

# **Radiology AI Market by Offering (On-Device, SaaS), Function (Triage, Workflow, CDSS, Acquisition, Processing, Reporting), Modality (CT, MRI, X-ray), Indication (Onco, Cardio, Neuro), End User (Hospital, Imaging Center), Region - Global Forecast to 2030**

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## **Abstracts**

The radiology AI market is projected to reach USD 2.27 billion by 2030 from USD 0.76 billion in 2025, at a CAGR of 24.5%. The growth is fueled by the increasing adoption of AI-driven diagnostic tools for early cancer detection, lesion segmentation, and predictive treatment planning, which enhance diagnostic accuracy and reduce radiologist workload. The expanding application of these solutions in oncology, neuroimaging, and cardiovascular imaging is significantly boosting demand for intelligent AI platforms capable of delivering real-time insights, personalized diagnostics, and workflow optimization, creating a high-value opportunity in the healthcare technology landscape.

The workflow optimization segment is expected to witness significant market share during the forecast period.

Based on the function, the radiology AI market is segmented into screening & triage, diagnostic imaging & interpretation (image acquisition, reconstruction & enhancement, image processing, analysis & detection, clinical decision support, others), treatment planning & intervention support (dose planning & optimization, surgical planning & guidance, image-based segmentation & anatomical modeling, others), monitoring & follow-up, reporting & documentation, workflow optimization, research & clinical development, and others. Workflow optimization is projected to record the fastest CAGR in the radiology AI market, driven by its strong economic and operational impact across imaging departments. With global radiologist shortages and rising imaging volumes, health systems are prioritizing AI that enhances productivity through intelligent worklist

orchestration and automated case routing, as well as real-time modality utilization and turnaround-time reduction. These solutions streamline communication between technologists and radiologists, reduce the need for repeat scans, facilitate protocol standardization, and help eliminate manual administrative tasks. As hospitals increasingly shift toward value-based care, workflow AI directly supports cost containment, faster patient throughput, and an improved patient experience, making it a key investment area over the forecast period.

The software/SaaS segment is expected to have the largest share in 2025 in the radiology AI market.

By offering, the software/SaaS solutions segment is expected to hold the largest market share in 2025, primarily because they are easier to deploy, update, and scale across multiple imaging modalities. These platforms seamlessly integrate with existing Picture Archiving and Communication Systems (PACS), Radiology Information Systems (RIS), and Electronic Health Record (EHR) systems, enabling radiologists to access AI insights directly within their routine workflows without requiring major infrastructure changes. Cloud-based architectures enhance accessibility, support continuous model improvement, and lower upfront capital expenditure.

Additionally, software vendors leverage subscription and usage-based pricing, making adoption budget-friendly while driving strong recurring revenue. Growing regulatory approvals for diagnostic AI tools, along with strong use cases in oncology, neurology, and cardiology, further accelerate the dominance of this technology in the market.

The North America region accounted for a substantial share of the radiology AI market in 2025.

The North American region accounted for a substantial share of the radiology AI market in 2025, driven by significant investments in healthcare infrastructure, the adoption of advanced technology, and high demand for imaging services. The US, in particular, has seen widespread integration of AI into radiology workflows, supported by federal incentives for digital health adoption and regulatory approvals for AI-powered diagnostic tools. In addition, the growing prevalence of chronic diseases such as cancer, cardiovascular disorders, and neurological conditions has increased the demand for advanced imaging solutions, fueling the adoption of AI algorithms for image analysis, triage, and workflow optimization. For instance, in April 2025, according to the NIHCM Foundation, chronic diseases continue to pose a major burden on the US healthcare system, accounting for approximately 90% of the USD 4.5 trillion spent on healthcare in

2022, affecting around 60% of people in the US with multiple chronic conditions, thus driving high costs and complex care needs.

Robust investment from both private and public sectors, along with a high concentration of AI startups and established technology companies, further reinforced North American market leadership. Companies such as Aidoc (US), Enlitic, Inc. (US), and GE HealthCare (US) are actively developing AI-enabled platforms for CT, MRI, X-ray, and PET imaging, enhancing diagnostic accuracy and operational efficiency.

However, challenges such as data privacy concerns under HIPAA and clinician hesitancy to fully adopt AI tools remain. Despite these hurdles, the region continues to lead the global radiology AI market due to a combination of advanced healthcare infrastructure, favorable reimbursement policies, high R&D investment, and early adoption of innovative AI technologies.

These factors collectively reinforce North America's leadership in the radiology AI market.

### **The breakdown of primary participants is as mentioned below:**

By Company Type - Tier 1: 45%, Tier 2: 30%, and Tier 3: 25%

By Designation – C Level: 40%, Director Level: 30%, and Others: 30%

By Region - North America: 40%, Europe: 30%, Asia Pacific: 25%, Latin America: 3%, Middle East & Africa: 2%

### **Key Players in the Radiology AI Market**

The key players functioning in the radiology AI market include Siemens Healthineers AG (Germany), Microsoft (US), Koninklijke Philips N.V. (Netherlands), GE HealthCare (US), Fujifilm Holdings Corporation (Japan), Canon Medical Systems Corporation (Japan), Merative (US), DeepHealth (RadNet, Inc.) (US), Shanghai United Imaging Healthcare Co., LTD (China), Hologic, Inc. (US), and Enlitic, Inc. (US).

### **Research Coverage:**

The report analyses the radiology AI market. It aims to estimate the market size and

*Radiology AI Market by Offering (On-Device, SaaS), Function (Triage, Workflow, CDSS, Acquisition, Processing,...*

future growth potential of various market segments based on offering, function, modality, indication, end user, and region. The report also provides a competitive analysis of the key players in this market, along with their company profiles, product offerings, recent developments, and key market strategies.

## **Reasons to Buy the Report**

This report will help established firms and new entrants/smaller firms gauge the market's pulse, which, in turn, will help them garner a greater share of the market. Firms purchasing the report could use one or a combination of the following strategies to strengthen their positions in the market.

This report provides insights into:

Analysis of key drivers: Drivers (increasing medical imaging volumes, rising demand for AI solutions to alleviate radiologist workload, increase in regulatory clarity, accelerated approvals and government support, growing demand for AI-driven radiological image processing, growing funding for AI-focused startups, and rising collaborations with AI, tech, and analytics solution providers, Restraints (high implementation costs and ROI uncertainty, regulatory fragmentation across regions, and data quality and label scarcity for rarer indications), Opportunities (Growing demand for platform, multi-modal data, and OEM integration [PACS/EHR/marketplaces], untapped growth potential in emerging healthcare markets, expansion of preventive care and population health management, and expansion of portable or handheld devices with AI integration), Challenges (integration challenges with legacy radiology systems, limited clinician trust and explainability demands, and concerns over data privacy and security) influencing the growth of the radiology AI market.

Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and new product launches in the radiology AI market

Market Development: Comprehensive information on the lucrative emerging markets, by offering, function, modality, indication, end user, and region.

Market Diversification: Exhaustive information about the product portfolios, growing geographies, recent developments, and investments in the radiology AI market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, and capabilities of the leading players in the radiology AI market such as Siemens Healthineers AG (Germany), Microsoft (US), Koninklijke Philips N.V. (Netherlands), GE HealthCare (US), Fujifilm Holdings Corporation (Japan), Canon Medical Systems Corporation (Japan), Merative (US), DeepHealth (RadNet, Inc.) (US), Shanghai United Imaging Healthcare Co., LTD (China), Hologic, Inc. (US), and Enlitic, Inc. (US).

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