

Global Medical Fluorescence Imaging Agent Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Medical Fluorescence Imaging Agent market size is expected to reach \$ 1897 million by 2032, rising at a market growth of 4.5% CAGR during the forecast period (2026-2032).

Medical fluorescence imaging agents, also known as fluorescent contrast agents or fluorophores, are diagnostic compounds that emit fluorescence upon excitation by specific wavelengths of light, enabling real-time visualization of anatomical structures, pathological lesions, and physiological processes during medical imaging procedures. These agents are widely used in fluorescence-guided surgery, angiography, sentinel lymph node biopsy, and intraoperative tumor detection. Fluorescence imaging agents can be broadly categorized into non-targeted agents (which passively distribute in tissues) and targeted molecular probes (which bind to specific biomarkers). The global average selling price for medical fluorescence imaging agents is approximately US\$82 per unit. The average sales volume in the base year is estimated at 16,548k units. The industry average gross margin is approximately 50%, with typical ranges between 40% and 60%, reflecting the high-value, research-intensive nature of these diagnostic products. The upstream segment includes manufacturers of fluorophore raw materials, chemical synthesis intermediates, and pharmaceutical-grade excipients. The midstream segment comprises imaging agent manufacturers that formulate, synthesize, and distribute finished products. The downstream segment encompasses hospitals, surgical centers, diagnostic imaging facilities, and research institutions that utilize these agents for fluorescence-guided surgery, angiography, cancer detection, and various diagnostic applications.

The medical fluorescence imaging agent market is undergoing significant transformation driven by the convergence of surgical precision demands, technological innovation, and

regulatory approvals for novel targeted agents. The industry is witnessing a fundamental shift from non-specific, passive dyes to highly specific targeted molecular probes that enable precise tumor visualization, improved margin delineation, and detection of occult lesions. This evolution reflects a broader trend toward precision medicine in surgery, where imaging tools are increasingly tailored to disease-specific biomarkers and patient-specific needs.

The growing adoption of fluorescence-guided surgery (FGS) across multiple surgical specialties is a primary market driver. The increasing demand for surgical precision has driven the clinical adoption of contrast agents with improved specificity, safety, and efficacy. Seven FDA-approved intraoperative fluorescence contrast agents—Indocyanine Green (ICG), Fluorescein Sodium, 5-Aminolevulinic Acid (5-ALA), Methylene Blue (MB), Cysview (Hexaminolevulinate), Cytalux (OTL38/ Pafolacianine), and Pegulicianine (LUMISIGHT?)—are now available for clinical use.

This report studies the global Medical Fluorescence Imaging Agent production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Medical Fluorescence Imaging Agent and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Medical Fluorescence Imaging Agent that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Medical Fluorescence Imaging Agent total production and demand, 2021-2032, (K Units)

Global Medical Fluorescence Imaging Agent total production value, 2021-2032, (USD Million)

Global Medical Fluorescence Imaging Agent production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Medical Fluorescence Imaging Agent consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Medical Fluorescence Imaging Agent domestic production, consumption, key domestic manufacturers and share

Global Medical Fluorescence Imaging Agent production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Medical Fluorescence Imaging Agent production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Medical Fluorescence Imaging Agent production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Medical Fluorescence Imaging Agent market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include GE Healthcare, Bayer AG, Siemens Healthineers, Bracco Imaging S.p.A., Guerbet Group, Lantheus Medical Imaging, Thermo Fisher Scientific, PerkinElmer, Inc., Akorn, Inc., Nanopet Pharma GmbH, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Medical Fluorescence Imaging Agent market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Medical Fluorescence Imaging Agent Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Medical Fluorescence Imaging Agent Market, Segmentation by Type:

Non-Targeted (Passive) Agents

Targeted Molecular Probes

Activatable / Smart Probes

Global Medical Fluorescence Imaging Agent Market, Segmentation by Fluorophore Type:

Visible-Light Fluorophores

Near-Infrared (NIR) Fluorophores

Global Medical Fluorescence Imaging Agent Market, Segmentation by Imaging Wavelength:

Visible-Light Imaging (400-700 nm)

Near-Infrared I (700-900 nm)

Near-Infrared II (1000-1700 nm)

Global Medical Fluorescence Imaging Agent Market, Segmentation by Application:

Hospitals & Surgical Centers

Diagnostic Imaging Facilities

Research Institutions

Pharmaceutical R&D Laboratories

Companies Profiled:

GE Healthcare

Bayer AG

Siemens Healthineers

Bracco Imaging S.p.A.

Guerbet Group

Lantheus Medical Imaging

Thermo Fisher Scientific

PerkinElmer, Inc.

Akorn, Inc.

Nanopet Pharma GmbH

CMC Contrast AB

Daichi Sankyo

Spago Nanomedical AB

LI-COR Biosciences

BD (Becton, Dickinson and Company)

Merck KGaA

Key Questions Answered:

1. How big is the global Medical Fluorescence Imaging Agent market?
2. What is the demand of the global Medical Fluorescence Imaging Agent market?
3. What is the year over year growth of the global Medical Fluorescence Imaging Agent market?
4. What is the production and production value of the global Medical Fluorescence Imaging Agent market?
5. Who are the key producers in the global Medical Fluorescence Imaging Agent market?
6. What are the growth factors driving the market demand?

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