

Image Guided Surgery Devices Market Outlook 2025-2034: Market Share, and Growth Analysis By Product (Image Guided Surgery Devices, Image Guided Surgery Software), By Device Type (CT, Ultrasound, MRI, X-Ray, Fluoroscopy, Endoscopes, PET, SPECT,), By Application, By End User

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Abstracts

The Image Guided Surgery Devices Market is valued at USD 8.4 billion in 2025 and is projected to grow at a CAGR of 9.2% to reach USD 18.6 billion by 2034. The Image Guided Surgery (IGS) Devices Market is evolving rapidly as precision, minimally invasive procedures, and real-time visual navigation become essential components of modern surgical practices. IGS systems use advanced imaging modalities such as CT, MRI, ultrasound, and fluoroscopy in conjunction with navigation software to guide surgical instruments with high accuracy. These technologies are widely used in neurosurgery, orthopedics, ENT, cardiovascular procedures, and oncology. Surgeons benefit from enhanced visualization, reduced operative errors, and improved outcomes, while patients experience shorter recovery times and fewer complications. The increasing demand for advanced surgical interventions, rising prevalence of chronic diseases, and technological breakthroughs in imaging and robotics are driving the expansion of the global IGS devices market. The IGS devices market witnessed strong adoption across hospitals and specialty surgical centers, particularly for complex procedures requiring real-time anatomical guidance. Key manufacturers introduced compact, hybrid systems combining multiple imaging modalities into a single platform, enabling intraoperative updates and adaptive navigation. Augmented reality (AR) and artificial intelligence (AI) features were integrated into surgical displays to assist with decision-making and reduce cognitive load on surgeons. The orthopedic and spinal surgery segments saw the highest growth, driven by demand for precision in implant

positioning. Training programs and simulation tools were expanded to help surgeons adopt image-guided techniques. Meanwhile, portable IGS units gained popularity in emerging markets with limited access to large imaging infrastructure. The image guided surgery devices market is set to become more intelligent, personalized, and robotic-integrated. Next-generation IGS platforms will include AI-driven anatomical mapping, robotic arm synchronization, and cloud-based surgical planning tools. Precision oncology and personalized implants will rely heavily on image-guided procedures for accuracy. Interoperability with electronic health records (EHRs) and surgical robots will allow for seamless data exchange and decision support. As reimbursement models increasingly prioritize outcomes over volume, healthcare providers will invest more in technologies that improve surgical precision and reduce readmission rates. With growing demand for same-day surgery and outpatient procedures, compact and cost-effective IGS solutions will expand into ambulatory surgical centers globally.

Key Insights Image Guided Surgery Devices Market

Integration of AR and AI technologies is enhancing intraoperative visualization, improving precision, and reducing surgical risks.

Portable and compact IGS systems are expanding access to advanced surgery in smaller hospitals and outpatient centers.

Hybrid platforms that combine multiple imaging modalities are streamlining workflow and improving real-time anatomical mapping.

Growing use of IGS in orthopedic, spinal, and ENT procedures is driving specialty-specific innovation in navigation tools.

AI-assisted preoperative planning and simulation is becoming a standard feature in advanced image-guided systems.

Increasing demand for minimally invasive surgeries is boosting the need for precise, real-time image-guided interventions.

Technological advancements in imaging, robotics, and navigation software are enhancing device accuracy and usability.

Rising prevalence of chronic diseases such as cancer and orthopedic disorders

is increasing surgical case volumes globally.

Favorable reimbursement policies and growing investments in surgical infrastructure are supporting adoption of IGS systems.

High initial costs and maintenance expenses of IGS devices limit adoption in low- and middle-income healthcare settings.

Complex integration with hospital IT systems and steep learning curves pose barriers to efficient implementation and usage.

Image Guided Surgery Devices Market Segmentation

By Product

Image Guided Surgery Devices

Image Guided Surgery Software

By Device Type

CT

Ultrasound

MRI

X-Ray

Fluoroscopy

Endoscopes

PET

SPECT,

By Application

Cardiac Surgery

Neurosurgery

Orthopedic Surgery

Urology

Oncology Surgery

Gastroenterology

Other Applications

By End User

Hospitals

Ambulatory Surgical Centers

Specialty Clinics

Research And Academic Institutions

Key Companies Analysed

General Electric Company

Medtronic Plc.

Olympus Corporation

Siemens Healthineers

Koninklijke Philips N.V.

Brainlab AG

Karl Storz Gmbh & Co. KG

Stryker Corporation

Varian Medical Systems Inc.

Hitachi Medical Corporation

Analogic Corporation

Zimmer Biomet Holdings Inc.

Smith and Nephew Plc

FUJIFILM Holdings Corporation

Shimadzu Corporation

Intuitive Surgical Inc.

Canon Medical Systems Corporation

Synaptive Medical

Sienna Cancer Diagnostics

Accuray Incorporated

ClaroNav Inc.

PathAI

Merge Healthcare Inc.

CureMetric Health Tech

Mirada Medical Ltd.

Navigation Sciences

Elekta AB

XION GmbH

Northern Digital Inc.

Fiagon AG Medical Technologies

Image Guided Surgery Devices Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

Image Guided Surgery Devices Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — Image Guided Surgery Devices market data and outlook to 2034

United States

Canada

Mexico

Europe — Image Guided Surgery Devices market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Image Guided Surgery Devices market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Image Guided Surgery Devices market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Image Guided Surgery Devices market data and outlook to 2034

Brazil

Argentina

Chile

Peru

** We can include data and analysis of additional countries on demand.*

Research Methodology

This study combines primary inputs from industry experts across the Image Guided Surgery Devices value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning,

Image Guided Surgery Devices Market Outlook 2025-2034: Market Share, and Growth Analysis By Product (Image Gui...

are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the Image Guided Surgery Devices industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the Image Guided Surgery Devices Market Report

Global Image Guided Surgery Devices market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Image Guided Surgery Devices trade, costs, and supply chains

Image Guided Surgery Devices market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Image Guided Surgery Devices market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Image Guided Surgery Devices market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and Image Guided Surgery Devices supply chain analysis

Image Guided Surgery Devices trade analysis, Image Guided Surgery Devices market price analysis, and Image Guided Surgery Devices supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Image Guided Surgery Devices market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

** The updated report will be delivered within 3 working days*

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