

Global Non-Invasive FFR System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-Invasive FFR System market size is expected to reach \$ 4162 million by 2032, rising at a market growth of 12.7% CAGR during the forecast period (2026-2032).

Non-Invasive FFR (Fractional Flow Reserve) System is a software-based medical technology that computes fractional flow reserve values from routine coronary CT angiography scans or invasive coronary angiograms without the need for a pressure wire or hyperemic agents. Using computational fluid dynamics, machine learning algorithms, or 3D reconstruction techniques, the system simulates blood flow and pressure gradients across coronary artery stenoses to generate a quantitative FFR value indicating the hemodynamic significance of coronary blockages. This enables physicians to determine whether a coronary lesion is functionally significant without performing invasive pressure wire measurements.

The upstream segment includes AI algorithm developers, computational fluid dynamics engine providers, cloud computing infrastructure, and medical imaging software toolkits. The midstream segment encompasses software development, regulatory approval (FDA, CE-MDR, NMPA), cloud-based platform deployment, and clinical validation performed by specialized AI medical imaging companies. Non-invasive FFR systems are categorized by imaging source into CT-derived FFR and angiography-derived FFR; by computational method into CFD-based, reduced-order algorithm, and machine learning/AI-based; by deployment into cloud-based and on-premise workstation. The downstream segment serves interventional cardiologists, radiologists, and cardiac imaging centers through per-analysis fees, software licensing, or subscription models. The industry maintains gross margins between 75% and 85%.

The global non-invasive FFR market is experiencing rapid growth, driven by increasing adoption of physiology-guided revascularization, favorable clinical evidence supporting FFR-guided PCI, and the need for cost-effective, risk-free diagnostic alternatives to invasive pressure wire measurements. The FAVOR III China trial demonstrated that QFR-guided revascularization resulted in a 35% risk reduction of major adverse cardiac events (MACE) compared with standard angiography guidance, with fewer stents used and reduced contrast and radiation exposure .

A notable trend reshaping the market is the shift toward AI-powered computational methods. Traditional 3D-CFD approaches require significant computational resources and processing time (1-4 hours). New machine learning-based solutions can compute results in minutes directly on local workstations or via cloud platforms, enabling same-day results and expanding clinical utility in outpatient settings. OCT-based FFR (Optical Flow Ratio, OFR) has demonstrated excellent diagnostic accuracy (AUC 97%) for predicting invasive FFR ischemic values, superior to angiography-based QFR .

Another significant development is the expansion of regulatory approvals and clinical indications. Multiple non-invasive FFR technologies have received global regulatory clearances: HeartFlow FFRCT (FDA 2014), KeYa CT-FFR (NMPA 2020, CE 2018, FDA 2022), RuiXin-FFR (MDR 2023, NMPA 2021), uCT-FFR (NMPA 2024), and Shukun-FFR (NMPA 2023) . The integration of plaque analysis and 3D vessel reconstruction is expanding clinical utility beyond ischemia detection to support primary and secondary prevention strategies.

This report studies the global Non-Invasive FFR System demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Non-Invasive FFR System, 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 Non-Invasive FFR System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Non-Invasive FFR System total market, 2021-2032, (USD Million)

Global Non-Invasive FFR System total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Non-Invasive FFR System total market, key domestic companies, and share, (USD Million)

Global Non-Invasive FFR System revenue by player, revenue and market share
2021-2026, (USD Million)

Global Non-Invasive FFR System total market by Type, CAGR, 2021-2032, (USD
Million)

Global Non-Invasive FFR System total market by Application, CAGR, 2021-2032, (USD
Million)

This report profiles major players in the global Non-Invasive FFR System market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Abbott Laboratories, Boston Scientific Corporation, Bracco S.p.A., Opsens Inc., Philips N.V., HeartFlow, Inc., CathWorks, Medis Medical Imaging System B.V., Pie Medical Imaging B.V., Canon Medical Systems Corporation, 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 Non-Invasive FFR System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Non-Invasive FFR System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-Invasive FFR System Market, Segmentation by Type:

FFRct

FFRangio

FFRivus/oct

Global Non-Invasive FFR System Market, Segmentation by Turnaround Time:

Real-Time (

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