriatric population, and technological advancements are driving market growth.

Geographical Analysis

North America is expected to hold a significant position in the Image-guided Therapy Systems market, with the highest market share

The image-guided therapy systems (IGTS) market in North America is expanding due to high adoption rates of advanced medical technologies, a well-established healthcare infrastructure, and leading medical device manufacturers like GE Healthcare, Medtronic, and Stryker.

The rising prevalence of chronic diseases like cancer, cardiovascular conditions, and neurological disorders has increased demand for minimally invasive procedures. Government support for precision medicine initiatives, funding, and favorable reimbursement policies further boost the market. The growing elderly population in the U.S. and Canada, more prone to complex medical conditions requiring image-guided interventions, also contributes to the market's expansion.

For instance, in January 2025, INOVAIT, the Canadian network for image-guided therapy (IGT) and artificial intelligence (AI), sought applications for its Pilot Fund. The funding was a reimbursement-based initiative to support collaborative research and development projects utilizing AI, machine learning, or big data in IGT technologies. The pilot fund aimed to initiate promising IGT-AI projects, improving patient outcomes and driving economic development in Canada. Applicants could request up to \$150,000 in non-dilutive investment.

Competitive Landscape

The major global players in the image-guided therapy systems market include Philips

Healthcare, Siemens Healthineers, GE Healthcare, Medtronic, Brainlab AG, Olympus Corporation, Stryker Corporation, Varian Medical Systems (a Siemens Healthineers company), and Elekta AB, among others.

Key Developments

In February 2025, Royal Philips launched the Azurion neuro biplane system, a major enhancement to its Image Guided Therapy System. The system streamlines neurovascular procedures, aids care teams in making decisions faster, treats more patients, and improves outcomes. It features enhanced 2D and 3D imaging and X-ray detector positioning flexibility.

Why Purchase the Report?

Technological Innovations: Reviews ongoing clinical trials, product pipelines, and forecasts upcoming advancements in medical devices and pharmaceuticals.

Product Performance & Market Positioning: Analyzes product performance, market positioning, and growth potential to optimize strategies.

Real-World Evidence: Integrates patient feedback and data into product development for improved outcomes.

Physician Preferences & Health System Impact: Examines healthcare provider behaviors and the impact of health system mergers on adoption strategies.

Market Updates & Industry Changes: Covers recent regulatory changes, new policies, and emerging technologies.

Competitive Strategies: Analyzes competitor strategies, market share, and emerging players.

Pricing & Market Access: Reviews pricing models, reimbursement trends, and market access strategies.

Market Entry & Expansion: Identifies optimal strategies for entering new markets and partnerships.

Regional Growth & Investment: Highlights high-growth regions and investment opportunities.

Supply Chain Optimization: Assesses supply chain risks and distribution strategies for efficient product delivery.

Sustainability & Regulatory Impact: Focuses on eco-friendly practices and evolving regulations in healthcare.

Post-market Surveillance: Uses post-market data to enhance product safety and access.

Pharmacoeconomics & Value-Based Pricing: Analyzes the shift to value-based pricing and data-driven decision-making in R&D.

The global image-guided therapy systems market report delivers a detailed analysis with 70 key tables, more than 74 visually impactful figures, and 165 pages of expert insights, providing a complete view of the market landscape.

Target Audience 2024

Manufacturers: Pharmaceutical, Medical Device, Biotech Companies, Contract Manufacturers, Distributors, Hospitals.

Regulatory & Policy: Compliance Officers, Government, Health Economists, Market Access Specialists.

Application & Innovation: AI/Robotics Providers, R&D Professionals, Clinical Trial Managers, Pharmacovigilance Experts.

Investors: Healthcare Investors, Venture Fund Investors, Pharma Marketing & Sales.

Consulting & Advisory: Healthcare Consultants, Industry Associations, Analysts.

Supply Chain: Distribution and Supply Chain Managers.

Consumers & Advocacy: Patients, Advocacy Groups, Insurance Companies.

Academic & Research: Academic Institutions.

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