

Near Infrared Imaging Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Devices, Reagents), By Application (Cancer Surgeries, Gastrointestinal Surgeries, Cardiovascular Surgeries, Plastic/Reconstructive Surgeries, Other), By End-use (Hospitals & Clinics, Pharmaceutical & Biotechnology Companies, Research Laboratories), By Region, By Competition, 2018-2028

<https://marketpublishers.com/r/N21E13D88374EN.html>

Date: October 2023

Pages: 185

Price: US\$ 4,900.00 (Single User License)

ID: N21E13D88374EN

Abstracts

Global Near Infrared Imaging Market has valued at USD 2.4 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.1% through 2028. The Global Near-Infrared Imaging Market is experiencing substantial growth, primarily driven by its versatility and wide-ranging applications in various industries. Near-infrared imaging technology utilizes the near-infrared spectrum of light to capture images and provide valuable insights. In the medical field, it has revolutionized diagnostics and surgical procedures by offering non-invasive and real-time visualization of tissues, aiding in the early detection of diseases like cancer and enhancing surgical precision. This has led to an increased adoption of near-infrared imaging systems in healthcare facilities worldwide.

Furthermore, the market has witnessed significant expansion into industrial and agricultural sectors. Near-infrared imaging's ability to analyze materials and substances, such as food quality assessment, moisture detection, and chemical composition analysis, has made it indispensable in ensuring product quality and safety. Additionally, it plays a crucial role in environmental monitoring and remote sensing applications,

contributing to its growing relevance in research and development. The Global Near-Infrared Imaging Market is characterized by continuous technological advancements, including the integration of artificial intelligence and machine learning for data analysis, further enhancing its capabilities. With a broadening scope of applications, increasing awareness of its benefits, and ongoing innovation, the near-infrared imaging market is poised for continued growth in the coming years, attracting investments and shaping industries across the globe.

Key Market Drivers

Enhanced Imaging Capabilities

AI-enabled near-infrared imaging is revolutionizing the medical imaging industry by providing enhanced visualization and diagnostic capabilities. Near-infrared imaging utilizes AI algorithms to analyze and interpret near-infrared light signals emitted by tissues, allowing for non-invasive and real-time imaging of deep tissues. This technology enables healthcare professionals to visualize anatomical structures, detect abnormalities, and monitor physiological processes with high accuracy and precision. By leveraging AI algorithms, near-infrared imaging can provide detailed insights into tissue composition, blood flow, oxygenation levels, and metabolic activity, facilitating early detection and diagnosis of various medical conditions. The enhanced imaging capabilities offered by AI-enabled near-infrared imaging empower healthcare professionals to make informed decisions, improve patient outcomes, and optimize treatment strategies.

Improved Diagnostic Accuracy

AI-enabled near-infrared imaging significantly improves diagnostic accuracy by leveraging machine learning algorithms to analyze complex data patterns and identify subtle abnormalities that may be missed by traditional imaging techniques. By training on large datasets of near-infrared images and corresponding clinical data, AI algorithms can learn to recognize patterns associated with specific medical conditions. This enables near-infrared imaging to assist in the early detection and diagnosis of diseases such as cancer, cardiovascular disorders, and neurological conditions. The ability of AI algorithms to analyze near-infrared images in real-time and provide immediate feedback to healthcare professionals enhances the diagnostic process, reduces the risk of misdiagnosis, and improves patient outcomes. Moreover, AI-enabled near-infrared imaging can be used as a complementary tool to other imaging modalities, such as MRI and CT scans, further enhancing diagnostic accuracy and providing a more

comprehensive assessment of patients' conditions.

Non-Invasive and Real-Time Monitoring

AI-enabled near-infrared imaging offers non-invasive and real-time monitoring of physiological processes, making it a valuable tool in various medical fields. By analyzing near-infrared signals emitted by tissues, AI algorithms can provide continuous monitoring of parameters such as tissue oxygenation, blood flow, and metabolic activity. This real-time monitoring capability is particularly beneficial in critical care settings, where prompt detection of changes in tissue perfusion and oxygenation is crucial for patient management. AI-enabled near-infrared imaging can also be used for intraoperative monitoring, allowing surgeons to assess tissue viability and perfusion during surgical procedures. The non-invasive nature of near-infrared imaging reduces patient discomfort, eliminates the need for contrast agents or ionizing radiation, and minimizes the risk of complications associated with invasive procedures. The real-time monitoring provided by AI-enabled near-infrared imaging enables healthcare professionals to make timely interventions, optimize treatment strategies, and improve patient outcomes.

Personalized Medicine and Treatment Optimization

AI-enabled near-infrared imaging plays a pivotal role in personalized medicine by providing valuable insights into individual patients' conditions and optimizing treatment strategies accordingly. By analyzing near-infrared images and integrating them with patient-specific data, such as medical history, genetic information, and treatment response, AI algorithms can generate personalized diagnostic and therapeutic recommendations. This personalized approach enables healthcare professionals to tailor treatment plans to each patient's unique characteristics, improving treatment outcomes and minimizing adverse effects. AI-enabled near-infrared imaging can also assist in treatment monitoring and response assessment, allowing healthcare professionals to adjust treatment regimens based on real-time feedback. The integration of AI-enabled near-infrared imaging with electronic health records and clinical decision support systems further enhances the delivery of personalized medicine, enabling seamless integration of imaging data into the overall patient care workflow.

Advancements in Imaging Technology

AI-enabled near-infrared imaging is driving advancements in imaging technology, leading to the development of more compact, portable, and cost-effective imaging

devices. Traditional near-infrared imaging systems were bulky and expensive, limiting their accessibility and widespread adoption. However, with the integration of AI algorithms, near-infrared imaging devices can be miniaturized and optimized for point-of-care applications. This portability and affordability enable near-infrared imaging to be used in various healthcare settings, including resource-limited environments and remote areas. The advancements in imaging technology driven by AI-enabled near-infrared imaging expand access to high-quality medical imaging, improve healthcare delivery, and contribute to the democratization of healthcare.

Key Market Challenges

Limited Awareness and Understanding

The global near-infrared imaging market faces a significant challenge in terms of limited awareness and understanding among organizations regarding the importance and advantages of adopting near-infrared imaging solutions. Many businesses, particularly in smaller enterprises, may not fully grasp the potential benefits and applications of near-infrared imaging technology. This lack of awareness can lead to hesitation in investing in near-infrared imaging solutions, leaving organizations unaware of the potential for improved diagnostics, enhanced visualization, and better patient outcomes. Addressing this challenge requires comprehensive educational initiatives to highlight the critical role that near-infrared imaging plays in various fields such as medical imaging, agriculture, and industrial applications. Organizations need to recognize that near-infrared imaging can provide valuable insights and enable more accurate decision-making in a wide range of industries.

Complexity and Integration Issues

The implementation and integration of near-infrared imaging solutions can pose complex challenges for organizations, particularly those with limited technical expertise or resources. Configuring near-infrared imaging systems effectively and integrating them with existing imaging workflows and equipment can be technically demanding. Compatibility issues may arise during integration, leading to delays and suboptimal performance. To address these challenges, it is crucial to simplify the deployment and management of near-infrared imaging solutions. User-friendly interfaces and intuitive configuration options should be provided to streamline setup and customization. Additionally, organizations should have access to comprehensive support and guidance, including documentation, training, and technical experts who can assist with integration and troubleshooting. Simplifying these aspects of near-infrared imaging

implementation can lead to more efficient processes and improved imaging outcomes.

Standardization and Regulatory Compliance

The global near-infrared imaging market faces challenges related to standardization and regulatory compliance. As near-infrared imaging technology advances and becomes more widely adopted, there is a need for standardized protocols and guidelines to ensure consistent and reliable results across different devices and applications. Lack of standardization can lead to variations in image quality, data interpretation, and diagnostic accuracy. Additionally, regulatory compliance requirements can pose challenges for manufacturers and healthcare providers, as they need to navigate complex regulatory frameworks to ensure the safety and efficacy of near-infrared imaging devices and applications. Overcoming these challenges requires collaboration among industry stakeholders, regulatory bodies, and standardization organizations to develop and implement guidelines that promote interoperability, accuracy, and patient safety.

Data Security and Privacy Concerns

The widespread adoption of near-infrared imaging technology raises concerns about data security and privacy. Near-infrared imaging involves capturing and processing sensitive data, including medical images and personal information. Protecting this data from unauthorized access, breaches, and misuse is crucial to maintain patient trust and comply with data protection regulations. Organizations operating in the near-infrared imaging market need to implement robust security measures, including encryption, access controls, and secure data storage practices. Additionally, they should adhere to relevant data protection regulations and industry best practices to ensure the privacy and confidentiality of patient information. Addressing data security and privacy concerns is essential to foster trust and confidence in near-infrared imaging technology among patients, healthcare providers, and other stakeholders.

Continued Technological Advancements

The near-infrared imaging market is characterized by rapid technological advancements, which present both opportunities and challenges. On one hand, these advancements enable improved image quality, enhanced functionality, and expanded applications of near-infrared imaging. On the other hand, organizations need to keep pace with these advancements and invest in research and development to remain competitive. Staying up-to-date with the latest technological trends and innovations can

be challenging, particularly for smaller companies with limited resources. To overcome this challenge, collaboration between industry players, academia, and research institutions is crucial. Sharing knowledge, fostering innovation, and investing in research and development can drive continuous improvement in near-infrared imaging technology, leading to better outcomes for patients and a more robust market.

Key Market Trends

Rise in Demand for Non-Invasive Diagnostic Techniques

The global market for near-infrared imaging is witnessing a rise in demand due to the increasing adoption of non-invasive diagnostic techniques. Near-infrared imaging technology allows healthcare professionals to visualize and analyze tissues and organs without the need for invasive procedures. This technology utilizes near-infrared light to penetrate the skin and provide real-time imaging of internal structures. The non-invasive nature of near-infrared imaging makes it a preferred choice for various medical applications, including cancer detection, brain imaging, and cardiovascular assessment. As the demand for safer and more patient-friendly diagnostic techniques continues to grow, the near-infrared imaging market is experiencing significant expansion.

Advancements in Imaging Technologies

The near-infrared imaging market is benefiting from continuous advancements in imaging technologies. Manufacturers are investing in research and development activities to enhance the performance and capabilities of near-infrared imaging devices. These advancements include improvements in image resolution, sensitivity, and depth penetration, allowing for more accurate and detailed visualization of tissues and organs. Additionally, the integration of advanced image processing algorithms and artificial intelligence (AI) techniques is further enhancing the diagnostic accuracy of near-infrared imaging systems. These technological advancements are driving the adoption of near-infrared imaging in various medical specialties, such as oncology, neurology, and cardiology.

Growing Application in Oncology

Oncology is one of the key application areas driving the growth of the global near-infrared imaging market. Near-infrared imaging techniques are widely used in cancer diagnosis, surgical guidance, and monitoring of treatment response. Near-infrared fluorescence imaging, a specific application of near-infrared imaging, enables the

visualization of tumor margins and lymph nodes during surgery, aiding surgeons in achieving more precise tumor resection and reducing the risk of recurrence. The ability of near-infrared imaging to provide real-time feedback during surgical procedures is revolutionizing cancer treatment and improving patient outcomes. As the incidence of cancer continues to rise globally, the demand for near-infrared imaging in oncology is expected to witness significant growth.

Increasing Adoption in Pharmaceutical Research and Development

The near-infrared imaging market is also witnessing increasing adoption in pharmaceutical research and development. Near-infrared imaging techniques are being utilized in preclinical and clinical studies to assess drug distribution, pharmacokinetics, and therapeutic efficacy. By providing real-time visualization of drug distribution within tissues, near-infrared imaging enables researchers to optimize drug formulations and dosing regimens. This technology also facilitates the evaluation of drug-target interactions and the monitoring of treatment response. The integration of near-infrared imaging with other imaging modalities, such as positron emission tomography (PET) and magnetic resonance imaging (MRI), is further expanding its applications in pharmaceutical research and development.

Shift towards Portable and Handheld Devices

The global near-infrared imaging market is experiencing a shift towards portable and handheld devices. Traditional near-infrared imaging systems were bulky and limited to laboratory or hospital settings. However, advancements in miniaturization technologies have led to the development of compact and portable near-infrared imaging devices. These portable devices offer greater flexibility and convenience, allowing healthcare professionals to perform near-infrared imaging at the point of care. The portability of these devices is particularly beneficial in resource-limited settings and remote areas where access to advanced medical facilities is limited. The shift towards portable and handheld near-infrared imaging devices is expected to drive market growth, especially in emerging economies.

Integration of Artificial Intelligence and Machine Learning

The integration of artificial intelligence (AI) and machine learning (ML) technologies into near-infrared imaging systems is a significant trend in the market. AI and ML algorithms can analyze large volumes of imaging data and assist in the interpretation and diagnosis of near-infrared images. These technologies enable automated image

analysis, pattern recognition, and predictive modeling, enhancing the efficiency and accuracy of near-infrared imaging-based diagnostics. The integration of AI and ML capabilities also enables real-time decision support, aiding healthcare professionals in making more informed clinical decisions. Near-infrared imaging vendors are investing in AI and ML to further improve the diagnostic capabilities of their systems and provide personalized patient care.

Segmental Insights

Product Insights

The reagents segment dominated the market for near infrared imaging and accounted for the largest revenue share of 56.6% in 2022. The segment is expected to witness a significant growth over the forecast period as reagents offer several advantages over traditional visible light dyes including high sensitivity and specific detection in biological systems. Reagents are sub-categorized as Indocyanine Green (ICG) and other reagents. The reagents segment is expected to grow considerably during the forecast period owing to the benefits offered by ICG. Indocyanine green offers real-time angiographic images during brain tumor or vascular surgery. Moreover, it is increasingly being used for spine surgery. Hence, growing applications of ICG along with its advantages are the major drivers of the segment.

The novel point-of-care near infrared imaging modalities provide the sensitivity of nuclear medicine techniques and offer radiation-free and noninvasive imaging. The device segment is expected to witness lucrative growth owing to the launch and approval of near infrared imaging systems for use in surgical procedures. The segment is further classified into near-infrared fluorescence imaging systems and near-infrared fluorescence and bioluminescence imaging systems.

End-use Insights

The hospitals and clinics segment captured the largest revenue share of over 45.3% in 2022 and is expected to grow at a fastest rate during the forecast period. This growth is owing to an increase in the number of admissions of cancer patients in clinics and hospitals and well-established healthcare facilities in developed countries. Near infrared technologies are widely used in hospitals and clinics for detection of bedsores to prevent surgical errors. Laparoscopic devices integrated with near infrared sensors help surgeons to avoid accidental cutting of blood vessels. The adoption of these devices helps in reducing surgical errors and minimizing the duration of hospital stay and

healthcare costs for patients. The increasing patient demand for minimally invasive and efficient surgical methods is expected to boost the demand for near infrared products.

The pharmaceutical and biotechnology companies' segment is also anticipated to witness a significant CAGR over the forecast period. Near infrared imaging is used in pharmaceutical companies to measure the critical material attributes of a product. They are used in pharmaceutical and biotechnology companies for identification of raw materials, verification of the quality of lyophilized materials, monitoring coating and content of tablets, monitoring fermentation and cell culture, and various in-line and on-line process monitoring.

Application Insights

The preclinical imaging segment dominated the market for near infrared imaging and held the largest revenue share of 34.90% in 2022. The cancer surgeries segment is expected to witness a CAGR of 4.9% during the forecast period owing to the increasing prevalence of cancer on a global scale. For instance, according to the International Agency for Research on Cancer in 2020, there were about 19,292,789 new cancer cases globally, the same source states that the number is expected to reach 50,550,287 by 2025.

Near-infrared (NIR) reagents are used in preclinical imaging research to study diseases and conditions such as cancer, inflammation, infection, vascular, and others. The development of advanced NIR reagents with improved fluorescence, tissue penetration, and targeted fluorescence capabilities promotes its adoption into preclinical research. For instance, COX 2 probe- a targeted NIR dye developed by PerkinElmer Inc. detects cyclooxygenase-2, produced in early-stage cancer. Such dyes are used in faster clinical development of oncology drugs and diagnostic devices.

Neurological complications are common during cardiovascular procedures such as coronary surgery and valve replacement. Therefore, it is important to monitor the cerebral oxygenation level during cardiac surgeries to improve surgical outcomes. The strong impetus of implementing measures to monitor cerebral desaturation during cardiac surgery is a key factor promoting the adoption of NIR imaging.

Regional Insights

North America dominated the market for near infrared imaging and accounted for the largest revenue share of 40.49% in 2022 and is expected to witness a growth rate of

over 4.0% over the forecast period. This growth is owing to the high disposable income of consumers, speedy adoption of technologically advanced medical devices, and diagnostic techniques. A large number of cancer cases reported in the country are expected to boost the market in the U.S. According to International Agency for Research on Cancer, around 2,281,658 new cancer cases were identified in 2020 in the U.S. In addition, rise in the number of reconstructive and cosmetic surgeries in the country owing to increased spending and rising awareness regarding early diagnosis is expected to create robust growth opportunities.

In Asia Pacific, the market for near infrared imaging is anticipated to witness the fastest CAGR over the forecast period. The presence of developing countries such as China, India, and Japan is anticipated to boost the growth of the market in the region. The presence of a huge population base with low per capita income in the Asia Pacific region has led to high demand for affordable treatment options. Multinational companies are keen to invest in developing countries, such as Japan, India, South Korea, and more. Thus, many market players are entering into strategic alliances with local players. This is anticipated to augment the near infrared imaging market growth.

Key Market Players

Quest Medical Imaging B.V.

Stryker

KARL STORZ SE & Co. KG

Olympus

Hamamatsu Photonics K.K

Mizuho Medical Co, Ltd.

Shimadzu Corporation

Leica Microsystems

Medtronic (Visionsense)

PerkinElmer, Inc.

Carl Zeiss Meditec

Fluoptics

Report Scope:

In this report, the Global Near Infrared Imaging Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Near Infrared Imaging Market, By Product:

Devices

Reagents

Near Infrared Imaging Market, By Application:

Cancer Surgeries

Gastrointestinal Surgeries

Cardiovascular Surgeries

Plastic/Reconstructive Surgeries

Other

Near Infrared Imaging Market, By End- use Industry:

Government

BFSI

IT & Telecommunication

Energy & Utility

Others

Near Infrared Imaging Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Near Infrared Imaging Market.

Available Customizations:

Global Near Infrared Imaging market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. IMPACT OF COVID-19 ON GLOBAL NEAR INFRARED IMAGING MARKET

5. VOICE OF CUSTOMER

6. GLOBAL NEAR INFRARED IMAGING MARKET OVERVIEW

7. GLOBAL NEAR INFRARED IMAGING MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast

- 7.2.1. By Product (Devices, Reagents)
- 7.2.2. By Application (Cancer Surgeries, Gastrointestinal Surgeries, Cardiovascular Surgeries, Plastic/Reconstructive Surgeries, Other)
- 7.2.3. By End-use (Hospitals & Clinics, Pharmaceutical & Biotechnology Companies, Research Laboratories)
- 7.2.4. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)
- 7.3. By Company (2022)
- 7.4. Market Map

8. NORTH AMERICA NEAR INFRARED IMAGING MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Product
 - 8.2.2. By Application
 - 8.2.3. By End-use
 - 8.2.4. By Country
- 8.3. North America: Country Analysis
 - 8.3.1. United States Near Infrared Imaging Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product
 - 8.3.1.2.2. By Application
 - 8.3.1.2.3. By End-use
 - 8.3.2. Canada Near Infrared Imaging Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product
 - 8.3.2.2.2. By Application
 - 8.3.2.2.3. By End-use
 - 8.3.3. Mexico Near Infrared Imaging Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product

- 8.3.3.2.2. By Application
- 8.3.3.2.3. By End-use

9. EUROPE NEAR INFRARED IMAGING MARKET OUTLOOK

9.1. Market Size & Forecast

- 9.1.1. By Value

9.2. Market Share & Forecast

- 9.2.1. By Product
- 9.2.2. By Application
- 9.2.3. By End-use
- 9.2.4. By Country

9.3. Europe: Country Analysis

9.3.1. Germany Near Infrared Imaging Market Outlook

- 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
- 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product
 - 9.3.1.2.2. By Application
 - 9.3.1.2.3. By End-use

9.3.2. France Near Infrared Imaging Market Outlook

- 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
- 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product
 - 9.3.2.2.2. By Application
 - 9.3.2.2.3. By End-use

9.3.3. United Kingdom Near Infrared Imaging Market Outlook

- 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
- 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Product
 - 9.3.3.2.2. By Application
 - 9.3.3.2.3. By End-use

9.3.4. Italy Near Infrared Imaging Market Outlook

- 9.3.4.1. Market Size & Forecast
 - 9.3.4.1.1. By Value
- 9.3.4.2. Market Share & Forecast
 - 9.3.4.2.1. By Product

- 9.3.4.2.2. By Application
- 9.3.4.2.3. By End-use
- 9.3.5. Spain Near Infrared Imaging Market Outlook
 - 9.3.5.1. Market Size & Forecast
 - 9.3.5.1.1. By Value
 - 9.3.5.2. Market Share & Forecast
 - 9.3.5.2.1. By Product
 - 9.3.5.2.2. By Application
 - 9.3.5.2.3. By End-use
- 9.3.6. Belgium Near Infrared Imaging Market Outlook
 - 9.3.6.1. Market Size & Forecast
 - 9.3.6.1.1. By Value
 - 9.3.6.2. Market Share & Forecast
 - 9.3.6.2.1. By Product
 - 9.3.6.2.2. By Application
 - 9.3.6.2.3. By End-use

10. SOUTH AMERICA NEAR INFRARED IMAGING MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Product
 - 10.2.2. By Application
 - 10.2.3. By End-use
 - 10.2.4. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Near Infrared Imaging Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Product
 - 10.3.1.2.2. By Application
 - 10.3.1.2.3. By End-use
 - 10.3.2. Colombia Near Infrared Imaging Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Product

- 10.3.2.2.2. By Application
- 10.3.2.2.3. By End-use
- 10.3.3. Argentina Near Infrared Imaging Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Product
 - 10.3.3.2.2. By Application
 - 10.3.3.2.3. By End-use
- 10.3.4. Chile Near Infrared Imaging Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Product
 - 10.3.4.2.2. By Application
 - 10.3.4.2.3. By End-use
- 10.3.5. Peru Near Infrared Imaging Market Outlook
 - 10.3.5.1. Market Size & Forecast
 - 10.3.5.1.1. By Value
 - 10.3.5.2. Market Share & Forecast
 - 10.3.5.2.1. By Product
 - 10.3.5.2.2. By Application
 - 10.3.5.2.3. By End-use

11. MIDDLE EAST & AFRICA NEAR INFRARED IMAGING MARKET OUTLOOK

- 11.1. Market Size & Forecast
 - 11.1.1. By Value
- 11.2. Market Share & Forecast
 - 11.2.1. By Product
 - 11.2.2. By Application
 - 11.2.3. By End-use
 - 11.2.4. By Country
- 11.3. Middle East & Africa: Country Analysis
 - 11.3.1. Saudi Arabia Near Infrared Imaging Market Outlook
 - 11.3.1.1. Market Size & Forecast
 - 11.3.1.1.1. By Value
 - 11.3.1.2. Market Share & Forecast
 - 11.3.1.2.1. By Product

- 11.3.1.2.2. By Application
- 11.3.1.2.3. By End-use
- 11.3.2. UAE Near Infrared Imaging Market Outlook
 - 11.3.2.1. Market Size & Forecast
 - 11.3.2.1.1. By Value
 - 11.3.2.2. Market Share & Forecast
 - 11.3.2.2.1. By Product
 - 11.3.2.2.2. By Application
 - 11.3.2.2.3. By End-use
- 11.3.3. South Africa Near Infrared Imaging Market Outlook
 - 11.3.3.1. Market Size & Forecast
 - 11.3.3.1.1. By Value
 - 11.3.3.2. Market Share & Forecast
 - 11.3.3.2.1. By Product
 - 11.3.3.2.2. By Application
 - 11.3.3.2.3. By End-use
- 11.3.4. Turkey Near Infrared Imaging Market Outlook
 - 11.3.4.1. Market Size & Forecast
 - 11.3.4.1.1. By Value
 - 11.3.4.2. Market Share & Forecast
 - 11.3.4.2.1. By Product
 - 11.3.4.2.2. By Application
 - 11.3.4.2.3. By End-use
- 11.3.5. Israel Near Infrared Imaging Market Outlook
 - 11.3.5.1. Market Size & Forecast
 - 11.3.5.1.1. By Value
 - 11.3.5.2. Market Share & Forecast
 - 11.3.5.2.1. By Product
 - 11.3.5.2.2. By Application
 - 11.3.5.2.3. By End-use

12. ASIA PACIFIC NEAR INFRARED IMAGING MARKET OUTLOOK

- 12.1. Market Size & Forecast
 - 12.1.1. By Product
 - 12.1.2. By Application
 - 12.1.3. By End-use
 - 12.1.4. By Country
- 12.2. Asia-Pacific: Country Analysis

- 12.2.1. China Near Infrared Imaging Market Outlook
 - 12.2.1.1. Market Size & Forecast
 - 12.2.1.1.1. By Value
 - 12.2.1.2. Market Share & Forecast
 - 12.2.1.2.1. By Product
 - 12.2.1.2.2. By Application
 - 12.2.1.2.3. By End-use
- 12.2.2. India Near Infrared Imaging Market Outlook
 - 12.2.2.1. Market Size & Forecast
 - 12.2.2.1.1. By Value
 - 12.2.2.2. Market Share & Forecast
 - 12.2.2.2.1. By Product
 - 12.2.2.2.2. By Application
 - 12.2.2.2.3. By End-use
- 12.2.3. Japan Near Infrared Imaging Market Outlook
 - 12.2.3.1. Market Size & Forecast
 - 12.2.3.1.1. By Value
 - 12.2.3.2. Market Share & Forecast
 - 12.2.3.2.1. By Product
 - 12.2.3.2.2. By Application
 - 12.2.3.2.3. By End-use
- 12.2.4. South Korea Near Infrared Imaging Market Outlook
 - 12.2.4.1. Market Size & Forecast
 - 12.2.4.1.1. By Value
 - 12.2.4.2. Market Share & Forecast
 - 12.2.4.2.1. By Product
 - 12.2.4.2.2. By Application
 - 12.2.4.2.3. By End-use
- 12.2.5. Australia Near Infrared Imaging Market Outlook
 - 12.2.5.1. Market Size & Forecast
 - 12.2.5.1.1. By Value
 - 12.2.5.2. Market Share & Forecast
 - 12.2.5.2.1. By Product
 - 12.2.5.2.2. By Application
 - 12.2.5.2.3. By End-use
- 12.2.6. Indonesia Near Infrared Imaging Market Outlook
 - 12.2.6.1. Market Size & Forecast
 - 12.2.6.1.1. By Value
 - 12.2.6.2. Market Share & Forecast

- 12.2.6.2.1. By Product
- 12.2.6.2.2. By Application
- 12.2.6.2.3. By End-use
- 12.2.7. Vietnam Near Infrared Imaging Market Outlook
 - 12.2.7.1. Market Size & Forecast
 - 12.2.7.1.1. By Value
 - 12.2.7.2. Market Share & Forecast
 - 12.2.7.2.1. By Product
 - 12.2.7.2.2. By Application
 - 12.2.7.2.3. By End-use

13. MARKET DYNAMICS

- 13.1. Drivers
- 13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

- 15.1. Quest Medical Imaging B.V.
 - 15.1.1. Business Overview
 - 15.1.2. Key Revenue and Financials
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel/Key Contact Person
 - 15.1.5. Key Product/Services Offered
- 15.2. Stryker
 - 15.2.1. Business Overview
 - 15.2.2. Key Revenue and Financials
 - 15.2.3. Recent Developments
 - 15.2.4. Key Personnel/Key Contact Person
 - 15.2.5. Key Product/Services Offered
- 15.3. KARL STORZ SE & Co. KG
 - 15.3.1. Business Overview
 - 15.3.2. Key Revenue and Financials
 - 15.3.3. Recent Developments
 - 15.3.4. Key Personnel/Key Contact Person
 - 15.3.5. Key Product/Services Offered
- 15.4. Olympus

- 15.4.1. Business Overview
- 15.4.2. Key Revenue and Financials
- 15.4.3. Recent Developments
- 15.4.4. Key Personnel/Key Contact Person
- 15.4.5. Key Product/Services Offered
- 15.5. Hamamatsu Photonics K.K.
 - 15.5.1. Business Overview
 - 15.5.2. Key Revenue and Financials
 - 15.5.3. Recent Developments
 - 15.5.4. Key Personnel/Key Contact Person
 - 15.5.5. Key Product/Services Offered
- 15.6. Mizuho Medical Co, Ltd.
 - 15.6.1. Business Overview
 - 15.6.2. Key Revenue and Financials
 - 15.6.3. Recent Developments
 - 15.6.4. Key Personnel/Key Contact Person
 - 15.6.5. Key Product/Services Offered
- 15.7. Shimadzu Corporation
 - 15.7.1. Business Overview
 - 15.7.2. Key Revenue and Financials
 - 15.7.3. Recent Developments
 - 15.7.4. Key Personnel/Key Contact Person
 - 15.7.5. Key Product/Services Offered
- 15.8. Leica Microsystems
 - 15.8.1. Business Overview
 - 15.8.2. Key Revenue and Financials
 - 15.8.3. Recent Developments
 - 15.8.4. Key Personnel/Key Contact Person
 - 15.8.5. Key Product/Services Offered
- 15.9. Medtronic (Visionsense)
 - 15.9.1. Business Overview
 - 15.9.2. Key Revenue and Financials
 - 15.9.3. Recent Developments
 - 15.9.4. Key Personnel/Key Contact Person
 - 15.9.5. Key Product/Services Offered
- 15.10. PerkinElmer, Inc.
 - 15.10.1. Business Overview
 - 15.10.2. Key Revenue and Financials
 - 15.10.3. Recent Developments

- 15.10.4. Key Personnel/Key Contact Person
- 15.10.5. Key Product/Services Offered
- 15.11. Carl Zeiss Meditec
 - 15.11.1. Business Overview
 - 15.11.2. Key Revenue and Financials
 - 15.11.3. Recent Developments
 - 15.11.4. Key Personnel/Key Contact Person
 - 15.11.5. Key Product/Services Offered
- 15.12. Fluoptics
 - 15.12.1. Business Overview
 - 15.12.2. Key Revenue and Financials
 - 15.12.3. Recent Developments
 - 15.12.4. Key Personnel/Key Contact Person
 - 15.12.5. Key Product/Services Offered

16. STRATEGIC RECOMMENDATIONS

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