

Image-Guided Radiation Therapy Market by Product (4D RT, LINAC, MRI-guided radiotherapy, Portal CT Imaging), Procedure (IMRT, Stereotactic, Particle), Application (Neck, Prostate, Breast cancer), Enduser (Hospital, ACC) & Region - Global Forecasts to 2028

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Abstracts

The global image-guided radiation therapy market is projected to reach USD 2.4 billion by 2028 from USD 1.9 billion in 2023, growing at a CAGR of 5.2% during the forecast period. The projected surge in market growth for image-guided radiation therapy (IGRT) is underpinned by a confluence of compelling advantages. Notably, IGRT's capacity to achieve exceptional precision in tumor targeting, coupled with its ability to mitigate collateral damage to healthy tissues, stands as a pivotal driver. Furthermore, the escalating global incidence of cancer amplifies the demand for advanced treatment modalities, with IGRT positioned as a forefront solution. This convergence of factors is poised to usher in a phase of robust expansion within the market, consequently shaping the landscape of IGRT adoption in the forthcoming forecasting years.

“LINAC (linear accelerator) segment to register largest market share in 2022-2028.”

Based on the product, the image-guided radiation therapy market is segmented into 4D gating/ 4D RT, LINAC (linear accelerator), PET/ MRI-guided radiation therapy, CT scanning and portal imaging. LINAC (linear accelerator) segment to register the largest market share over the forecast period of 2022-2028. The realm of LINAC technology is marked by continuous evolution, characterized by progressive innovations encompassing imaging modalities, dose delivery methodologies, and treatment validation approaches. This evolutionary trajectory significantly contributes to the perpetual advancement of image-guided radiation therapy (IGRT), thereby playing a pivotal role in amplifying its market presence and prominence.

“The Prostate cancer application segment to register highest CAGR over the forecast period of 2023-2028.”

Based on the application, the image-guided radiation therapy market is segmented into prostate cancer, lung cancer, head & neck cancer, breast cancer, gastrointestinal cancer, gynecological cancer, and other applications. The rising worldwide prevalence of prostate cancer has catalyzed a discernible surge in the need for advanced and effective treatment methodologies. Within this framework, image-guided radiation therapy (IGRT) assumes a pivotal stance, proffering meticulous tumor targeting founded on precision and augmenting therapeutic outcomes. This escalating requirement for elevated treatment sophistication seamlessly converges with the inherent attributes of IGRT, thereby substantiating its central position in propelling market expansion within the sphere of prostate cancer radiation therapy.

“The Stereotactic therapy procedure segment accounted for the highest CAGR of the image-guided radiation therapy market over the forecasting period.”

Based on the procedure, the image-guided radiation therapy market is segmented into 3D conformal therapy, IMRT, stereotactic therapy, particle therapy and proton beam therapy. The stereotactic therapy procedure segment exhibited the most substantial Compound Annual Growth Rate (CAGR) within the image-guided radiation therapy market over the projected forecasting period.

Stereotactic therapy possesses distinct qualities, notably its abbreviated treatment duration and elevated precision, which notably elevate the comfort levels of patients undergoing radiation therapy. This enhancement in the holistic treatment experience aligns seamlessly with the patient-centric philosophy that underscores image-guided radiation therapy (IGRT). The convergence of these attributes not only cultivates positive patient outcomes but also amplifies IGRT's appeal within the market landscape, consequently fostering heightened adoption rates and a more pronounced market presence.

“Hospitals’ segment to register for the largest market share of the image-guided radiation therapy market in 2022-2028.”

The major end users in the image-guided radiation therapy market are hospitals. The hospital end-user segment is estimated to hold a significant market share of the image-guided radiation therapy market during the forecast period. Hospitals, characterized by

their capacity to provide a comprehensive array of medical services within a singular facility, confer a distinctive convenience to patients undergoing image-guided radiation therapy (IGRT). This convenience stems from the consolidation of diverse medical needs under one roof, thereby mitigating the necessity for patients to seek multiple appointments at disparate venues. This strategic amalgamation of services not only streamlines patient care but also augments the attractiveness of IGRT as a preferred treatment option. As a result, this seamless alignment of convenience and comprehensive care significantly contributes to the advancement and prominence of the image-guided radiation therapy market within hospital settings.

Technological Advances: Hospitals frequently maintain cutting-edge infrastructure and technological capabilities essential for the successful integration of image-guided radiation therapy (IGRT), thus assuring the ready availability of requisite resources. This pivotal attribute distinctly contributes to the advancement and fortification of the image-guided radiation therapy market.

“Asia Pacific to register significant growth rate in the market during the forecast period.”

For the forecasting period 2023-2028, the APAC region is expected to register a significant growth rate in the market during the forecast period. Asia Pacific comprises India, China, Japan, Australia, South Korea, and RoAPAC. The Asia-Pacific (APAC) region has witnessed a significant increase in the market growth rate for image-guided radiation therapy. There are several drivers that contributed to this growth:

The maturing demographic profile observed in APAC countries accentuates the imperative for efficacious cancer treatment modalities characterized by minimized treatment-related adverse effects. This resonance with the precision-driven attributes of image-guided radiation therapy (IGRT) substantiates its pivotal role in enhancing the market landscape.

The incorporation of multilingual patient care offerings within APAC hospitals, combined with the accessibility to advanced treatments like image-guided radiation therapy (IGRT), confers a unique allure to the region, particularly among a diverse patient spectrum. This fusion of linguistic inclusiveness and state-of-the-art medical interventions significantly enhances the region's desirability as a favored healthcare destination, thereby fortifying its competitive position within the healthcare market landscape and concomitantly propelling the prominence of IGRT.

A breakdown of the primary participants referred to for this report is provided below:

Image-Guided Radiation Therapy Market by Product (4D RT, LINAC, MRI-guided radiotherapy, Portal CT Imaging), P...

By Company Type: Tier 1–40%, Tier 2–30%, and Tier 3– 30%

By Designation: C-level–27%, Director-level–18%, and Others–55%

By Region: North America–50%, Europe–20%, Asia Pacific–15%, Latin America–10%, and the Middle East & Africa–5%

Prominent players in this market are Siemens Healthineers AG (Germany), Elekta (Sweden), Accuray Incorporated (US), GE Healthcare Company (US), and Hitachi (Japan), among others.

Research Coverage

The report studies the image-guided radiation therapy market based on products, procedures, applications, end users, and regions.

The report analyzes factors (such as drivers, restraints, opportunities, and challenges) affecting the market growth.

The report evaluates the opportunities and challenges in the market for stakeholders and provides details of the competitive landscape for market leaders.

The report studies micro markets with respect to their growth trends, prospects, and contributions to the global image-guided radiation therapy market.

The report forecasts the revenue of market segments with respect to five major regions.

Key Benefits of Buying the Report:

The report will help the market leaders/new entrants/smaller firms in this market with investment evaluation viability within the image-guided radiation therapy market through a thorough analysis of comprehensive data, thereby facilitating robust risk assessment and enabling well-informed investment determinations. Benefit from meticulous market segmentation encompassing application, end-user, and regional dimensions, affording tailored insights for precise segment targeting. The report also provides an all-

encompassing evaluation of encapsulating pivotal trends, growth catalysts, challenges, and prospects, thereby empowering strategic decision-making with astute discernment.

The report provides insights on the following pointers:

Analysis of key drivers (increasing prevalence of cancer patient population, Increasing government initiatives for cancer management, advancements in non-invasive treatments through radiation therapy), restraints (Dearth of skilled radiologist/oncologist, high cost of image-guided radiation therapy treatment, Complexity of imaging technology for treatments), opportunities (Expansion of key players in emerging countries, Rising healthcare expenditure across developing countries), and challenges (Availability of alternative technology) influencing the growth of the image-guided radiation therapy market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the image-guided radiation therapy market.

Market Development: Comprehensive information about lucrative markets – the report analyses the image-guided radiation therapy market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the image-guided radiation therapy market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Siemens Healthineers AG (Germany), Elekta (Sweden), and Accuray Incorporated (US), among others.

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
 - 1.2.1 INCLUSIONS AND EXCLUSIONS
- 1.3 MARKET SCOPE
 - 1.3.1 MARKETS COVERED
 - 1.3.2 REGIONS COVERED
 - 1.3.3 YEARS CONSIDERED
 - 1.3.4 CURRENCY CONSIDERED
- 1.4 RESEARCH LIMITATIONS
- 1.5 MARKET STAKEHOLDERS
- 1.6 SUMMARY OF CHANGES
 - 1.6.1 RECESSION IMPACT

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 1 RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY RESEARCH

2.1.2.1 Primary sources

2.1.2.2 Key industry insights

2.1.2.3 Breakdown of primaries

FIGURE 2 BREAKDOWN OF PRIMARY INTERVIEWS: SUPPLY AND DEMAND-SIDE PARTICIPANTS

FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION

2.2 MARKET SIZE ESTIMATION

FIGURE 4 RESEARCH METHODOLOGY: HYPOTHESIS BUILDING

2.2.1 BOTTOM-UP APPROACH

2.2.1.1 Approach 1: Company revenue estimation approach

FIGURE 5 IMAGE-GUIDED RADIATION THERAPY MARKET SIZE ESTIMATION: APPROACH 1 (COMPANY REVENUE ESTIMATION)

2.2.1.2 Approach 2: Customer-based market estimation

FIGURE 6 IMAGE-GUIDED RADIATION THERAPY MARKET SIZE ESTIMATION:

BOTTOM-UP APPROACH

2.2.1.3 Approach 3: Top-down approach

2.2.1.4 Approach 4: Primary interviews

FIGURE 7 TOP-DOWN APPROACH

2.3 DATA TRIANGULATION AND MARKET BREAKDOWN

FIGURE 8 DATA TRIANGULATION METHODOLOGY

2.4 ASSUMPTIONS AND RISK ASSESSMENT

TABLE 1 IMAGE-GUIDED RADIATION THERAPY MARKET: ASSUMPTIONS

TABLE 2 IMAGE-GUIDED RADIATION THERAPY MARKET: LIMITATIONS

2.5 RECESSION IMPACT ANALYSIS

3 EXECUTIVE SUMMARY

FIGURE 9 IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2023 VS. 2028 (USD MILLION)

FIGURE 10 IMAGE-GUIDED RADIATION THERAPY MARKET, BY APPLICATION, 2023 VS. 2028 (USD MILLION)

FIGURE 11 IMAGE-GUIDED RADIATION THERAPY MARKET, BY PROCEDURE, 2023 VS. 2028 (USD MILLION)

FIGURE 12 IMAGE-GUIDED RADIATION THERAPY MARKET, BY END USER, 2023 VS. 2028 (USD MILLION)

FIGURE 13 IMAGE-GUIDED RADIATION THERAPY MARKET: GEOGRAPHICAL SNAPSHOT

4 PREMIUM INSIGHTS

4.1 IMAGE-GUIDED RADIATION THERAPY MARKET OVERVIEW

FIGURE 14 INCREASING CANCER PATIENT POPULATION AND GROWING NONINVASIVE CANCER TREATMENT TO DRIVE MARKET

4.2 REGIONAL MIX: IMAGE-GUIDED RADIATION THERAPY MARKET (2021–2028)

FIGURE 15 NORTH AMERICA TO DOMINATE MARKET THROUGHOUT FORECAST PERIOD

4.3 NORTH AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY COUNTRY AND END USER, 2022 (USD MILLION)

FIGURE 16 HOSPITALS DOMINATED IMAGE-GUIDED RADIATION THERAPY MARKET IN 2022

4.4 IMAGE-GUIDED RADIATION THERAPY MARKET, BY COUNTRY

FIGURE 17 MEXICO TO GROW AT HIGHEST RATE IN GLOBAL MARKET

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 18 IMAGE-GUIDED RADIATION THERAPY MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Rising adoption of radiotherapy for noninvasive cancer treatment

5.2.1.2 Rising cancer patient population

FIGURE 19 OVERVIEW OF CANCER PATIENT POPULATION: MALE VS. FEMALE

TABLE 3 RISE IN CANCER CASES, 2020 VS. 2025 VS. 2030

5.2.1.3 Initiatives and support for cancer management

5.2.2 RESTRAINTS

5.2.2.1 Complexity of imaging technology

5.2.2.2 Affordability and accessibility of treatment

5.2.3 OPPORTUNITIES

5.2.3.1 Expansion of key players in emerging economies

5.2.3.2 Rising healthcare expenditure across emerging economies

FIGURE 20 GOVERNMENT HEALTH EXPENDITURE AS % OF GENERAL GOVERNMENT EXPENDITURE (GGE)

5.2.4 CHALLENGES

5.2.4.1 Availability of alternatives to IGRT

5.2.4.2 Dearth of skilled personnel

5.3 PORTER'S FIVE FORCES ANALYSIS

TABLE 4 IMAGE-GUIDED RADIATION THERAPY MARKET: PORTER'S FIVE FORCES ANALYSIS

5.3.1 THREAT OF NEW ENTRANTS

5.3.2 THREAT OF SUBSTITUTES

5.3.3 BARGAINING POWER OF SUPPLIERS

5.3.4 BARGAINING POWER OF BUYERS

5.3.5 INTENSITY OF COMPETITIVE RIVALRY

5.4 ECOSYSTEM MAPPING

FIGURE 21 IMAGE-GUIDED RADIATION THERAPY MARKET: ECOSYSTEM MAP

5.5 VALUE CHAIN ANALYSIS

5.5.1 RESEARCH & DEVELOPMENT

5.5.2 PROCUREMENT AND PRODUCT DEVELOPMENT

5.5.3 MARKETING, SALES & DISTRIBUTION, AND POST-SALES SERVICES

FIGURE 22 IMAGE-GUIDED RADIATION THERAPY MARKET: VALUE CHAIN ANALYSIS

5.6 SUPPLY CHAIN ANALYSIS

5.6.1 PROMINENT COMPANIES

5.6.2 SMALL & MEDIUM-SIZED COMPANIES

5.6.3 END USERS

FIGURE 23 IMAGE-GUIDED RADIATION THERAPY MARKET: SUPPLY CHAIN ANALYSIS

5.7 REGULATORY ANALYSIS

5.7.1 US

TABLE 5 US: MEDICAL DEVICE REGULATORY APPROVAL PROCESS

5.7.2 EUROPE

5.7.3 JAPAN

TABLE 6 JAPAN: MEDICAL DEVICE CLASSIFICATION UNDER PMDA

5.8 REIMBURSEMENT SCENARIO

TABLE 7 CPT CODES FOR MAJOR AUTOMATED RADIATION THERAPY TREATMENT MODALITIES

TABLE 8 HEALTHCARE COMMON PROCEDURE CODING SYSTEM (HCPCS) CODES FOR IGRT

TABLE 9 REIMBURSEMENT FOR IMAGE-GUIDED RADIATION THERAPY PROCEDURES PER COURSE, 2021 VS. 2022

TABLE 10 FREESTANDING PER COURSE NATIONAL AVERAGE MEDICARE REIMBURSEMENT, 2021 VS. 2022

5.9 PRICING ANALYSIS

TABLE 11 PRICING ANALYSIS OF AUTOMATED RADIATION SYSTEMS (USD)

5.10 PATENT ANALYSIS

TABLE 12 IMPORT DATA FOR IMAGE-GUIDED RADIATION THERAPY (HS CODE 9022), BY COUNTRY, 2018–2022 (USD THOUSAND)

TABLE 13 EXPORT DATA FOR IMAGE-GUIDED RADIATION THERAPY (HS CODE 9018), BY COUNTRY, 2018–2022 (USD THOUSAND)

5.11 CASE STUDY

TABLE 14 CASE STUDY: ENABLING MR-GUIDED SBRT TREATMENTS FOR PROSTATE CANCER

5.12 KEY CONFERENCES AND EVENTS, 2023–2024

TABLE 15 IMAGE-GUIDED RADIATION THERAPY MARKET: DETAILED LIST OF KEY CONFERENCES AND EVENTS IN 2023–2024

5.13 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 24 EMERGING TRENDS AND OPPORTUNITIES AFFECTING FUTURE REVENUE MIX

5.14 KEY STAKEHOLDERS AND BUYING CRITERIA

5.14.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 25 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR IMAGE-GUIDED RADIATION THERAPY MARKET

TABLE 16 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR KEY PRODUCT SEGMENTS (%)

5.15 IMAGE-GUIDED RADIATION THERAPY MARKET: RECESSION IMPACT

6 IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE

6.1 INTRODUCTION

TABLE 17 IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

6.2 LINACS

6.2.1 LINACS TO HOLD LARGEST MARKET SHARE TILL 2028

TABLE 18 LINACS MARKET, BY REGION, 2020–2028 (USD MILLION)

TABLE 19 LINACS MARKET, BY PROCEDURE, 2020–2028 (USD MILLION)

TABLE 20 LINACS MARKET, BY APPLICATION, 2020–2028(USD MILLION)

TABLE 21 LINACS MARKET, BY END USER, 2020–2028 (USD MILLION)

6.3 CT SCANNING

6.3.1 GROWING NUMBER OF IMAGE-GUIDED AND MINIMALLY INVASIVE MEDICAL PROCEDURES TO BOOST MARKET

TABLE 22 CT SCANNING MARKET, BY REGION, 2020–2028 (USD MILLION)

TABLE 23 CT SCANNING MARKET, BY PROCEDURE, 2020–2028 (USD MILLION)

TABLE 24 CT SCANNING MARKET, BY APPLICATION, 2020–2028 (USD MILLION)

TABLE 25 CT SCANNING MARKET, BY END USER, 2020–2028 (USD MILLION)

6.4 PORTAL IMAGING

6.4.1 TRANSITION FROM MANUAL TO ROBOTIC TREATMENT TO SUPPORT MARKET GROWTH

TABLE 26 PORTAL IMAGING MARKET, BY REGION, 2020–2028 (USD MILLION)

TABLE 27 PORTAL IMAGING MARKET, BY PROCEDURE, 2020–2028 (USD MILLION)

TABLE 28 PORTAL IMAGING MARKET, BY APPLICATION, 2020–2028 (USD MILLION)

TABLE 29 PORTAL IMAGING MARKET, BY END USER, 2020–2028 (USD MILLION)

6.5 4D GATING/4D RADIATION THERAPY

6.5.1 RISING NUMBER OF CANCER TREATMENTS TO DRIVE MARKET

TABLE 30 4D GATING/4D RADIATION THERAPY MARKET, BY REGION, 2020–2028 (USD MILLION)

TABLE 31 4D GATING/4D RADIATION THERAPY MARKET, BY PROCEDURE, 2020–2028 (USD MILLION)

TABLE 32 4D GATING/4D RADIATION THERAPY MARKET, BY APPLICATION, 2020–2028 (USD MILLION)

TABLE 33 4D GATING/4D RADIATION THERAPY MARKET, BY END USER, 2020–2028 (USD MILLION)

6.6 PET/MRI-GUIDED RADIATION THERAPY

6.6.1 LARGE PATIENT POPULATION FOR CANCER TO DRIVE MARKET

TABLE 34 PET/MRI-GUIDED RADIATION THERAPY MARKET, BY REGION, 2020–2028 (USD MILLION)

TABLE 35 PET/MRI-GUIDED RADIATION THERAPY MARKET, BY PROCEDURE, 2020–2028 (USD MILLION)

TABLE 36 PET/MRI-GUIDED RADIATION THERAPY MARKET, BY APPLICATION, 2020–2028 (USD MILLION)

TABLE 37 PET/MRI-GUIDED RADIATION THERAPY MARKET, BY END USER, 2020–2028 (USD MILLION)

7 IMAGE-GUIDED RADIATION THERAPY MARKET, BY PROCEDURE

7.1 INTRODUCTION

TABLE 38 IMAGE-GUIDED RADIATION THERAPY MARKET, BY PROCEDURE, 2020–2028 (USD MILLION)

7.2 IMRT

7.2.1 IMRT TO HOLD LARGEST MARKET SHARE OVER FORECAST PERIOD

TABLE 39 IMRT MARKET, BY REGION, 2020–2028 (USD MILLION)

7.3 3D CONFORMAL RADIATION THERAPY

7.3.1 ADVANTAGES AND INCREASED ADOPTION OF RADIATION THERAPY TO BOOST ADOPTION

TABLE 40 3D CONFORMAL RADIATION THERAPY MARKET, BY REGION, 2020–2028 (USD MILLION)

7.4 STEREOTACTIC THERAPY

7.4.1 HIGH PRECISION AND EASE OF USE FOR SURGEONS TO DRIVE ADOPTION

TABLE 41 STEREOTACTIC THERAPY MARKET, BY REGION, 2020–2028 (USD MILLION)

7.5 PARTICLE THERAPY

7.5.1 GOVERNMENT SUPPORT TO BOOST NUMBER OF PARTICLE THERAPY CENTERS

TABLE 42 PARTICLE THERAPY MARKET, BY REGION, 2020–2028 (USD MILLION)

7.6 PROTON BEAM THERAPY

7.6.1 RISING ESTABLISHMENT OF PROTON THERAPY CANCER CENTERS TO

DRIVE MARKET

TABLE 43 PROTON BEAM THERAPY MARKET, BY REGION, 2020–2028 (USD MILLION)

8 IMAGE-GUIDED RADIATION THERAPY MARKET, BY APPLICATION

8.1 INTRODUCTION

TABLE 44 IMAGE-GUIDED RADIATION THERAPY MARKET, BY APPLICATION, 2020–2028 (USD MILLION)

8.2 BREAST CANCER

8.2.1 BREAST CANCER TO HOLD LARGEST SHARE OF APPLICATIONS MARKET

TABLE 45 IMAGE-GUIDED RADIATION THERAPY MARKET FOR BREAST CANCER, BY REGION, 2020–2028 (USD MILLION)

8.3 LUNG CANCER

8.3.1 RISING NUMBER OF CLINICAL TRIALS TO SUPPORT GROWTH

TABLE 46 IMAGE-GUIDED RADIATION THERAPY MARKET FOR LUNG CANCER, BY REGION, 2020–2028 (USD MILLION)

8.4 PROSTATE CANCER

8.4.1 PREFERENCE FOR NONINVASIVE TREATMENT TO BOOST GROWTH

TABLE 47 IMAGE-GUIDED RADIATION THERAPY MARKET FOR PROSTATE CANCER, BY REGION, 2020–2028 (USD MILLION)

8.5 HEAD & NECK CANCER

8.5.1 RISING AWARENESS OF BENEFITS OF NONINVASIVE TREATMENTS TO SUPPORT GROWTH

TABLE 48 IMAGE-GUIDED RADIATION THERAPY MARKET FOR HEAD & NECK CANCER, BY REGION, 2020–2028 (USD MILLION)

8.6 GYNECOLOGICAL CANCER APPLICATIONS

8.6.1 GROWING AWARENESS AND NEED FOR EARLY, EFFECTIVE TREATMENT TO SUPPORT ADOPTION

TABLE 49 IMAGE-GUIDED RADIATION THERAPY MARKET FOR GYNECOLOGICAL CANCER, BY REGION, 2020–2028(USD MILLION)

8.7 GASTROINTESTINAL CANCER

8.7.1 RISING GI CANCER INCIDENCE TO BOOST MARKET GROWTH

TABLE 50 IMAGE-GUIDED RADIATION THERAPY MARKET FOR GASTROINTESTINAL CANCER, BY REGION, 2020–2028 (USD MILLION)

8.8 OTHER APPLICATIONS

TABLE 51 IMAGE-GUIDED RADIATION THERAPY MARKET FOR OTHER APPLICATIONS, BY REGION, 2020–2028 (USD MILLION)

9 IMAGE-GUIDED RADIATION THERAPY MARKET, BY END USER

9.1 INTRODUCTION

TABLE 52 IMAGE-GUIDED RADIATION THERAPY MARKET, BY END USER, 2020–2028 (USD MILLION)

9.2 HOSPITALS

9.2.1 LARGE NUMBER OF SURGICAL AND DIAGNOSTIC PROCEDURES TO PROPEL MARKET

TABLE 53 IMAGE-GUIDED RADIATION THERAPY MARKET FOR HOSPITALS, BY REGION, 2020–2028 (USD MILLION)

9.3 INDEPENDENT RADIOTHERAPY CENTERS

9.3.1 LIMITED SURGICAL CAPABILITIES OF AVAILABLE PRODUCTS TO RESTRAIN ADOPTION

TABLE 54 IMAGE-GUIDED RADIATION THERAPY MARKET FOR INDEPENDENT RADIOTHERAPY CENTERS, BY REGION, 2020–2028 (USD MILLION)

10 IMAGE-GUIDED RADIATION THERAPY MARKET, BY REGION

10.1 INTRODUCTION

TABLE 55 IMAGE-GUIDED RADIATION THERAPY MARKET, BY REGION, 2020–2028 (USD MILLION)

10.2 NORTH AMERICA

10.2.1 NORTH AMERICA: RECESSION IMPACT

FIGURE 26 NORTH AMERICA: MARKET SNAPSHOT

TABLE 56 NORTH AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY COUNTRY, 2020–2028 (USD MILLION)

TABLE 57 NORTH AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

TABLE 58 NORTH AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY PROCEDURE, 2020–2028 (USD MILLION)

TABLE 59 NORTH AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY APPLICATION, 2020–2028 (USD MILLION)

TABLE 60 NORTH AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY END USER, 2020–2028 (USD MILLION)

10.2.2 US

10.2.2.1 US to dominate North American market

TABLE 61 US: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

10.2.3 CANADA

10.2.3.1 Rising cancer prevalence and growing awareness to drive market
TABLE 62 CANADA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY
TECHNIQUE, 2020–2028 (USD MILLION)

10.3 EUROPE

10.3.1 EUROPE: RECESSION IMPACT

TABLE 63 EUROPE: IMAGE-GUIDED RADIATION THERAPY MARKET, BY
COUNTRY, 2020–2028 (USD MILLION)

TABLE 64 EUROPE: IMAGE-GUIDED RADIATION THERAPY MARKET, BY
TECHNIQUE, 2020–2028 (USD MILLION)

TABLE 65 EUROPE: IMAGE-GUIDED RADIATION THERAPY MARKET, BY
PROCEDURE, 2020–2028 (USD MILLION)

TABLE 66 EUROPE: IMAGE-GUIDED RADIATION THERAPY MARKET, BY
APPLICATION, 2020–2028 (USD MILLION)

TABLE 67 EUROPE: IMAGE-GUIDED RADIATION THERAPY MARKET, BY END
USER, 2020–2028 (USD MILLION)

10.3.2 GERMANY

10.3.2.1 Germany to dominate market in Europe

TABLE 68 GERMANY: IMAGE-GUIDED RADIATION THERAPY MARKET, BY
TECHNIQUE, 2020–2028 (USD MILLION)

10.3.3 UK

10.3.3.1 High burden of cancer and large volume of radiation therapy procedures to
ensure demand

TABLE 69 UK: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE,
2020–2028 (USD MILLION)

10.3.4 FRANCE

10.3.4.1 Growth of French healthcare sector to support market growth

TABLE 70 FRANCE: IMAGE-GUIDED RADIATION THERAPY MARKET, BY
TECHNIQUE, 2020–2028 (USD MILLION)

10.3.5 ITALY

10.3.5.1 Increasing geriatric population to aid growth

TABLE 71 ITALY: IMAGE-GUIDED RADIATION THERAPY MARKET, BY
TECHNIQUE, 2020–2028 (USD MILLION)

10.3.6 SPAIN

10.3.6.1 Technological developments in healthcare sector to propel market

TABLE 72 SPAIN: IMAGE-GUIDED RADIATION THERAPY MARKET, BY
TECHNIQUE, 2020–2028 (USD MILLION)

10.3.7 REST OF EUROPE

TABLE 73 REST OF EUROPE: IMAGE-GUIDED RADIATION THERAPY MARKET, BY
TECHNIQUE, 2020–2028 (USD MILLION)

10.4 ASIA PACIFIC

10.4.1 ASIA PACIFIC: RECESSION IMPACT

FIGURE 27 ASIA PACIFIC: MARKET SNAPSHOT

TABLE 74 ASIA PACIFIC: IMAGE-GUIDED RADIATION THERAPY MARKET, BY COUNTRY, 2020–2028 (USD MILLION)

TABLE 75 ASIA PACIFIC: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

TABLE 76 ASIA PACIFIC: IMAGE-GUIDED RADIATION THERAPY MARKET, BY PROCEDURE, 2020–2028 (USD MILLION)

TABLE 77 ASIA PACIFIC: IMAGE-GUIDED RADIATION THERAPY MARKET, BY APPLICATION, 2020–2028 (USD MILLION)

TABLE 78 ASIA PACIFIC: IMAGE-GUIDED RADIATION THERAPY MARKET, BY END USER, 2020–2028 (USD MILLION)

10.4.2 JAPAN

10.4.2.1 Japan to hold largest share of APAC market

TABLE 79 JAPAN: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

10.4.3 CHINA

10.4.3.1 Growing prevalence of cancer and developing healthcare infrastructure to aid growth

TABLE 80 CHINA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

10.4.4 INDIA

10.4.4.1 Increasing target patient population and rising availability of advanced surgical treatments to drive market

TABLE 81 INDIA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

10.4.5 AUSTRALIA

10.4.5.1 Developing healthcare sector and increasing availability of advanced surgical treatments to favor market

TABLE 82 AUSTRALIA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

10.4.6 SOUTH KOREA

10.4.6.1 Growing target patient population to drive market

TABLE 83 SOUTH KOREA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

10.4.7 REST OF ASIA PACIFIC

TABLE 84 REST OF ASIA PACIFIC: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

10.5 LATIN AMERICA

10.5.1 LATIN AMERICA: RECESSION IMPACT

TABLE 85 LATIN AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY COUNTRY, 2020–2028 (USD MILLION)

TABLE 86 LATIN AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

TABLE 87 LATIN AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY PROCEDURE, 2020–2028 (USD MILLION)

TABLE 88 LATIN AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY APPLICATION, 2020–2028 (USD MILLION)

TABLE 89 LATIN AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY END USER, 2020–2028 (USD MILLION)

10.5.2 BRAZIL

10.5.2.1 Developing healthcare sector and increasing availability of advanced surgical treatments to boost market growth

TABLE 90 BRAZIL: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

10.5.3 MEXICO

10.5.3.1 Favorable government initiatives to drive market

TABLE 91 MEXICO: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

10.5.4 REST OF LATIN AMERICA

TABLE 92 REST OF LATIN AMERICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

10.6 MIDDLE EAST & AFRICA

10.6.1 INCREASING FOCUS OF MARKET PLAYERS ON MIDDLE EASTERN COUNTRIES TO PROPEL MARKET

10.6.2 MIDDLE EAST & AFRICA: RECESSION IMPACT

TABLE 93 MIDDLE EAST & AFRICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY TECHNIQUE, 2020–2028 (USD MILLION)

TABLE 94 MIDDLE EAST & AFRICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY PROCEDURE, 2020–2028 (USD MILLION)

TABLE 95 MIDDLE EAST & AFRICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY APPLICATION, 2020–2028 (USD MILLION)

TABLE 96 MIDDLE EAST & AFRICA: IMAGE-GUIDED RADIATION THERAPY MARKET, BY END USER, 2020–2028 (USD MILLION)

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW

11.2 KEY PLAYER STRATEGIES/RIGHT TO WIN

TABLE 97 OVERVIEW OF STRATEGIES ADOPTED BY PLAYERS IN IMAGE-GUIDED RADIATION THERAPY MARKET

11.3 REVENUE SHARE ANALYSIS

FIGURE 28 REVENUE SHARE ANALYSIS OF TOP PLAYERS IN IMAGE-GUIDED RADIATION THERAPY MARKET, 2018–2022 (USD BILLION)

11.4 MARKET RANKING ANALYSIS

FIGURE 29 IMAGE-GUIDED RADIATION THERAPY MARKET (2022)

11.5 COMPANY EVALUATION MATRIX FOR KEY PLAYERS (2022)

11.5.1 STARS

11.5.2 EMERGING LEADERS

11.5.3 PERVASIVE PLAYERS

11.5.4 PARTICIPANTS

FIGURE 30 IMAGE-GUIDED RADIATION THERAPY MARKET: COMPANY EVALUATION MATRIX FOR KEY PLAYERS, 2022

11.6 COMPANY EVALUATION MATRIX FOR STARTUPS/SMES (2022)

11.6.1 PROGRESSIVE COMPANIES

11.6.2 STARTING BLOCKS

11.6.3 RESPONSIVE COMPANIES

11.6.4 DYNAMIC COMPANIES

FIGURE 31 IMAGE-GUIDED RADIATION THERAPY MARKET: COMPANY EVALUATION MATRIX FOR STARTUPS/ SMES, 2022

11.7 COMPANY FOOTPRINT ANALYSIS

TABLE 98 TECHNIQUE AND REGIONAL FOOTPRINT ANALYSIS OF TOP PLAYERS IN IMAGE-GUIDED RADIATION THERAPY MARKET

TABLE 99 FOOTPRINT ANALYSIS OF COMPANIES, BY TECHNIQUE

TABLE 100 FOOTPRINT ANALYSIS OF COMPANIES, BY REGION

11.8 COMPETITIVE SCENARIOS AND TRENDS

TABLE 101 KEY PRODUCT LAUNCHES AND APPROVALS

TABLE 102 KEY DEALS

TABLE 103 OTHER KEY DEVELOPMENTS

12 COMPANY PROFILES

(Business overview, Products/Services/Solutions offered, Recent Developments, MNM view)*

12.1 KEY PLAYERS

12.1.1 SIEMENS HEALTHINEERS AG

TABLE 104 SIEMENS HEALTHINEERS AG: COMPANY OVERVIEW

FIGURE 32 SIEMENS AG: COMPANY SNAPSHOT (2022)

12.1.2 HITACHI

TABLE 105 HITACHI: COMPANY OVERVIEW

FIGURE 33 HITACHI: COMPANY SNAPSHOT (2022)

12.1.3 KONINKLIJKE PHILIPS

TABLE 106 KONINKLIJKE PHILIPS: COMPANY OVERVIEW

FIGURE 34 KONINKLIJKE PHILIPS: COMPANY SNAPSHOT (2022)

12.1.4 ELEKTA

TABLE 107 ELEKTA: COMPANY OVERVIEW

FIGURE 35 ELEKTA: COMPANY SNAPSHOT (2022)

12.1.5 ACCURAY INCORPORATED

TABLE 108 ACCURAY INCORPORATED: COMPANY OVERVIEW

FIGURE 36 ACCURAY INCORPORATED: COMPANY SNAPSHOT (2022)

12.1.6 CANON MEDICAL SYSTEMS CORPORATION

TABLE 109 CANON MEDICAL SYSTEMS CORPORATION: COMPANY OVERVIEW

FIGURE 37 CANON, INC.: COMPANY SNAPSHOT (2022)

12.1.7 C-RAD AB

TABLE 110 C-RAD: COMPANY OVERVIEW

FIGURE 38 C-RAD: COMPANY SNAPSHOT (2022)

12.1.8 VIEWRAY, INC.

TABLE 111 VIEWRAY, INC.: COMPANY OVERVIEW

FIGURE 39 VIEWRAY, INC.: COMPANY SNAPSHOT (2022)

12.1.9 IBA WORLDWIDE

TABLE 112 IBA: COMPANY OVERVIEW

FIGURE 40 IBA: COMPANY SNAPSHOT (2022)

12.1.10 VISION RT LTD.

TABLE 113 VISION RT LTD.: COMPANY OVERVIEW

12.1.11 PANACEA MEDICAL TECHNOLOGIES

TABLE 114 PANACEA MEDICAL TECHNOLOGIES: COMPANY OVERVIEW

12.1.12 MEVION MEDICAL SYSTEMS

TABLE 115 MEVION MEDICAL SYSTEMS: COMPANY OVERVIEW

12.1.13 GE HEALTHCARE

TABLE 116 GE HEALTHCARE: COMPANY OVERVIEW

FIGURE 41 GE HEALTHCARE: COMPANY SNAPSHOT (2022)

12.2 OTHER PLAYERS

12.2.1 REFLEXION

12.2.2 ASG SUPERCONDUCTORS

12.2.3 GALBINO TECHNOLOGY

12.2.4 IZI MEDICAL

12.2.5 XSTRAHL

12.2.6 AEP LINAC

*Details on Business overview, Products/Services/Solutions offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

13 APPENDIX

13.1 DISCUSSION GUIDE

13.2 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

13.3 CUSTOMIZATION OPTIONS

13.4 RELATED REPORTS

13.5 AUTHOR DETAILS

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