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Fluorescence Guided Surgery Systems Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2024 – 2032

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Abstracts

The Global Fluorescence Guided Surgery Systems Market reached a valuation of USD 101.3 million in 2023 and is projected to grow at a CAGR of 14.1% from 2024 to 2032. FGS systems enhance surgical procedures by providing real-time imaging that differentiates tissues with fluorescent dyes, supporting more precise and effective surgeries.

Government initiatives focused on enhancing surgical infrastructure are driving significant demand for fluorescence-guided surgery (FGS) systems. These initiatives typically involve investments in advanced medical technologies, facility upgrades, and encouraging the use of innovative tools that improve surgical precision and outcomes. The grant supports OnLume's development of its FGS system, aiming to refine the device for improved intraoperative visualization of blood vessels and small lymphatic tissues, ultimately enhancing surgical accuracy and patient results.

The market is categorized by type into VS3 Iridium systems, SPY systems, PDE systems, and others. In 2023, the SPY system segment led with a market share of 38.1% and is expected to grow at a 15% CAGR. Known for its advanced imaging and precision, the SPY system uses ICG fluorescence imaging to visualize blood flow and tissue perfusion essential for enhancing surgical accuracy by enabling surgeons to assess tissue viability and make informed decisions in real-time.

In terms of application, the market is divided into laparoscopic/endoscopic surgery and open surgery. Open surgery held the largest share in 2023 at 54.2%, largely due to its role in complex, extensive procedures. FGS systems are particularly beneficial in open surgeries, where they enable detailed visualization of tumors and adjacent tissues,

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facilitating precise removal of malignant cells and minimizing the risk of residual disease.

The U.S. dominated the North American FGS market, generating USD 38.4 million in revenue in 2023. As a hub for medical technology innovation, the U.S. leads in growth of FGS systems with advanced imaging and new fluorescent agents. The high prevalence of cancer further drives demand for FGS, as surgeons prioritize techniques that enhance outcomes in challenging surgeries.

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