

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.

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

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