

# **Intraoperative Radiation Therapy Market Size, Share & Trends Analysis Report By Technology, (Electron IORT (E-IORT), X-ray / Low-Energy IORT), By Application (Breast Cancer, Brain Tumors, Head & Neck Cancer), By End-use, By Region, And Segment Forecasts, 2025 - 2033**

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## **Abstracts**

### **Intraoperative Radiation Therapy Market Summary**

The global intraoperative radiation therapy market size was estimated at USD 121.74 million in 2024 and is projected to reach USD 247.14 million by 2033, growing at a CAGR of 8.2% from 2025 to 2033. The intraoperative radiation therapy (IORT) market is expanding in response to the rising cancer burden.

According to the World Health Organization's report published in February 2024, there were 20 million new cases and 9.7 million deaths reported in 2022. IORT devices, including mobile linear accelerators, compact X-ray platforms, and brachytherapy systems, enable precise delivery of radiation directly to the tumor bed during surgery. This targeted approach reduces exposure to surrounding healthy tissues and minimizes local recurrence risks. With 53.5 million patients living within five years of a cancer diagnosis, hospitals, and specialty centers are increasingly adopting these devices to improve long-term outcomes. The lifetime cancer risk of 1 in 5 people further highlights the need for patient-centric devices that streamline treatment and improve adherence.

Breast and colorectal cancers are key drivers for IORT device adoption due to their high incidence rates. In 2022, breast cancer accounted for 2.3 million new cases (11.6%), while colorectal cancer contributed 1.9 million new cases (9.6%). Hospitals are

deploying electron-based IORT systems, low-energy X-ray devices, and applicator-guided brachytherapy tools to deliver high-dose intraoperative radiation in a single session. This reduces the need for extended postoperative radiotherapy. These devices improve local tumor control, shorten treatment timelines, and reduce hospitalization costs. Patient convenience and workflow efficiency are critical advantages, encouraging wider integration of IORT systems in surgical oncology suites globally across hospitals and specialty centers.

The IORT device market is expected to grow as the global cancer burden rises, with over 35 million new cases predicted by 2050, representing a 77% increase from 2022. Population growth, aging, and lifestyle risk factors such as tobacco, alcohol, obesity, and environmental exposures drive this surge. High HDI countries are projected to see the most significant absolute increase, with 4.8 million additional cases, while low HDI countries could experience a 142% proportional increase and medium HDI countries 99%. The projected doubling of cancer mortality in these regions underscores the need for advanced devices capable of delivering precise, efficient treatment. The growing adoption of electron accelerators, X-ray IORT systems, and brachytherapy devices will be central to addressing rising clinical demand worldwide.

The 2022 global cancer incidence data reveals significant regional disparities, with Asia reporting the highest cases (9.8 million), followed by Europe (4.47M), North America (2.67M), Africa (1.55M), and Latin America/Caribbean (1.18M). This highlights the urgent need for region-specific cancer management and advanced therapies. Intraoperative Radiation Therapy (IORT), delivering targeted radiation during surgery, offers precise treatment while minimizing healthy tissue exposure, particularly valuable in high-incidence regions such as Asia and Europe. Rising cancer rates in North America and Africa also boost demand for advanced modalities. Adoption of IORT can shorten treatment duration, reduce hospitalization costs, and enhance patient outcomes. Expanding healthcare infrastructure, favorable reimbursement policies, and innovations in compact IORT systems are expected to drive global market growth.

## Global Intraoperative Radiation Therapy Market Report Segmentation

This report forecasts revenue growth at global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the global intraoperative radiation therapy market report based on technology, application, end-use, and region:

Technology Outlook (Revenue, USD Million, 2021 - 2033)

Electron IORT (E-IORT)

Intraoperative Brachytherapy (HDR / LDR Afterloaders)

X-ray / Low-Energy IORT

Application Outlook (Revenue, USD Million, 2021 - 2033)

Breast Cancer

Brain Tumors

Gastrointestinal Cancers

Head & Neck Cancer

Others

End-use Outlook (Revenue, USD Million, 2021 - 2033)

Hospitals and Clinics

Specialty Cancer Centers

Ambulatory Centers

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

UK

Germany

France

Italy

Spain

Denmark

Sweden

Norway

Asia Pacific

Japan

China

India

Australia

South Korea

Thailand

Latin America

Brazil

Argentina

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

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## Contents

### CHAPTER 1. METHODOLOGY AND SCOPE

- 1.1. Market Segmentation & Scope
- 1.2. Segment Definitions
  - 1.2.1. Technology
  - 1.2.2. Application
  - 1.2.3. End Use
- 1.3. Estimates and Forecast Timeline
- 1.4. Research Methodology
- 1.5. Information Procurement
  - 1.5.1. Purchased Database
  - 1.5.2. GVR's Internal Database
  - 1.5.3. Secondary Sources
  - 1.5.4. Primary Research
- 1.6. Information Analysis
  - 1.6.1. Data Analysis Models
- 1.7. Market Formulation & Data Visualization
- 1.8. Model Details
  - 1.8.1. Commodity Flow Analysis
- 1.9. List of Secondary Sources
- 1.10. Objectives

### CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. Market Snapshot
- 2.2. Segment Snapshot
- 2.3. Competitive Landscape Snapshot

### CHAPTER 3. INTRAOPERATIVE RADIATION THERAPY MARKET VARIABLES, TRENDS, & SCOPE

- 3.1. Market Lineage Outlook
- 3.2. Market Dynamics
  - 3.2.1. Market Driver Analysis
  - 3.2.2. Market Restraint Analysis
- 3.3. Business Environment Analysis
  - 3.3.1. Industry Analysis - Porter's Five Forces Analysis

- 3.3.1.1. Supplier Power
- 3.3.1.2. Buyer Power
- 3.3.1.3. Substitution Threat
- 3.3.1.4. Threat of New Entrants
- 3.3.1.5. Competitive Rivalry
- 3.3.2. PESTLE Analysis

## **CHAPTER 4. INTRAOPERATIVE RADIATION THERAPY MARKET: TECHNOLOGY BUSINESS ANALYSIS**

- 4.1. Technology Market Share, 2024 & 2033
- 4.2. Technology Segment Dashboard
- 4.3. Market Size & Forecasts and Trend Analysis, by Technology, 2021 to 2033 (USD Million)
- 4.4. Electron IORT (E-IORT)
  - 4.4.1. Electron IORT (E-IORT) Market, 2021 - 2033 (USD Million)
- 4.5. Intraoperative Brachytherapy (HDR / LDR Afterloaders)
  - 4.5.1. Intraoperative Brachytherapy (HDR / LDR Afterloaders) Market, 2021 - 2033 (USD Million)
- 4.6. X-ray / Low-Energy IORT
  - 4.6.1. X-ray / Low-Energy IORT Market, 2021 - 2033 (USD Million)

## **CHAPTER 5. INTRAOPERATIVE RADIATION THERAPY MARKET: APPLICATION BUSINESS ANALYSIS**

- 5.1. Application Market Share, 2024 & 2033
- 5.2. Application Segment Dashboard
- 5.3. Market Size & Forecasts and Trend Analysis, by Application, 2021 to 2033 (USD Million)
- 5.4. Breast Cancer
  - 5.4.1. Breast Cancer Market, 2021 - 2033 (USD Million)
- 5.5. Brain Tumors
  - 5.5.1. Brain Tumors Market, 2021 - 2033 (USD Million)
- 5.6. Gastrointestinal Cancers
  - 5.6.1. Gastrointestinal Cancers Market, 2021 - 2033 (USD Million)
- 5.7. Head & Neck Cancer
  - 5.7.1. Head & Neck Cancer Market, 2021 - 2033 (USD Million)
- 5.8. Others
  - 5.8.1. Others Market, 2021 - 2033 (USD Million)

## **CHAPTER 6. INTRAOPERATIVE RADIATION THERAPY MARKET: END USE BUSINESS ANALYSIS**

- 6.1. End Use Market Share, 2024 & 2033
- 6.2. End Use Segment Dashboard
- 6.3. Market Size & Forecasts and Trend Analysis, by End use, 2021 to 2033 (USD Million)
- 6.4. Hospitals and Clinics
  - 6.4.1. Hospitals and Clinics Market, 2021 - 2033 (USD Million)
- 6.5. Specialty Cancer Centers
  - 6.5.1. Specialty Cancer Centers Market, 2021 - 2033 (USD Million)
- 6.6. Ambulatory Centers
  - 6.6.1. Ambulatory Centers Market, 2021 - 2033 (USD Million)

## **CHAPTER 7. INTRAOPERATIVE RADIATION THERAPY MARKET: COUNTRIES ESTIMATES & TREND ANALYSIS**

- 7.1. Country Market Share Analysis, 2024 & 2033
- 7.2. Country Market Dashboard
- 7.3. Market Size & Forecasts Trend Analysis, 2021 to 2033:
  - 7.3.1. U.S.
    - 7.3.1.1. Key Country Dynamics
    - 7.3.1.2. Target Disease Prevalence
    - 7.3.1.3. Regulatory Framework
    - 7.3.1.4. Reimbursement Framework
    - 7.3.1.5. Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)
  - 7.3.2. Canada
    - 7.3.2.1. Key Country Dynamics
    - 7.3.2.2. Target Disease Prevalence
    - 7.3.2.3. Regulatory Framework
    - 7.3.2.4. Reimbursement Framework
    - 7.3.2.5. U.S. Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)
  - 7.3.3. Mexico
    - 7.3.3.1. Key Country Dynamics
    - 7.3.3.2. Target Disease Prevalence
    - 7.3.3.3. Regulatory Framework

#### 7.3.3.4. Reimbursement Framework

7.3.3.5. Mexico Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

### 7.4. Europe

7.4.1. Europe Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

#### 7.4.2. UK

7.4.2.1. Key Country Dynamics

7.4.2.2. Target Disease Prevalence

7.4.2.3. Regulatory Framework

7.4.2.4. Reimbursement Framework

7.4.2.5. Uk Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

#### 7.4.3. Germany

7.4.3.1. Key Country Dynamics

7.4.3.2. Target Disease Prevalence

7.4.3.3. Regulatory Framework

7.4.3.4. Reimbursement Framework

7.4.3.5. Germany Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

#### 7.4.4. France

7.4.4.1. Key Country Dynamics

7.4.4.2. Target Disease Prevalence

7.4.4.3. Regulatory Framework

7.4.4.4. Reimbursement Framework

7.4.4.5. France Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

#### 7.4.5. Italy

7.4.5.1. Key Country Dynamics

7.4.5.2. Target Disease Prevalence

7.4.5.3. Regulatory Framework

7.4.5.4. Reimbursement Framework

7.4.5.5. Italy Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

#### 7.4.6. Spain

7.4.6.1. Key Country Dynamics

7.4.6.2. Target Disease Prevalence

7.4.6.3. Regulatory Framework

7.4.6.4. Reimbursement Framework

7.4.6.5. Spain Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

7.4.7. Denmark

7.4.7.1. Key Country Dynamics

7.4.7.2. Target Disease Prevalence

7.4.7.3. Regulatory Framework

7.4.7.4. Reimbursement Framework

7.4.7.5. Denmark Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

7.4.8. Sweden

7.4.8.1. Key Country Dynamics

7.4.8.2. Target Disease Prevalence

7.4.8.3. Regulatory Framework

7.4.8.4. Reimbursement Framework

7.4.8.5. Sweden Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

7.4.9. Norway

7.4.9.1. Key Country Dynamics

7.4.9.2. Target Disease Prevalence

7.4.9.3. Regulatory Framework

7.4.9.4. Reimbursement Framework

7.4.9.5. Norway Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

7.5. Asia Pacific

7.5.1. Asia Pacific Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

7.5.2. Japan

7.5.2.1. Key Country Dynamics

7.5.2.2. Target Disease Prevalence

7.5.2.3. Regulatory Framework

7.5.2.4. Reimbursement Framework

7.5.2.5. Japan Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

7.5.3. China

7.5.3.1. Key Country Dynamics

7.5.3.2. Target Disease Prevalence

7.5.3.3. Regulatory Framework

7.5.3.4. Reimbursement Framework

7.5.3.5. China Intraoperative Radiation Therapy Market Estimates and Forecasts,

2021 - 2033 (USD Million)

7.5.4. India

7.5.4.1. Key Country Dynamics

7.5.4.2. Target Disease Prevalence

7.5.4.3. Regulatory Framework

7.5.4.4. Reimbursement Framework

7.5.4.5. India Intraoperative Radiation Therapy Market Estimates and Forecasts,

2021 - 2033 (USD Million)

7.5.5. Australia

7.5.5.1. Key Country Dynamics

7.5.5.2. Target Disease Prevalence

7.5.5.3. Regulatory Framework

7.5.5.4. Reimbursement Framework

7.5.5.5. Australia Intraoperative Radiation Therapy Market Estimates and Forecasts,

2021 - 2033 (USD Million)

7.5.6. South Korea

7.5.6.1. Key Country Dynamics

7.5.6.2. Target Disease Prevalence

7.5.6.3. Regulatory Framework

7.5.6.4. Reimbursement Framework

7.5.6.5. South Korea Intraoperative Radiation Therapy Market Estimates and

Forecasts, 2021 - 2033 (USD Million)

7.5.7. Thailand

7.5.7.1. Key Country Dynamics

7.5.7.2. Target Disease Prevalence

7.5.7.3. Regulatory Framework

7.5.7.4. Reimbursement Framework

7.5.7.5. Thailand Intraoperative Radiation Therapy Market Estimates and Forecasts,

2021 - 2033 (USD Million)

7.6. Latin America

7.6.1. Latin America Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

7.6.2. Brazil

7.6.2.1. Key Country Dynamics

7.6.2.2. Target Disease Prevalence

7.6.2.3. Regulatory Framework

7.6.2.4. Reimbursement Framework

7.6.2.5. Japan Intraoperative Radiation Therapy Market Estimates and Forecasts,

2021 - 2033 (USD Million)

### 7.6.3. Argentina

7.6.3.1. Key Country Dynamics

7.6.3.2. Target Disease Prevalence

7.6.3.3. Regulatory Framework

7.6.3.4. Reimbursement Framework

7.6.3.5. China Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

### 7.7. Middle East and Africa

7.7.1. Middle East and Africa Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

#### 7.7.2. South Africa

7.7.2.1. Key Country Dynamics

7.7.2.2. Target Disease Prevalence

7.7.2.3. Regulatory Framework

7.7.2.4. Reimbursement Framework

7.7.2.5. South Africa Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

#### 7.7.3. Saudi Arabia

7.7.3.1. Key Country Dynamics

7.7.3.2. Target Disease Prevalence

7.7.3.3. Regulatory Framework

7.7.3.4. Reimbursement Framework

7.7.3.5. Saudi Arabia Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

#### 7.7.4. UAE

7.7.4.1. Key Country Dynamics

7.7.4.2. Target Disease Prevalence

7.7.4.3. Regulatory Framework

7.7.4.4. Reimbursement Framework

7.7.4.5. UAE Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

#### 7.7.5. Kuwait

7.7.5.1. Key Country Dynamics

7.7.5.2. Target Disease Prevalence

7.7.5.3. Regulatory Framework

7.7.5.4. Reimbursement Framework

7.7.5.5. Kuwait Intraoperative Radiation Therapy Market Estimates and Forecasts, 2021 - 2033 (USD Million)

## CHAPTER 8. COMPETITIVE LANDSCAPE

- 8.1. Participant Overview
- 8.2. Company Market Position Analysis
- 8.3. Company Categorization
- 8.4. Strategy Mapping
- 8.5. Company Profiles/Listing
  - 8.5.1. IntraOp Medical, Inc.
    - 8.5.1.1. Overview
    - 8.5.1.2. Financial Performance
    - 8.5.1.3. Product Benchmarking
    - 8.5.1.4. Strategic Initiatives
  - 8.5.2. Elekta
    - 8.5.2.1. Overview
    - 8.5.2.2. Financial Performance
    - 8.5.2.3. Product Benchmarking
    - 8.5.2.4. Strategic Initiatives
  - 8.5.3. S.I.T. Sordina IORT Technologies S.p.A.
    - 8.5.3.1. Overview
    - 8.5.3.2. Financial Performance
    - 8.5.3.3. Product Benchmarking
    - 8.5.3.4. Strategic Initiatives
  - 8.5.4. IBA Worldwide
    - 8.5.4.1. Overview
    - 8.5.4.2. Financial Performance
    - 8.5.4.3. Product Benchmarking
    - 8.5.4.4. Strategic Initiatives
  - 8.5.5. Carl Zeiss Meditec AG
    - 8.5.5.1. Overview
    - 8.5.5.2. Financial Performance
    - 8.5.5.3. Product Benchmarking
    - 8.5.5.4. Strategic Initiatives
  - 8.5.6. Eckert & Ziegler
    - 8.5.6.1. Overview
    - 8.5.6.2. Financial Performance
    - 8.5.6.3. Product Benchmarking
    - 8.5.6.4. Strategic Initiatives
  - 8.5.7. IsoRay, Inc.
    - 8.5.7.1. Overview

- 8.5.7.2. Financial Performance
- 8.5.7.3. Product Benchmarking
- 8.5.7.4. Strategic Initiatives
- 8.5.8. PTW?Freiburg GmbH
  - 8.5.8.1. Overview
  - 8.5.8.2. Financial Performance
  - 8.5.8.3. Product Benchmarking
  - 8.5.8.4. Strategic Initiatives
- 8.5.9. CIVCO Radiotherapy
  - 8.5.9.1. Overview
  - 8.5.9.2. Financial Performance
  - 8.5.9.3. Product Benchmarking
  - 8.5.9.4. Strategic Initiatives
- 8.5.10. Radcore Systems
  - 8.5.10.1. Overview
  - 8.5.10.2. Financial Performance
  - 8.5.10.3. Product Benchmarking
  - 8.5.10.4. Strategic Initiatives
- 8.5.11. Varian
  - 8.5.11.1. Overview
  - 8.5.11.2. Financial Performance
  - 8.5.11.3. Product Benchmarking
  - 8.5.11.4. Strategic Initiatives

## List Of Tables

### LIST OF TABLES

Table 1 List of secondary sources

Table 2 List of abbreviations

Table 3 Global intraoperative radiation therapy market, by region, 2021 - 2033 (USD Million)

Table 4 Global intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 5 Global intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 6 Global intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 7 North America intraoperative radiation therapy market, by country, 2021 - 2033 (USD Million)

Table 8 North America intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 9 North America intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 10 North America intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 11 U.S. intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 12 U.S. intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 13 U.S. intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 14 Canada intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 15 Canada intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 16 Canada intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 17 Mexico intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 18 Mexico intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 19 Mexico intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Million)

Table 20 Europe intraoperative radiation therapy market, by country, 2021 - 2033 (USD Million)

Table 21 Europe intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 22 Europe intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 23 Europe intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 24 UK intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 25 UK intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 26 UK intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 27 Germany intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 28 Germany intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 29 Germany intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 30 France intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 31 France intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 32 France intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 33 Italy intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 34 Italy intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 35 Italy intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 36 Spain intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 37 Spain intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 38 Spain intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 39 Norway intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 40 Norway intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 41 Norway intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 42 Denmark intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 43 Denmark intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 44 Denmark intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 45 Sweden intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 46 Sweden intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 47 Sweden intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 48 Asia Pacific intraoperative radiation therapy market, by country, 2021 - 2033 (USD Million)

Table 49 Asia Pacific intraoperative radiation therapy market, by technology, 2021 - 2033 (USD)

Table 50 Asia Pacific intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 51 Asia Pacific intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 52 Japan intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 53 Japan intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 54 Japan intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 55 China intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 56 China intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 57 China intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 58 India intraoperative radiation therapy market, by technology, 2021 - 2033

(USD Million)

Table 59 India intraoperative radiation therapy market, by application, 2021 - 2033

(USD Million)

Table 60 India intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 61 Australia intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 62 Australia intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 63 Australia intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 64 South Korea intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 65 South Korea intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 66 South Korea intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 67 Thailand intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 68 Thailand intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 69 Thailand intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 70 Latin America intraoperative radiation therapy market, by country, 2021 - 2033 (USD Million)

Table 71 Latin America intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 72 Latin America intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 73 Latin America intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 74 Brazil intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 75 Brazil intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 76 Brazil intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 77 Argentina intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 78 Argentina intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 79 Argentina intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 80 Middle East & Africa intraoperative radiation therapy market, by country, 2021 - 2033 (USD Million)

Table 81 Middle East & Africa intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 82 Middle East & Africa intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 83 Middle East & Africa intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 84 South Africa intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 85 South Africa intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 86 South Africa intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 87 Saudi Arabia intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 88 Saudi Arabia intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 89 Saudi Arabia intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 90 UAE intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 91 UAE intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 92 UAE intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

Table 93 Kuwait intraoperative radiation therapy market, by technology, 2021 - 2033 (USD Million)

Table 94 Kuwait intraoperative radiation therapy market, by application, 2021 - 2033 (USD Million)

Table 95 Kuwait intraoperative radiation therapy market, by end use, 2021 - 2033 (USD Million)

## List Of Figures

### LIST OF FIGURES

- Fig. 1 Intraoperative radiation therapy market segmentation
- Fig. 2 Market research process
- Fig. 3 Data triangulation techniques
- Fig. 4 Primary research pattern
- Fig. 5 Market research approaches
- Fig. 6 Value-chain-based sizing & forecasting
- Fig. 7 Market formulation & validation
- Fig. 8 Market snapshot
- Fig. 9 Therapeutic approach and application outlook (USD Million)
- Fig. 10 Competitive landscape
- Fig. 11 Intraoperative radiation therapy market dynamics
- Fig. 12 Intraoperative radiation therapy market: Porter's five forces analysis
- Fig. 13 Intraoperative radiation therapy market: PESTLE analysis
- Fig. 14 Technology market, 2021 - 2033 (USD Million)
- Fig. 15 Electron IORT (E-IORT) market, 2021 - 2033 (USD Million)
- Fig. 16 Intraoperative Brachytherapy (HDR / LDR Afterloaders) market, 2021 - 2033 (USD Million)
- Fig. 17 X-ray / Low-Energy IORT market, 2021 - 2033 (USD Million)
- Fig. 18 Application market, 2021 - 2033 (USD Million)
- Fig. 19 Breast cancer market, 2021 - 2033 (USD Million)
- Fig. 20 Brain tumors market, 2021 - 2033 (USD Million)
- Fig. 21 Gastrointestinal cancers market, 2021 - 2033 (USD Million)
- Fig. 22 Head & neck cancer market, 2021 - 2033 (USD Million)
- Fig. 23 Others market, 2021 - 2033 (USD Million)
- Fig. 24 End use market, 2021 - 2033 (USD Million)
- Fig. 25 Hospitals and clinics market, 2021 - 2033 (USD Million)
- Fig. 26 Specialty cancer centers market, 2021 - 2033 (USD Million)
- Fig. 27 Ambulatory centers market, 2021 - 2033 (USD Million)
- Fig. 28 Intraoperative radiation therapy market revenue, by region
- Fig. 29 Regional marketplace: Key takeaways
- Fig. 30 North America Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 31 U.S. country dynamics
- Fig. 32 U.S. Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 33 Canada country dynamics

- Fig. 34 Canada Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 35 Mexico country dynamics
- Fig. 36 Mexico Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 37 Europe Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 38 UK country dynamics
- Fig. 39 UK Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 40 Germany country dynamics
- Fig. 41 Germany Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 42 France country dynamics
- Fig. 43 France Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 44 Italy country dynamics
- Fig. 45 Italy Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 46 Spain country dynamics
- Fig. 47 Spain Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 48 Norway country dynamics
- Fig. 49 Norway Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 50 Sweden country dynamics
- Fig. 51 Sweden Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 52 Denmark country dynamics
- Fig. 53 Denmark Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 54 Asia Pacific Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 55 Japan country dynamics
- Fig. 56 Japan Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 57 China country dynamics
- Fig. 58 China Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 59 India country dynamics
- Fig. 60 India Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 61 Australia country dynamics
- Fig. 62 Australia Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 63 South Korea country dynamics
- Fig. 64 South Korea Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 65 Thailand country dynamics
- Fig. 66 Thailand Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 67 Latin America Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 68 Brazil country dynamics
- Fig. 69 Brazil Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 70 Argentina country dynamics
- Fig. 71 Argentina Intraoperative radiation therapy market, 2021 - 2033 (USD Million)
- Fig. 72 MEA Intraoperative radiation therapy market, 2021 - 2033 (USD Million)

Fig. 73 South Africa country dynamics

Fig. 74 South Africa Intraoperative radiation therapy market, 2021 - 2033 (USD Million)

Fig. 75 Saudi Arabia country dynamics

Fig. 76 Saudi Arabia Intraoperative radiation therapy market, 2021 - 2033 (USD Million)

Fig. 77 UAE country dynamics

Fig. 78 UAE Intraoperative radiation therapy market, 2021 - 2033 (USD Million)

Fig. 79 Kuwait country dynamics

Fig. 80 Kuwait Intraoperative radiation therapy market, 2021 - 2033 (USD Million)

Fig. 81 Company categorization

Fig. 82 Company market position analysis

Fig. 83 Strategic framework

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