

Global Rotating Gamma System (RGS) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Rotating Gamma System (RGS) market size is expected to reach \$ 248 million by 2032, rising at a market growth of 4.0% CAGR during the forecast period (2026-2032).

A Rotating Gamma System (RGS) is a cobalt-60 (^{60}Co)-based stereotactic radiosurgery / stereotactic radiotherapy platform that concentrates many narrowly collimated gamma beams onto a defined isocenter to deliver a very high, conformal dose to a small target (most commonly intracranial).

The upstream supply chain centers on: sealed ^{60}Co sources (radioisotope production, encapsulation, transport, loading/reloading services), heavy radiation shielding and collimation hardware (commonly high-density materials such as tungsten in gamma radiosurgery collimator assemblies), precision electromechanical rotation/gantry & couch systems, and the treatment planning + dosimetry/QA ecosystem (commissioning phantoms, chambers/film, routine verification). Modern stereotactic programs also depend on 3D imaging (CT/MRI/PET), image guidance, and immobilization/positioning systems to keep geometric errors extremely small.

Downstream, RGS is deployed in hospital radiation oncology / neurosurgery programs as a non-incisional, high-precision modality for selected lesions where steep dose fall-off is needed. Clinically it is used in the same stereotactic framework as other radiosurgery platforms: target definition by CT/MRI, immobilization, plan optimization, and delivery in single-fraction SRS or hypofractionated stereotactic radiotherapy when clinically indicated.

In 2025, global sales of Rotating Gamma System (RGS) reached approximately 52 units, with an average global market price of around US\$ 3.5 million/unit. Production capacity varies significantly among manufacturers, with gross profit margins ranging from approximately 35% to 45%.

Demand for rotating gamma and dedicated gamma radiosurgery platforms is anchored

in their clinical value: highly conformal dose delivery, steep dose fall-off, and a minimally invasive workflow that can be completed efficiently for carefully selected intracranial lesions and certain functional indications. As multidisciplinary oncology pathways mature and patients place greater weight on recovery time and quality of life, hospitals with strong neuro-oncology capability continue to view dedicated stereotactic platforms as a way to differentiate clinical outcomes and streamline care. Technology refreshes that improve planning efficiency, image registration, and workflow automation further encourage existing centers to upgrade rather than stand still.

The market's main constraints are concentrated in capital intensity and regulatory complexity. Site shielding and commissioning, radioactive source logistics, licensing, and radiation safety governance all add friction and extend decision cycles. In parallel, ongoing advances in linac-based stereotactic solutions intensify competition by offering broader versatility and resource sharing across departments, pushing gamma platforms toward a "high-specialization, high-utilization" positioning where operational excellence and referral networks matter as much as the equipment itself.

Overall, the segment behaves like an installed-base business: recurring service, software, and source-replacement activities are material to lifecycle economics, and leading suppliers reinforce loyalty through clinical evidence, training ecosystems, and end-to-end uptime support. Future expansion is therefore more sensitive to neuro-oncology capacity building and the sustained recognition of stereotactic value than to simple equipment proliferation.

This report studies the global Rotating Gamma System (RGS) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Rotating Gamma System (RGS) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Rotating Gamma System (RGS) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Rotating Gamma System (RGS) total production and demand, 2021-2032, (Units)

Global Rotating Gamma System (RGS) total production value, 2021-2032, (USD Million)

Global Rotating Gamma System (RGS) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Rotating Gamma System (RGS) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Rotating Gamma System (RGS) domestic production, consumption, key domestic manufacturers and share

Global Rotating Gamma System (RGS) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Rotating Gamma System (RGS) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Rotating Gamma System (RGS) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Rotating Gamma System (RGS) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Elekta, American Radiosurgery, Akesis, China Isotope & Radiation Corporation (CIRC), Masep Medical, Our United, etc. This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Rotating Gamma System (RGS) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Rotating Gamma System (RGS) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Rotating Gamma System (RGS) Market, Segmentation by Type:

Head Gamma Knife

Body Gamma Knife

Global Rotating Gamma System (RGS) Market, Segmentation by Source Motion Mode:

Rotating-Source Gamma System

Static-Source Gamma System

Global Rotating Gamma System (RGS) Market, Segmentation by Collimation Architecture:

Fixed Cone Collimators

Helmet-Based Interchangeable Collimation

Other

Global Rotating Gamma System (RGS) Market, Segmentation by Application:

Brain Stereotactic Radiosurgery

Stereotactic Body Radiation Therapy (SBRT)

Companies Profiled:

Elekta

American Radiosurgery

Akesis

China Isotope & Radiation Corporation (CIRC)

Masep Medical

Our United

Key Questions Answered:

1. How big is the global Rotating Gamma System (RGS) market?
2. What is the demand of the global Rotating Gamma System (RGS) market?
3. What is the year over year growth of the global Rotating Gamma System (RGS) market?
4. What is the production and production value of the global Rotating Gamma System (RGS) market?
5. Who are the key producers in the global Rotating Gamma System (RGS) market?
6. What are the growth factors driving the market demand?

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