

Radiology AI Market Size, Share and Growth Outlook 2026: By Offering, By Deployment Mode, By Imaging Modality, By Application, By Medical Specialty, By End User, Companies to 2034

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Abstracts

The global Radiology AI Market size is forecast to increase from \$1.3 Billion in 2026 to \$9.12 Billion in 2034 at a CAGR of 27.58% between 2026 and 2034.

The Radiology AI market report provides detailed analysis and outlook of Radiology AI segments including By Offering (Software Solutions, Hardware and Computational Engines, Professional and Integration Services), By Deployment Mode (Cloud-Based Deployment, On-Premises Deployment, Web-Based Deployment), By Imaging Modality (Computed Tomography (CT), Magnetic Resonance Imaging (MRI), X-Ray and Digital Radiography, Ultrasound Systems, Mammography and Molecular Imaging), By Application (Computer-Aided Detection and Diagnosis (CAdE/CADx), Image Analysis and Interpretation, Workflow Optimization and Productivity Platforms, Image Reconstruction and Enhancement), By Medical Specialty (Neurology and Neuroradiology, Oncology and Tumor Assessment, Cardiology and Cardiovascular Imaging, Musculoskeletal Disorders, Chest and Respiratory Medicine), By End User (Hospitals and Acute Care Networks, Diagnostic Imaging and Radiology Centers, Outpatient Clinics and Ambulatory Care Facilities) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Radiology AI Industry Overview

Foundation Models, Enterprise Imaging Platforms, and Clinical Governance Frameworks Are Accelerating Radiology AI Adoption

The radiology artificial intelligence industry is entering a new phase of clinical maturity characterized by the emergence of domain-specific foundation models, enterprise-wide imaging AI ecosystems, and formalized governance frameworks. Healthcare providers are increasingly adopting AI technologies not only for image interpretation but also for workflow orchestration, clinical decision support, automated reporting, and quality management. Advances in multimodal large language models, cloud-native imaging platforms, and regulatory oversight mechanisms are enabling radiology departments to transition from isolated AI applications toward scalable, enterprise-grade diagnostic intelligence infrastructures.

Domain-Specific Foundation Models Are Transforming Diagnostic Interpretation

Large-scale foundation models trained exclusively on radiology datasets are rapidly redefining clinical image analysis and report generation capabilities. These models are increasingly capable of integrating multimodal imaging data, historical examinations, and longitudinal patient information to support more comprehensive diagnostic workflows. This trend is demonstrated by the launch of Harrison.Rad 1.5 by Harrison.ai. Trained on approximately six million diagnostic studies, the domain-specific foundation model can analyze multimodal imaging examinations alongside prior patient records to automatically generate complex radiology reports. The model's performance, which exceeded the pass threshold of the Royal College of Radiologists FRCR 2B Short Case examination benchmark, highlights the growing sophistication of radiology-specific artificial intelligence systems.

Cloud-Native AI Ecosystems Are Expanding Across Imaging Modalities

Healthcare systems are increasingly implementing integrated, cloud-based artificial intelligence platforms capable of supporting multiple imaging modalities within a unified clinical environment. These ecosystems enable scalable deployment, centralized analytics, and workflow standardization across radiology networks. This trend is illustrated by the cloud-first imaging portfolio introduced by DeepHealth, a subsidiary of RadNet. The platform encompasses artificial intelligence applications spanning magnetic resonance imaging, computed tomography, radiography, mammography, and ultrasound. Notable developments include specialized breast imaging algorithms capable of assessing cardiovascular risk through breast arterial calcification analysis and the deployment of vendor-neutral remote imaging acquisition technologies through the CE-marked TechLive platform.

Clinical Governance and Quality Assurance Frameworks Are Supporting AI Integration

As artificial intelligence adoption accelerates, healthcare organizations are increasingly prioritizing governance frameworks that ensure clinical safety, regulatory compliance, and long-term performance monitoring. Structured validation and quality management systems are becoming essential components of radiology AI implementation strategies. This trend is demonstrated by the publication of the ACR-SIIM Practice Parameter for Imaging Artificial Intelligence by the American College of Radiology and the Society for Imaging Informatics in Medicine. Complementing these guidelines, the Assess-AI quality registry framework establishes standardized methodologies for local validation, governance oversight, privacy management, and post-deployment model monitoring across diverse clinical imaging applications.

Radiology AI Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Radiology AI market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- GE HealthCare, Siemens Healthineers AG, Philips Healthcare, Canon Medical Systems Corporation, Fujifilm Holdings Corporation, NVIDIA Corporation, Aidoc Medical Ltd., Viz.ai, Lunit, Annalise.ai. The Radiology AI market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Radiology AI industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Radiology AI Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Radiology AI companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

Detailed SWOT Analysis of global and regional Radiology AI markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Radiology AI Market Competitive Benchmarking and Company Analysis

Leading companies in Radiology AI industry include- GE HealthCare, Siemens Healthineers AG, Philips Healthcare, Canon Medical Systems Corporation, Fujifilm Holdings Corporation, NVIDIA Corporation, Aidoc Medical Ltd., Viz.ai, Lunit, Annalise.ai. The Radiology AI market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Radiology AI Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Radiology AI market remains one of the strongest-performing segments in the country.

The US Radiology AI Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance

efficiency and cost management. The US Radiology AI market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Radiology AI industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Radiology AI markets

Canada's strong Radiology AI sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Radiology AI market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Radiology AI Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Radiology AI market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Radiology AI population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Radiology AI industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Radiology AI market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Radiology

AI sales through 2034

France Radiology AI companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Radiology AI Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Radiology AI distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Radiology AI Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Radiology AI market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Radiology AI industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market

outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Radiology AI industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Radiology AI Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Radiology AI market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Radiology AI market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Radiology AI Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader

MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Radiology AI Market Segmentation

By Offering

Software Solutions

Hardware and Computational Engines

Professional and Integration Services

By Deployment Mode

Cloud-Based Deployment

On-Premises Deployment

Web-Based Deployment

By Imaging Modality

Computed Tomography (CT)

Magnetic Resonance Imaging (MRI)

X-Ray and Digital Radiography

Ultrasound Systems

Mammography and Molecular Imaging

By Application

Computer-Aided Detection and Diagnosis (CAdE/CAdx)

Image Analysis and Interpretation

Workflow Optimization and Productivity Platforms

Image Reconstruction and Enhancement

By Medical Specialty

Neurology and Neuroradiology

Oncology and Tumor Assessment

Cardiology and Cardiovascular Imaging

Musculoskeletal Disorders

Chest and Respiratory Medicine

By End User

Hospitals and Acute Care Networks

Diagnostic Imaging and Radiology Centers

Outpatient Clinics and Ambulatory Care Facilities

Leading Companies in Radiology AI Industry (2026)

GE HealthCare

Siemens Healthineers AG

Philips Healthcare

Canon Medical Systems Corporation

Fujifilm Holdings Corporation

NVIDIA Corporation

Aidoc Medical Ltd.

Viz.ai

Lunit

Annalise.ai

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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Strategic Value of the Electrosurgical Generators Market Analysis

Radiology AI Market Size, Share and Growth Outlook 2026: By Offering, By Deployment Mode, By Imaging Modality,....

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Stay ahead of competition through a detailed analysis of recent market developments

Make trusted decisions building on our 10-year experience in developing reports on Electrosurgical Generators industry

Contents

CHAPTER 1- EXECUTIVE SUMMARY

- 1.1. Market Snapshot: Market Size, CAGR, and Growth Outlook to 2034
- 1.2. Key Industry Highlights, 2026
- 1.3. Premium Market Insights
 - 1.3.1. Potential Radiology AI Market Types and Applications
 - 1.3.2. Fastest Growing Countries Over the forecast period
- 1.4. Market Scope and Segmentation
 - 1.4.1. Key Market Segments
 - 1.4.2. Key Countries and Regions
 - 1.4.3. Top Companies in the Radiology AI Industry
- 1.5. Macroeconomic and Demographic Outlook
 - 1.5.1. GDP Outlook by Top 20 Countries, 2010- 2040
 - 1.5.2. Population Forecast by Country, 2010- 2040
 - 1.5.3. Inflation Trends in Leading Countries
- 1.6. Impact of Trade Policies, Regulations, and Sustainability
 - 1.6.1. Trade tariffs and localization requirements
 - 1.6.2. ESG and sustainability pressures
 - 1.6.3. Compliance-driven structural changes in the value chain

CHAPTER 2- RESEARCH METHODOLOGY

- 2.1. Report Coverage
- 2.2. Secondary Research
- 2.3. Primary Research
- 2.4. Data Triangulation
- 2.5. Market Modeling and Forecasting

CHAPTER 3- GLOBAL RADIOLOGY AI MARKET TRENDS, GROWTH DRIVERS, CHALLENGES, AND OPPORTUNITIES THROUGH 2034

- 3.1. An Introduction to Global Radiology AI Markets in 2026
- 3.2. Global Historic and Forecast Radiology AI Market Size Outlook, USD Million, 2021-2034
- 3.3. Annual Market Size Growth Rate (Y-o-Y), %, 2021-2034
- 3.4. Market Dynamics
 - 3.4.1. Key Radiology AI Market Driving Forces and Their Impact on Market Outlook

- 3.4.2. Short and Long-Term Trends and Insights Shaping the Future
- 3.4.3. Potential Radiology AI Market Opportunities for Industry Stakeholders
- 3.4.4. Potential Challenges across Radiology AI Value Chain

CHAPTER 4- RADIOLOGY AI MARKET COMPETITIVE LANDSCAPE, STRATEGIC ANALYSIS, AND VALUE CHAIN ASSESSMENT

- 4.1. Porter's Five Forces Analysis
 - 4.1.1. Bargaining Power of Buyers
 - 4.1.2. Bargaining Power of Suppliers
 - 4.1.3. Threat of Substitutes
 - 4.1.4. Threat of New Entrants
 - 4.1.5. Intensity of Competitive Rivalry
 - 4.1.6. Market Attractiveness Analysis by Segment
 - 4.1.7. Market Attractiveness Analysis by Region
- 4.2. Competitive Landscape
 - 4.2.1 Market Share Analysis of Leading Radiology AI Companies
 - 4.2.2 Recent Strategic Developments
 - 4.2.3 Mergers, Acquisitions, and Partnerships
 - 4.2.4 Product Launches and Innovation Trends
 - 4.2.5 Key Success Factors
- 4.3. Value Chain Analysis
 - 4.3.1. Key Value Chain Segments
 - 4.3.2. Dominant players by value-chain stage
- 4.4. SWOT Analysis
 - 4.4.1. Key Strengths and Opportunities
 - 4.4.2. Major Weaknesses and Threats
- 4.5 Technology Roadmap
- 4.6 Regulatory and Reimbursement Landscape

CHAPTER 5- RADIOLOGY AI MARKET OUTLOOK BY SEGMENTS

- 5.1. Market Size Outlook by Type, USD Million, 2021- 2025 and 2026-2034
 - 5.2. Market Size Outlook by Application, USD Million, 2021- 2025 and 2026-2034
 - 5.3. Market Size Outlook by Country, USD Million, 2021- 2025 and 2026-2034
- By Offering
 - Software Solutions
 - Hardware and Computational Engines
 - Professional and Integration Services

By Deployment Mode

Cloud-Based Deployment

On-Premises Deployment

Web-Based Deployment

By Imaging Modality

Computed Tomography (CT)

Magnetic Resonance Imaging (MRI)

X-Ray and Digital Radiography

Ultrasound Systems

Mammography and Molecular Imaging

By Application

Computer-Aided Detection and Diagnosis (CAdE/CAdx)

Image Analysis and Interpretation

Workflow Optimization and Productivity Platforms

Image Reconstruction and Enhancement

By Medical Specialty

Neurology and Neuroradiology

Oncology and Tumor Assessment

Cardiology and Cardiovascular Imaging

Musculoskeletal Disorders

Chest and Respiratory Medicine

By End User

Hospitals and Acute Care Networks

Diagnostic Imaging and Radiology Centers

Outpatient Clinics and Ambulatory Care Facilities

CHAPTER 6- SCENARIO ANALYSIS AND OUTLOOK

6.1. Base Case Scenario

6.1.1. Definitions and Insights

6.1.2. Market Size Outlook to 2034

6.2. Low Growth Case Scenario

6.2.1. Definitions and Insights

6.2.2. Market Size Outlook to 2034

6.3. High Growth Case Scenario

6.3.1. Definitions and Insights

6.3.2. Market Size Outlook to 2034

CHAPTER 7- NORTH AMERICA RADIOLOGY AI MARKET SIZE ANALYSIS AND

Radiology AI Market Size, Share and Growth Outlook 2026: By Offering, By Deployment Mode, By Imaging Modality,....

OUTLOOK

- 7.1. North America Radiology AI Market Overview, 2026
- 7.2. Leading Companies Operating in North America
- 7.3. Key Industry Statistics, 2026
- 7.4. North America Radiology AI Market Trends and Growth Opportunities to 2034
- 7.5. North America Radiology AI Market Size Outlook by Type
- 7.6. North America Radiology AI Market Size Outlook by Application
- 7.7. North America Radiology AI Market Size Outlook by Country
- 7.8. United States
 - 7.8.1. Key Statistics
 - 7.8.2. The US Radiology AI Market Size Outlook, 2021- 2034
 - 7.8.3. Key Market Drivers and Industry Developments in the US Radiology AI Companies
- 7.9. Canada
 - 7.9.1. Key Statistics
 - 7.9.2. Canada Radiology AI Market Size Outlook, 2021- 2034
 - 7.9.3. Key Market Drivers and Industry Developments in Canada Radiology AI Companies
- 7.10. Mexico
 - 7.10.1. Key Statistics
 - 7.10.2. Mexico Radiology AI Market Size Outlook, 2021- 2034
 - 7.10.3. Key Market Drivers and Industry Developments in Mexico Radiology AI Companies

CHAPTER 8- EUROPE RADIOLOGY AI MARKET SIZE ANALYSIS AND OUTLOOK

- 8.1. Europe Radiology AI Market Overview, 2026
- 8.2. Leading Companies Operating in Europe
- 8.3. Key Industry Statistics, 2026
- 8.4. Europe Radiology AI Market Trends and Growth Opportunities to 2034
- 8.5. Europe Radiology AI Market Size Outlook by Type
- 8.6. Europe Radiology AI Market Size Outlook by Application
- 8.7. Europe Radiology AI Market Size Outlook by Country
- 8.8. Germany
 - 8.8.1. Key Statistics
 - 8.8.2. Germany Radiology AI Market Size Outlook, 2021- 2034
 - 8.8.3. Key Market Drivers and Industry Developments in Germany Radiology AI Companies

8.9. France

8.9.1. Key Statistics

8.9.2. France Radiology AI Market Size Outlook, 2021- 2034

8.9.3. Key Market Drivers and Industry Developments in France Radiology AI

Companies

8.10. United Kingdom

8.10.1. Key Statistics

8.10.2. United Kingdom Radiology AI Market Size Outlook, 2021- 2034

8.10.3. Key Market Drivers and Industry Developments in the UK Radiology AI

Companies

8.11. Spain

8.11.1. Key Statistics

8.11.2. Spain Radiology AI Market Size Outlook, 2021- 2034

8.11.3. Key Market Drivers and Industry Developments in Spain Radiology AI

Companies

8.12. Italy

8.12.1. Key Statistics

8.12.2. Italy Radiology AI Market Size Outlook, 2021- 2034

8.12.3. Key Market Drivers and Industry Developments in Italy Radiology AI

Companies

8.13. Rest of Europe

8.13.1. Key Statistics

8.13.2. Rest of Europe Radiology AI Market Size Outlook, 2021- 2034

8.13.3. Key Market Drivers and Industry Developments in Rest of Europe Radiology AI

Companies

CHAPTER 9- ASIA PACIFIC RADIOLOGY AI MARKET SIZE ANALYSIS AND OUTLOOK

9.1. Asia Pacific Radiology AI Market Overview, 2026

9.2. Leading Companies Operating in Asia Pacific

9.3. Key Industry Statistics, 2026

9.4. Asia Pacific Radiology AI Market Trends and Growth Opportunities to 2034

9.5. Asia Pacific Radiology AI Market Size Outlook by Type

9.6. Asia Pacific Radiology AI Market Size Outlook by Application

9.7. Asia Pacific Radiology AI Market Size Outlook by Country

9.8. China

9.8.1. Key Statistics

9.8.2. China Radiology AI Market Size Outlook, 2021- 2034

- 9.8.3. Key Market Drivers and Industry Developments in China Radiology AI Companies
- 9.9. Japan
 - 9.9.1. Key Statistics
 - 9.9.2. Japan Radiology AI Market Size Outlook, 2021- 2034
 - 9.9.3. Key Market Drivers and Industry Developments in Japan Radiology AI Companies
- 9.10. India
 - 9.10.1. Key Statistics
 - 9.10.2. India Radiology AI Market Size Outlook, 2021- 2034
 - 9.10.3. Key Market Drivers and Industry Developments in India Radiology AI Companies
- 9.11. South Korea
 - 9.11.1. Key Statistics
 - 9.11.2. South Korea Radiology AI Market Size Outlook, 2021- 2034
 - 9.11.3. Key Market Drivers and Industry Developments in South Korea Radiology AI Companies
- 9.12. Australia
 - 9.12.1. Key Statistics
 - 9.12.2. Australia Radiology AI Market Size Outlook, 2021- 2034
 - 9.12.3. Key Market Drivers and Industry Developments in Australia Radiology AI Companies
- 9.13. Southeast Asia
 - 9.13.1. Key Statistics
 - 9.13.2. Southeast Asia Radiology AI Market Size Outlook, 2021- 2034
 - 9.13.3. Key Market Drivers and Industry Developments in Southeast Asia Radiology AI Companies

CHAPTER 10- SOUTH AND CENTRAL AMERICA RADIOLOGY AI MARKET SIZE ANALYSIS AND OUTLOOK

- 10.1. South and Central America Radiology AI Market Overview, 2026
- 10.2. Leading Companies Operating in South and Central America
- 10.3. Key Industry Statistics, 2026
- 10.4. South and Central America Radiology AI Market Trends and Growth Opportunities to 2034
- 10.5. South and Central America Radiology AI Market Size Outlook by Type
- 10.6. South and Central America Radiology AI Market Size Outlook by Application
- 10.7. South and Central America Radiology AI Market Size Outlook by Country

10.8. Brazil

10.8.1. Key Statistics

10.8.2. Brazil Radiology AI Market Size Outlook, 2021- 2034

10.8.3. Key Market Drivers and Industry Developments in Brazil Radiology AI

Companies

10.9. Argentina

10.9.1. Key Statistics

10.9.2. Argentina Radiology AI Market Size Outlook, 2021- 2034

10.9.3. Key Market Drivers and Industry Developments in Argentina Radiology AI

Companies

10.10. Rest of Latin America

10.10.1. Key Statistics

10.10.2. Rest of Latin America Radiology AI Market Size Outlook, 2021- 2034

10.10.3. Key Market Drivers and Industry Developments in Rest of Latin America

Radiology AI Companies

CHAPTER 11- MIDDLE EAST AND AFRICA RADIOLOGY AI MARKET SIZE ANALYSIS AND OUTLOOK

11.1. Middle East and Africa Radiology AI Market Overview, 2026

11.2. Leading Companies Operating in Middle East and Africa

11.3. Key Industry Statistics, 2026

11.4. Middle East and Africa Radiology AI Market Trends and Growth Opportunities to 2034

11.5. Middle East and Africa Radiology AI Market Size Outlook by Type

11.6. Middle East and Africa Radiology AI Market Size Outlook by Application

11.7. Middle East and Africa Radiology AI Market Size Outlook by Country

11.8. Saudi Arabia

11.8.1. Key Statistics

11.8.2. Saudi Arabia Radiology AI Market Size Outlook, 2021- 2034

11.8.3. Key Market Drivers and Industry Developments in Saudi Arabia Radiology AI

Companies

11.9. United Arab Emirates

11.9.1. Key Statistics

11.9.2. The UAE Radiology AI Market Size Outlook, 2021- 2034

11.9.3. Key Market Drivers and Industry Developments in the UAE Radiology AI

Companies

11.10. Africa

11.10.1. Key Statistics

11.10.2. Africa Radiology AI Market Size Outlook, 2021- 2034

11.10.3. Key Market Drivers and Industry Developments in Africa Radiology AI
Companies

CHAPTER 12- COMPANY PROFILES

12.1. Top Companies in Radiology AI Industry

GE HealthCare

Siemens Healthineers AG

Philips Healthcare

Canon Medical Systems Corporation

Fujifilm Holdings Corporation

NVIDIA Corporation

Aidoc Medical Ltd.

Viz.ai

Lunit

Annalise.ai

12.2. Business Description

12.3. SWOT Profiles

12.4. Products and Services

CHAPTER 13- APPENDIX

Glossary of Terms

Research Methodology & Data Sources

Conclusion & Strategic Recommendations

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