

# **Radiotherapy Market by Product (LINAC, CyberKnife, Gamma Knife, Tomotherapy, Particle Therapy, Cyclotron), Procedure (External (IMRT, IGRT, 3D-CRT) Internal (LDR, HDR)), Application (Prostate, Breast, Lung), End User (Hospitals) - Global Forecasts to 2026**

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## **Abstracts**

The global radiotherapy market is valued at USD 5.9 billion in 2021 and is expected to reach USD 7.3 billion by 2026, at a CAGR of 4.2% during the forecast period. The growth of this market is primarily driven by the rising burden of target diseases and increasing investments, funds, and grants for the development of novel products. Additionally, the growing adoption of radiotherapy procedures for cancer treatment, increasing use of particle therapy for cancer treatment, and the rising number of conferences and symposia focusing on the advancements in radiotherapy are some of the other major factors driving the growth of this market. However, the underdeveloped public health infrastructure in emerging countries, shortage of trained and skilled radiation oncologists, and the limited access to and affordability of various radiotherapy treatment options are the major factors that are expected to restrain the growth of this market during the forecast period.

“The prostate cancer segment, by application, accounted for the largest share of the external beam as well as internal beam radiotherapy market in 2020”

On the basis of application, the radiotherapy market is classified into two major segments—external beam radiotherapy and internal beam radiotherapy/brachytherapy applications. Based on indication, the external beam radiotherapy applications segment is further divided into prostate cancer, breast cancer, lung cancer, colorectal cancer, head and neck cancer (laryngeal cancer, hypopharyngeal cancer, oropharyngeal cancer, and oral cavity cancer), and other cancers (pancreatic cancer, brain cancer, and

gastrointestinal cancer, among others). The prostate cancer segment accounted for a significant share of both EBRT and brachytherapy market owing to the high and growing prevalence of prostate cancer and the positive outcomes for prostate cancer treatment using radiotherapy.

“The particle therapy segment of product, to register a significant growth rate amongst the external beam radiotherapy products, owing to new product launches and approvals”

On the basis of product, the radiotherapy market is segmented into external beam radiotherapy, internal beam radiotherapy/brachytherapy, and systemic radiotherapy products. The external beam radiotherapy products segment is further divided into linear accelerators, particle therapy systems, and conventional cobalt-60 teletherapy units. The internal beam radiotherapy/brachytherapy products segment includes seeds, applicators, afterloaders, and IORT systems, while the systemic radiotherapy segment includes iodine-131, samarium-153, rhenium-186, and other radioisotopes (Yttrium-90, Radium-223, Phosphorus-32, and Radio-labelled antibodies, among others). In 2020, the particle therapy segment accounted for the largest growth rate, mainly due to the growing prevalence of cancer, continuous product development, and launches during last three years. For instance, Varian launched the ProBeam 360° single-room proton therapy system in 2018 and introduced a multi-room configuration for the same product in 2019. Similarly, Mevion received FDA 510(k) clearance for the MEVION S250i Proton Therapy System, including the HYPERSCAN pencil beam scanning (PBS) technology, in January 2018.

“Increased installations and government initiatives to drive the segment growth of hospitals end user segment”

Based on end user, the radiotherapy market has been segmented into hospitals and independent radiotherapy centers. The hospitals segment accounted for the largest share of the radiotherapy market owing to the rising global prevalence of cancer, increasing installations of advanced radiotherapy equipment in developed as well as developing regions, increasing government initiatives aimed at equipping (or upgrading) hospitals with newer and advanced radiotherapy systems, and the increasing availability of funding for the adoption of advanced cancer treatment technologies. In 2021, Children's Hospital of Fudan University, Shanghai and Shanghai Fosun Healthcare (Group) Co., Ltd. (China) signed an agreement with Mevion Medical Systems to establish the first pediatric proton therapy center in China. Many more such recent developments will drive the market for hospital end user segment.

“The US market, by region, commanded the largest market share in 2020”

On the basis of region, the radiotherapy market is segmented into North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. The North America held the major share of the global radiotherapy market in 2020. The large share of the North American market can be attributed to factors such as the ongoing technological advancements, rising incidence of cancer, improving reimbursement scenario, and the rising focus of key players on strengthening their presence in the region.

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

By Company Type: Tier 1–45%, Tier 2–34%, and Tier 3– 21%

By Designation: C-level–47%, Director-level–33%, and Others–20%

By Region: North America–35%, Europe–32%, Asia Pacific–25%, Latin America–6%, and the Middle East & Africa–2%

The dominant players in the global radiotherapy market are Varian Medical Systems, Inc. (US), Elekta (Sweden) Accuray Incorporated (US), Ion Beam Applications SA (Belgium), BD (US), Eckert & Ziegler (Germany), Hitachi Ltd. (Japan), ICAD, Inc. (US), IntraOp Medical, Inc. (US), IsoRay Medical, Inc. (US), Mevion Medical Systems, Inc. (US), Panacea Medical Technologies Pvt. Ltd. (India), P-cure Ltd. (Israel), ViewRay, Inc. (US), and ZEISS Group (Germany), among others.

## Research Coverage

This report studies the radiotherapy market based on product, procedure, application, end user, and region. It also covers the factors affecting market growth, analyzes the various opportunities and challenges in the market, and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micromarkets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to five main regions (and the respective countries in these regions).

## Reasons to Buy the Report

The report will enable established firms as well as entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them to garner a larger market share. Firms purchasing the report could use one or a combination of the below-mentioned strategies for strengthening their market presence.

This report provides insights on the following pointers:

**Market Penetration:**Comprehensive information on the product portfolios offered by the top players in the radiotherapymarket

**Product Development/Innovation:**Detailed insights on the upcoming trends, R&D activities, and product launches in the radiotherapymarket

**Market Development:**Comprehensive information on lucrative emerging regions

**Market Diversification:**Exhaustive information about new products, growing geographies, and recent developments in the radiotherapymarket

**Competitive Assessment:**In-depth assessment of market segments, growth strategies, revenue analysis, and products of the leading market players.

## Contents

### 1 INTRODUCTION

- 1.1 OBJECTIVES OF THE STUDY
- 1.2 MARKET DEFINITION
  - 1.2.1 INCLUSIONS & EXCLUSIONS
- 1.3 STUDY SCOPE
  - 1.3.1 MARKETS COVERED
  - 1.3.2 YEARS CONSIDERED FOR THE STUDY
- 1.4 CURRENCY USED FOR THE STUDY
- 1.5 MARKET STAKEHOLDERS
- 1.6 SUMMARY OF CHANGES

### 2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
  - FIGURE 1 RESEARCH DESIGN
    - 2.1.1 SECONDARY DATA
    - 2.1.2 PRIMARY DATA
  - FIGURE 2 BREAKDOWN OF PRIMARIES: RADIOTHERAPY MARKET
- 2.2 MARKET ESTIMATION METHODOLOGY
  - FIGURE 3 RESEARCH METHODOLOGY: HYPOTHESIS BUILDING
    - 2.2.1 REVENUE MAPPING-BASED MARKET ESTIMATION
    - 2.2.2 USAGE-BASED MARKET ESTIMATION
  - FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: GLOBAL RADIOTHERAPY MARKET
    - 2.2.3 PRIMARY RESEARCH VALIDATION
- 2.3 DATA TRIANGULATION
  - FIGURE 5 DATA TRIANGULATION
- 2.4 RESEARCH ASSUMPTIONS
- 2.5 RESEARCH LIMITATIONS

### 3 EXECUTIVE SUMMARY

- FIGURE 6 RADIOTHERAPY MARKET, BY PRODUCT, 2021 VS. 2026 (USD MILLION)
- FIGURE 7 EXTERNAL BEAM RADIOTHERAPY MARKET, BY APPLICATION, 2021 VS. 2026 (USD MILLION)
- FIGURE 8 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY

*Radiotherapy Market by Product (LINAC, CyberKnife, Gamma Knife, Tomotherapy, Particle Therapy, Cyclotron), Pro...*

PROCEDURE, 2021 VS. 2026 (USD MILLION)

FIGURE 9 RADIOTHERAPY MARKET SHARE, BY END USER, 2021 VS. 2026

FIGURE 10 GEOGRAPHICAL SNAPSHOT OF THE RADIOTHERAPY MARKET

## **4 PREMIUM INSIGHTS**

### **4.1 RADIOTHERAPY MARKET OVERVIEW**

FIGURE 11 RISING CANCER PREVALENCE ACROSS THE GLOBE TO DRIVE THE GROWTH OF THE RADIOTHERAPY MARKET

### **4.2 EUROPE: EXTERNAL BEAM RADIOTHERAPY MARKET, BY PRODUCT AND REGION**

FIGURE 12 LINER ACCELERATORS SEGMENT TO ACCOUNT FOR THE LARGEST SHARE

OF THE EUROPEAN MARKET

### **4.3 NORTH AMERICA: INTERNAL BEAM RADIOTHERAPY MARKET, BY APPLICATION, 2021 VS. 2026 (USD MILLION)**

FIGURE 13 PROSTATE CANCER TREATMENT IS THE LARGEST APPLICATION OF INTERNAL BEAM RADIOTHERAPY IN NORTH AMERICA

### **4.4 GEOGRAPHIC SNAPSHOT OF THE RADIOTHERAPY MARKET**

FIGURE 14 CHINA TO REGISTER THE HIGHEST CAGR DURING THE FORECAST PERIOD

## **5 MARKET OVERVIEW**

### **5.1 INTRODUCTION**

### **5.2 MARKET DYNAMICS**

FIGURE 15 RADIOTHERAPY MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

#### **5.2.1 DRIVERS**

5.2.1.1 Technological advancements

5.2.1.2 Expansion of the target patient population

5.2.1.3 Increasing number of conferences and symposia focusing on spreading awareness about the benefits of radiotherapy

5.2.1.4 Growing use of particle therapy for cancer treatment

#### **5.2.2 KEY MARKET RESTRAINTS**

5.2.2.1 Lack of adequate healthcare infrastructure

5.2.2.2 Shortage of skilled oncologists/radiologists

5.2.2.3 Affordability and accessibility of treatment

5.2.2.4 Complex nature of radiotherapy

### 5.2.3 KEY MARKET OPPORTUNITIES

5.2.3.1 Rising healthcare expenditure across developing countries

5.2.3.2 Growing government and private investments to meet the increasing demand for cancer treatment

### 5.2.4 CHALLENGES

5.2.4.1 Difficulties in visualizing tumors during radiotherapy procedures

5.2.4.2 Risk of radiation exposure

## 5.3 PORTER'S FIVE FORCES ANALYSIS

### 5.3.1 OVERVIEW

TABLE 1 RADIOTHERAPY MARKET: PORTER'S FIVE FORCES ANALYSIS

### 5.3.2 THREAT OF NEW ENTRANTS

FIGURE 16 THREAT OF NEW ENTRANTS

### 5.3.3 THREAT OF SUBSTITUTES

FIGURE 17 THREAT OF SUBSTITUTES

### 5.3.4 BARGAINING POWER OF SUPPLIERS

FIGURE 18 BARGAINING POWER OF SUPPLIERS

### 5.3.5 BARGAINING POWER OF BUYERS

FIGURE 19 BARGAINING POWER OF BUYERS

### 5.3.6 DEGREE OF COMPETITION

FIGURE 20 DEGREE OF COMPETITION

## 5.4 REGULATORY SCENARIO

### 5.4.1 US

TABLE 2 US: MEDICAL DEVICE REGULATORY APPROVAL PROCESS

### 5.4.2 EUROPE

### 5.4.3 JAPAN

TABLE 3 JAPAN: MEDICAL DEVICE CLASSIFICATION UNDER PMDA

### 5.4.4 EMERGING COUNTRIES

## 5.5 REIMBURSEMENT SCENARIO

TABLE 4 REIMBURSEMENT CODES FOR RADIOTHERAPY AND RELATED PROCEDURES

## 5.6 ECOSYSTEM COVERAGE

## 5.7 VALUE CHAIN ANALYSIS

## 5.8 COVID-19 IMPACT ON THE RADIOTHERAPY MARKET

## 5.9 PRICING ANALYSIS

## 5.10 PATENT ANALYSIS

### 5.10.1 PATENT DETAILS

FIGURE 21 PATENT ANALYSIS, JANUARY 2011–MARCH 2021

# 6 RADIOTHERAPY MARKET, BY PRODUCT



## 6.1 INTRODUCTION

TABLE 5 RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

## 6.2 EXTERNAL BEAM RADIOTHERAPY PRODUCTS

TABLE 6 EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 7 EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY REGION, 2019–2026 (USD MILLION)

### 6.2.1 LINEAR ACCELERATORS

TABLE 8 LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 9 LINEAR ACCELERATORS MARKET, BY REGION, 2019–2026 (USD MILLION)

### 6.2.2 CONVENTIONAL LINEAR ACCELERATORS

6.2.2.1 Lower equipment and maintenance cost will drive the market for conventional LINACs

TABLE 10 CONVENTIONAL LINEAR ACCELERATORS MARKET, BY REGION, 2019–2026 (USD MILLION)

### 6.2.3 STEREOTACTIC ADVANCED ELECTRON/COBALT-60 LINEAR ACCELERATORS

TABLE 11 STEREOTACTIC ADVANCED ELECTRON/COBALT-60 LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 12 STEREOTACTIC ADVANCED ELECTRON/COBALT-60 LINEAR ACCELERATORS MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 6.2.3.1 Cyberknife

6.2.3.1.1 CyberKnife offers a precise radiation delivery method with specialized tracking and robotic correction capabilities

TABLE 13 CYBERKNIFE MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 6.2.3.2 Gamma knife

6.2.3.2.1 Gamma Knife offers promising results for brain metastasis patients

TABLE 14 GAMMA KNIFE MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 6.2.3.3 Tomotherapy

6.2.3.3.1 Continuous product development and launches adding to the growth prospects of this market segment

TABLE 15 TOMOTHERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

### 6.2.4 PARTICLE THERAPY SYSTEMS

TABLE 16 PARTICLE THERAPY SYSTEMS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 17 PARTICLE THERAPY SYSTEMS MARKET, BY REGION, 2019–2026 (USD



MILLION)

#### 6.2.4.1 Cyclotrons

6.2.4.1.1 Leading players in the particle therapy market mainly manufacture cyclotrons

TABLE 18 CYCLOTRONS MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 6.2.4.2 Synchrotrons

6.2.4.2.1 Increasing investments for the development of synchrotron facilities are contributing to market growth

TABLE 19 SYNCHROTRONS MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 6.2.4.3 Synchrocyclotrons

6.2.4.3.1 High space requirements of synchrocyclotrons are limiting their widespread adoption

TABLE 20 SYNCHROCYCLOTRONS MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 6.2.5 CONVENTIONAL COBALT-60 TELETHERAPY UNITS

6.2.5.1 High cost and risk of radiation exposure with cobalt-60 radio isotopes have hindered the growth of this segment

TABLE 21 CONVENTIONAL COBALT-60 TELETHERAPY UNITS MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 6.3 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS

TABLE 22 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 23 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY REGION, 2019–2026 (USD MILLION)

##### 6.3.1 SEEDS

6.3.1.1 Adverse side-effects associated with seeds limit their adoption

TABLE 24 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY SEEDS MARKET, BY REGION, 2019–2026 (USD MILLION)

##### 6.3.2 APPLICATORS

6.3.2.1 Manual applicators pose a high risk of radiation exposure to the patients and staff

TABLE 25 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY APPLICATORS MARKET, BY REGION, 2019–2026 (USD MILLION)

##### 6.3.3 AFTERLOADERS

6.3.3.1 Modern afterloaders offer proper positioning and better control of isotopes inside the body of patients

TABLE 26 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY AFTERLOADERS MARKET, BY REGION, 2019–2026 (USD MILLION)

##### 6.3.4 IORT SYSTEMS

6.3.4.1 Growing adoption of electronic brachytherapy procedures to support the growth of this market segment

TABLE 27 IORT SYSTEMS MARKET, BY REGION, 2019–2026 (USD MILLION)

## 6.4 SYSTEMIC RADIOTHERAPY

6.4.1 IOBENGUANE (I-131)

6.4.2 SAMARIUM-153

6.4.3 RHENIUM-186

6.4.4 OTHER SYSTEMIC RADIOTHERAPY PRODUCTS

## 7 RADIOTHERAPY MARKET, BY APPLICATION

### 7.1 INTRODUCTION

TABLE 28 RADIOTHERAPY MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

### 7.2 EXTERNAL BEAM RADIOTHERAPY APPLICATIONS

TABLE 29 EXTERNAL BEAM RADIOTHERAPY APPLICATIONS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 30 EXTERNAL BEAM RADIOTHERAPY APPLICATIONS MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 7.2.1 PROSTATE CANCER

7.2.1.1 High incidence rate and efficiency of EBRT for prostate cancer treatment to drive the growth of this market segment

TABLE 31 EXTERNAL BEAM RADIOTHERAPY MARKET FOR PROSTATE CANCER, BY REGION, 2019–2026 (USD MILLION)

#### 7.2.2 BREAST CANCER

7.2.2.1 Therapeutic benefits of EBRT for breast cancer over other treatments to drive the growth of this market segment

TABLE 32 EXTERNAL BEAM RADIOTHERAPY MARKET FOR BREAST CANCER, BY REGION, 2019–2026 (USD MILLION)

#### 7.2.3 LUNG CANCER

7.2.3.1 Radiotherapy can be used as an adjuvant therapy with surgical procedures or chemotherapy or as a curative therapy for lung cancer

TABLE 33 EXTERNAL BEAM RADIOTHERAPY MARKET FOR LUNG CANCER, BY REGION, 2019–2026 (USD MILLION)

#### 7.2.4 HEAD & NECK CANCER

7.2.4.1 Benefits of EBRT will increase its use in head and neck cancer treatment

TABLE 34 EXTERNAL BEAM RADIOTHERAPY MARKET FOR HEAD & NECK CANCER, BY REGION, 2019–2026 (USD MILLION)

#### 7.2.5 COLORECTAL CANCER

7.2.5.1 Availability of alternative therapeutic options to limit the growth of this market segment

TABLE 35 EXTERNAL BEAM RADIOTHERAPY MARKET FOR COLORECTAL CANCER, BY REGION, 2019–2026 (USD MILLION)

#### 7.2.6 OTHER CANCERS

TABLE 36 EXTERNAL BEAM RADIOTHERAPY MARKET FOR OTHER CANCERS, BY REGION, 2019–2026 (USD MILLION)

### 7.3 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY APPLICATIONS

TABLE 37 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY APPLICATIONS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 38 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY APPLICATIONS MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 7.3.1 PROSTATE CANCER

7.3.1.1 Precision and rapidity of brachytherapy in prostate cancer treatment to drive the growth of this market segment

TABLE 39 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET FOR PROSTATE CANCER, BY REGION, 2019–2026 (USD MILLION)

#### 7.3.2 GYNECOLOGICAL CANCER

7.3.2.1 Availability of alternatives to hinder the adoption of brachytherapy in gynecological cancer treatment

TABLE 40 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET FOR GYNECOLOGICAL CANCER, BY REGION, 2019–2026 (USD MILLION)

#### 7.3.3 BREAST CANCER

7.3.3.1 Precision and rapidity of brachytherapy treatment are driving its use in breast cancer applications

TABLE 41 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET FOR BREAST CANCER, BY REGION, 2019–2026 (USD MILLION)

#### 7.3.4 CERVICAL CANCER

7.3.4.1 Brachytherapy is an important part of the treatment of cervical cancer patients when radiation therapy is the primary choice of curative treatment

TABLE 42 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET FOR CERVICAL CANCER, BY REGION, 2019–2026 (USD MILLION)

#### 7.3.5 PENILE CANCER

7.3.5.1 Interstitial brachytherapy is the standard conservative therapy for localized penile cancer

TABLE 43 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET FOR PENILE CANCER, BY REGION, 2019–2026 (USD MILLION)

#### 7.3.6 OTHER CANCERS

TABLE 44 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET FOR

OTHER CANCERS, BY REGION, 2019–2026 (USD MILLION)

## **8 RADIOTHERAPY MARKET, BY PROCEDURE**

### **8.1 INTRODUCTION**

TABLE 45 RADIOTHERAPY MARKET, BY PROCEDURE, 2019–2026 (USD MILLION)

### **8.2 EXTERNAL BEAM RADIOTHERAPY**

TABLE 46 EXTERNAL BEAM RADIOTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 47 EXTERNAL BEAM RADIOTHERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

### **8.3 IMAGE-GUIDED RADIOTHERAPY**

TABLE 48 IMAGE-GUIDED RADIOTHERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

#### **8.3.1 INTENSITY-MODULATED RADIOTHERAPY**

8.3.1.1 The radiation intensity of each beam in IMRT is controlled, and the beam shape changes throughout each treatment.

TABLE 49 INTENSITY-MODULATED RADIOTHERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

#### **8.3.2 3D CONFORMAL RADIOTHERAPY**

8.3.2.1 Multiple beams with 3D-CRT allow precise radiation conforming to the tumor shape and size

TABLE 50 3D CONFORMAL RADIOTHERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

#### **8.3.3 STEREOTACTIC THERAPY**

8.3.3.1 Stereotactic therapy offers a minimally invasive alternative to ablation surgeries

TABLE 51 STEREOTACTIC THERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

#### **8.3.4 PARTICLE THERAPY**

8.3.4.1 Adoption of particle therapy as the primary mode of cancer treatment is increasing

TABLE 52 PARTICLE THERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

### **8.4 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY**

TABLE 53 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 54 INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

#### **8.4.1 HIGH-DOSE-RATE BRACHYTHERAPY**

8.4.1.1 Electronic brachytherapy is one of the recent advancements in this technique

TABLE 55 HIGH-DOSE-RATE BRACHYTHERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 8.4.2 LOW-DOSE-RATE BRACHYTHERAPY

8.4.2.1 Lower risk of radiation exposure to the surrounding tissues to support the growth of this market segment

TABLE 56 LOW-DOSE-RATE BRACHYTHERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

#### 8.4.3 PULSED-DOSE-RATE BRACHYTHERAPY

8.4.3.1 Pulsed-dose-rate brachytherapy combines the advantages of HDR and LDR brachytherapy

TABLE 57 PULSED-DOSE-RATE BRACHYTHERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

### 8.5 SYSTEMIC RADIOTHERAPY

#### 8.5.1 INTRAVENOUS RADIOTHERAPY

#### 8.5.2 ORAL RADIOTHERAPY

#### 8.5.3 INSTILLATION RADIOTHERAPY

## 9 RADIOTHERAPY MARKET, BY END USER

### 9.1 INTRODUCTION

TABLE 58 RADIOTHERAPY MARKET, BY END USER, 2019–2026 (USD MILLION)

#### 9.2 HOSPITALS

9.2.1 INCREASING NUMBER OF SUPPLY DEALS OF ADVANCED RADIOTHERAPY PRODUCTS BETWEEN COMPANIES AND HOSPITALS TO DRIVE MARKET GROWTH

TABLE 59 RADIOTHERAPY MARKET FOR HOSPITALS, BY REGION, 2019–2026 (USD MILLION)

#### 9.3 INDEPENDENT RADIOTHERAPY CENTERS

9.3.1 RISING CONSOLIDATION OF HEALTHCARE NETWORKS IS CHALLENGING THE GROWTH OF FREE-STANDING RADIOTHERAPY CENTERS

TABLE 60 RADIOTHERAPY MARKET FOR INDEPENDENT RADIOTHERAPY CENTERS, BY REGION, 2019–2026 (USD MILLION)

## 10 RADIOTHERAPY MARKET, BY REGION

### 10.1 INTRODUCTION

TABLE 61 RADIOTHERAPY MARKET, BY REGION, 2019–2026 (USD MILLION)

## 10.2 NORTH AMERICA

### FIGURE 22 NORTH AMERICA: RADIOTHERAPY MARKET SNAPSHOT

TABLE 62 NORTH AMERICA: RADIOTHERAPY MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 63 NORTH AMERICA: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 64 NORTH AMERICA: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 65 NORTH AMERICA: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 66 NORTH AMERICA: STEREOTACTIC ADVANCED ELECTRON/COBALT-60 LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 67 NORTH AMERICA: PARTICLE THERAPY SYSTEMS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 68 NORTH AMERICA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 69 NORTH AMERICA: EXTERNAL BEAM RADIOTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 70 NORTH AMERICA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 71 NORTH AMERICA: EXTERNAL BEAM RADIOTHERAPY MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 72 NORTH AMERICA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 73 NORTH AMERICA: RADIOTHERAPY MARKET, BY END USER, 2019–2026 (USD MILLION)

### 10.2.1 US

10.2.1.1 Changes in the reimbursement scenario to drive market growth in the US

TABLE 74 US: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 75 US: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 76 US: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 77 US: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS



**MARKET, BY TYPE, 2019–2026 (USD MILLION)****10.2.2 CANADA**

10.2.2.1 Increasing incidence of cancer to drive market growth in Canada

TABLE 78 CANADA: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 79 CANADA: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 80 CANADA: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 81 CANADA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

**10.3 EUROPE**

TABLE 82 EUROPE: RADIOTHERAPY MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 83 EUROPE: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 84 EUROPE: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 85 EUROPE: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 86 EUROPE: STEREOTACTIC ADVANCED ELECTRON/COBALT-60 LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 87 EUROPE: PARTICLE THERAPY SYSTEMS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 88 EUROPE: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 89 EUROPE: EXTERNAL BEAM RADIOTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 90 EUROPE: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 91 EUROPE: EXTERNAL BEAM RADIOTHERAPY MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 92 EUROPE: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 93 EUROPE: RADIOTHERAPY MARKET, BY END USER, 2019–2026 (USD MILLION)

**10.3.1 GERMANY**

10.3.1.1 Germany is the largest market for radiotherapy in Europe

TABLE 94 GERMANY: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD



MILLION)

TABLE 95 GERMANY: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 96 GERMANY: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 97 GERMANY: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.3.2 FRANCE

10.3.2.1 High healthcare expenditure in France to drive market growth

TABLE 98 FRANCE: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 99 FRANCE: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 100 FRANCE: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 101 FRANCE: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.3.3 UK

10.3.3.1 Increasing prevalence of cancer to drive market growth in the UK

TABLE 102 UK: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 103 UK: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 104 UK: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 105 UK: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.3.4 SPAIN

10.3.4.1 Increasing number of conferences and government funding for cancer research to drive market growth in Spain

TABLE 106 SPAIN: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 107 SPAIN: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 108 SPAIN: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 109 SPAIN: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.3.5 ITALY

#### 10.3.5.1 Increasing awareness activities to support market growth

TABLE 110 ITALY: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 111 ITALY: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 112 ITALY: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 113 ITALY: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.3.6 REST OF EUROPE

TABLE 114 ROE: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 115 ROE: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 116 ROE: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 117 ROE: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.4 ASIA PACIFIC

FIGURE 23 ASIA PACIFIC: RADIOTHERAPY MARKET SNAPSHOT

TABLE 118 ASIA PACIFIC: RADIOTHERAPY MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 119 ASIA PACIFIC: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 120 ASIA PACIFIC: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 121 ASIA PACIFIC: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 122 ASIA PACIFIC: STEREOTACTIC ADVANCED ELECTRON/COBALT-60 LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 123 ASIA PACIFIC: PARTICLE THERAPY SYSTEMS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 124 ASIA PACIFIC: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 125 ASIA PACIFIC: EXTERNAL BEAM RADIOTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 126 ASIA PACIFIC: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 127 ASIA PACIFIC: EXTERNAL BEAM RADIOTHERAPY MARKET, BY

APPLICATION, 2019–2026 (USD MILLION)

TABLE 128 ASIA PACIFIC: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 129 ASIA PACIFIC: RADIOTHERAPY MARKET, BY END USER, 2019–2026 (USD MILLION)

#### 10.4.1 JAPAN

10.4.1.1 Rising geriatric population and subsequent increase in the prevalence of cancer to drive market growth in Japan

TABLE 130 JAPAN: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 131 JAPAN: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 132 JAPAN: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 133 JAPAN: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.4.2 CHINA

10.4.2.1 Increasing number of strategic partnerships and supply deals to drive market growth

TABLE 134 CHINA: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 135 CHINA: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 136 CHINA: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 137 CHINA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.4.3 INDIA

10.4.3.1 High need for radiotherapy systems in the country is expected to offer growth opportunities to market players

TABLE 138 INDIA: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 139 INDIA: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 140 INDIA: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 141 INDIA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.4.4 SOUTH KOREA

#### 10.4.4.1 Increasing incidence of cancer to drive market growth in South Korea

TABLE 142 SOUTH KOREA: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 143 SOUTH KOREA: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 144 SOUTH KOREA: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 145 SOUTH KOREA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.4.5 AUSTRALIA

##### 10.4.5.1 Increasing prevalence of cancer to drive market growth in Australia

TABLE 146 AUSTRALIA: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 147 AUSTRALIA: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 148 AUSTRALIA: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 149 AUSTRALIA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.4.6 REST OF ASIA PACIFIC

TABLE 150 ROAPAC: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 151 ROAPAC: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 152 ROAPAC: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 153 ROAPAC: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.5 LATIN AMERICA

TABLE 154 LATIN AMERICA: RADIOTHERAPY MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 155 LATIN AMERICA: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 156 LATIN AMERICA: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 157 LATIN AMERICA: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 158 LATIN AMERICA: STEREOTACTIC ADVANCED ELECTRON/COBALT-60 LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 159 LATIN AMERICA: PARTICLE THERAPY SYSTEMS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 160 LATIN AMERICA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 161 LATIN AMERICA: EXTERNAL BEAM RADIOTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 162 LATIN AMERICA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 163 LATIN AMERICA: EXTERNAL BEAM RADIOTHERAPY MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 164 LATIN AMERICA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 165 LATIN AMERICA: RADIOTHERAPY MARKET, BY END USER, 2019–2026 (USD MILLION)

#### 10.5.1 BRAZIL

10.5.1.1 Increasing cancer incidence to drive market growth in Brazil

TABLE 166 BRAZIL: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 167 BRAZIL: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 168 BRAZIL: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 169 BRAZIL: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.5.2 MEXICO

10.5.2.1 Increasing awareness programs fueling market growth in Mexico

TABLE 170 MEXICO: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 171 MEXICO: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 172 MEXICO: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 173 MEXICO: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 10.5.3 REST OF LATIN AMERICA

TABLE 174 ROLA: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD

MILLION)

TABLE 175 ROLA: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 176 ROLA: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 177 ROLA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

## 10.6 MIDDLE EAST & AFRICA

10.6.1 IMPROVING HEALTHCARE INFRASTRUCTURE AND INCREASING PUBLIC-PRIVATE INVESTMENTS TO DRIVE MARKET GROWTH IN THE MEA

TABLE 178 MEA: RADIOTHERAPY MARKET, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 179 MEA: EXTERNAL BEAM RADIOTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 180 MEA: LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 181 MEA: STEREOTACTIC ADVANCED ELECTRON/COBALT-60 LINEAR ACCELERATORS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 182 MEA: PARTICLE THERAPY SYSTEMS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 183 MEA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY PRODUCTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 184 MEA: EXTERNAL BEAM RADIOTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 185 MEA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 186 MEA: EXTERNAL BEAM RADIOTHERAPY MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 187 MEA: INTERNAL BEAM RADIOTHERAPY/BRACHYTHERAPY MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 188 MEA: RADIOTHERAPY MARKET, BY END USER, 2019–2026 (USD MILLION)

## 11 COMPETITIVE LANDSCAPE

### 11.1 OVERVIEW

FIGURE 24 KEY DEVELOPMENTS IN THE RADIOTHERAPY MARKET (JANUARY 2018 TO MAY 2021)

### 11.2 MARKET SHARE ANALYSIS



11.2.1 GLOBAL RADIOTHERAPY MARKET SHARE ANALYSIS (2020)  
FIGURE 25 GLOBAL RADIOTHERAPY MARKET SHARE ANALYSIS, BY KEY  
PLAYER (2020)

11.3 COMPANY EVALUATION QUADRANT

11.3.1 STARS

11.3.2 EMERGING LEADERS

11.3.3 PERVASIVE PLAYERS

11.3.4 PARTICIPANTS

FIGURE 26 RADIOTHERAPY MARKET: COMPETITIVE LEADERSHIP MAPPING  
(2020)

FIGURE 27 RADIOTHERAPY MARKET: COMPETITIVE LEADERSHIP MAPPING  
FOR SMES/START-UPS (2020)

11.4 COMPETITIVE SCENARIO

11.4.1 PRODUCT LAUNCHES AND APPROVALS

TABLE 189 RADIOTHERAPY MARKET: KEY PRODUCT LAUNCHES AND  
APPROVALS, JANUARY 2018 TO MAY 2021

11.4.2 EXPANSIONS

TABLE 190 RADIOTHERAPY MARKET: KEY EXPANSIONS, JANUARY 2018 TO MAY  
2021

11.4.3 DEALS

TABLE 191 RADIOTHERAPY MARKET: KEY DEALS, JANUARY 2018 TO MAY 2021

## **12 COMPANY PROFILES**

12.1 KEY PLAYERS

(Business Overview, Products Offered, Recent Developments, MnM view)\*

12.1.1 VARIAN MEDICAL SYSTEMS, INC.

TABLE 192 VARIAN MEDICAL SYSTEMS, INC.: BUSINESS OVERVIEW

FIGURE 28 VARIAN MEDICAL SYSTEMS, INC.: COMPANY SNAPSHOT

12.1.2 ELEKTA AB

TABLE 193 ELEKTA AB: BUSINESS OVERVIEW

FIGURE 29 ELEKTA AB: COMPANY SNAPSHOT

12.1.3 ACCURAY INCORPORATED

TABLE 194 ACCURAY INCORPORATED: BUSINESS OVERVIEW

FIGURE 30 ACCURAY INCORPORATED: COMPANY SNAPSHOT

12.1.4 BECTON, DICKINSON AND COMPANY

TABLE 195 BECTON, DICKINSON AND COMPANY: BUSINESS OVERVIEW

FIGURE 31 BECTON, DICKINSON AND COMPANY: COMPANY SNAPSHOT

12.1.5 IBA WORLDWIDE



TABLE 196 IBA WORLDWIDE: BUSINESS OVERVIEW

FIGURE 32 IBA WORLDWIDE: COMPANY SNAPSHOT

12.1.6 VIEWRAY, INC.

TABLE 197 VIEWRAY, INC.: BUSINESS OVERVIEW

FIGURE 33 VIEWRAY, INC.: COMPANY SNAPSHOT

12.1.7 ISORAY MEDICAL

TABLE 198 ISORAY MEDICAL: BUSINESS OVERVIEW

FIGURE 34 ISORAY MEDICAL, INC.: COMPANY SNAPSHOT

12.1.8 HITACHI LTD.

TABLE 199 HITACHI LTD.: BUSINESS OVERVIEW

FIGURE 35 HITACHI LTD.: COMPANY SNAPSHOT

12.1.9 PANACEA MEDICAL TECHNOLOGIES PVT. LTD.

TABLE 200 PANACEA MEDICAL TECHNOLOGIES PVT. LTD.: BUSINESS OVERVIEW

12.1.10 PROVISION HEALTHCARE

TABLE 201 PROVISION HEALTHCARE: BUSINESS OVERVIEW

12.1.11 MEVION MEDICAL SYSTEMS

TABLE 202 MEVION MEDICAL SYSTEMS: BUSINESS OVERVIEW

12.1.12 OPTIVUS PROTON THERAPY, INC.

TABLE 203 OPTIVUS PROTON THERAPY: BUSINESS OVERVIEW

12.1.13 P-CURE

TABLE 204 P-CURE: BUSINESS OVERVIEW

12.1.14 SUMITOMO HEAVY INDUSTRIES LTD.

TABLE 205 SUMITOMO HEAVY INDUSTRIES LTD.: BUSINESS OVERVIEW

FIGURE 36 SUMITOMO HEAVY INDUSTRIES: COMPANY SNAPSHOT

TABLE 206 THERAGENICS CORPORATION: BUSINESS OVERVIEW

12.1.15 ZEISS GROUP

TABLE 207 ZEISS GROUP: BUSINESS OVERVIEW

FIGURE 37 ZEISS GROUP: COMPANY SNAPSHOT

12.2 OTHER PLAYERS

12.2.1 INTRAOP MEDICAL, INC.

12.2.2 ICAD, INC.

12.2.3 ECKERT & ZIEGLER

12.2.4 SENSUS HEALTHCARE

12.2.5 S.I.T SORDINA IORT TECHNOLOGIES S.P.A.

\*Details on Business Overview, Products Offered, Recent Developments, MnM view might not be captured in case of unlisted companies.

## 13 APPENDIX

13.1 DISCUSSION GUIDE

13.2 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

13.3 AVAILABLE CUSTOMIZATIONS

13.4 RELATED REPORTS

13.5 AUTHOR DETAILS

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