

Robotic Radiotherapy Market Size by Product (System, Software, 3D Camera), Technology (LINAC, Stereotactic, Particle Therapy), Application (Lung, Breast, Colorectal), End-User (Hospitals, Radiotherapy Centres), & Region - Global Forecast to 2028

<https://marketpublishers.com/r/RE8A69E0BDBCEN.html>

Date: April 2024

Pages: 195

Price: US\$ 4,950.00 (Single User License)

ID: RE8A69E0BDBCEN

Abstracts

The global robotic radiotherapy market is projected to reach USD 1.9 billion by 2028 from USD 1.1 billion in 2023, growing at a CAGR of 11.9% during the forecast period. The rising prevalence of cancer and the growing use of robotic radiotherapy is one of the major factors anticipated to boost market growth in the forecasting years.

“3D cameras (SGRT) segment of global robotic radiotherapy market to grow with the highest CAGR in the forecast period.”

On the basis of product, the robotic radiotherapy market is segmented into radiotherapy systems, software, 3D cameras, and others. The 3D cameras segment is expected to register the highest CAGR in the forecast period. Growth in this segment is majorly driven by the ability to offer non-invasive, real-time, 6-degree dimensional patient positioning and monitoring before and during the radiation therapy treatment process, resulting in accurate treatment delivery and wide acceptance by cancer facilities. However, factors such as significant maintenance costs associated with SGRT products, as well as the slow implementation of regulatory guidelines for robotic radiotherapy across emerging countries, are expected to restrain market growth.

“Lung cancer segment, by application, accounted for the largest market share of global robotic radiotherapy market in 2020.”

Based on application, the global robotic radiotherapy market is segmented into prostate

cancer, breast cancer, lung cancer, head & neck cancer, colorectal cancer, and other cancers. The lung cancer segment accounted for the largest share of the global robotic radiotherapy market in 2022. The major drivers of this segment are increasing smoking rates, exposure to air pollutants, especially in urban areas with poor air quality, and exposure to carcinogens in mining, construction, and manufacturing. Modern lifestyles and dietary habits may further elevate the risk of lung cancer. As the global population ages, lung cancer incidence tends to rise, potentially leading to a higher number of cases.

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

Based on the end user, the robotic radiotherapy market is segmented into hospitals and independent radiotherapy centers. Hospitals are the major end users of robotic radiotherapy products. The large share of this end-user segment is primarily attributed to the demand for automated radiation therapy systems, advancement in automated radiation therapy systems and the increasing installations of ART stations, and the rising government investments for effective ART and treatment.

“The APAC market, by region, to register highest growth rate in the forecast period.”

On the basis of region, the robotic radiotherapy market is segmented into North America, Europe, Asia Pacific, and the Rest of the World. The Asia-Pacific market is likely witness significant growth owing to increase in disposable income and increase in cancer patient pool. Focus on governments on investment on robotic radiotherapy systems, modernization of industrial and public infrastructures, and rising penetration of cutting-edge radiation therapy in hospitals. However, a dearth of skilled professionals for the operation of advanced instruments, slow implementation of therapy due to budgetary constraints, and pricing pressures faced by prominent product manufacturers are the key factors restraining the growth of the robotic radiotherapy market despite the great opportunities available in the APAC region.

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

By Company Type: Tier 1–48%, Tier 2–36%, and Tier 3– 16%

By Designation: C-level–10%, Director-level–14%, and Others–76%

By Region: North America–40%, Europe–32%, Asia Pacific–20%, Latin

America–5%, MEA- 3%

The prominent players in the robotic radiotherapy market are Siemens Healthcare GmbH (Germany), Elekta (Sweden), Accuray Incorporated (US), IBA (Belgium), ViewRay Technologies, Inc. (US), C-RAD (Sweden), IBA Worldwide (Belgium), Hitachi Ltd. (Japan (US), Mevion Medical Systems (US), Optivus Proton Therapy, Inc. (US) and Panacea Medical Technologies Pvt. Ltd. (India), among others.

Research Coverage

This report studies the robotic radiotherapy market based on product, technology, 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 micro markets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to four 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 to strengthen their market presence.

This report provides insights on the following pointers:

Analysis of key drivers (growing demand for non-invasive treatments, technological advancements, rising prevalence of cancer, growing use of automated radiation therapy for cancer treatment), restraints (lack of adequate healthcare, high cost of automated radiation therapy systems, complex nature of technology, dearth of skilled radiologist), opportunities (rising healthcare expenditure across developing countries, growing government and private investments, adoption of radiation therapy), and challenges (risk of radiation exposure, competition from alternative treatment modalities) influencing the growth of robotic radiotherapy market

Market Penetration: Comprehensive information on the product portfolios offered

by the top players in the robotic radiotherapy market

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

Market Development: Comprehensive information on lucrative emerging regions

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

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

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*Business Overview, Products/Services/Solutions Offered, Recent Developments, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats might not be captured in case of unlisted companies.

12.2 OTHER PLAYERS

12.2.1 STANDARD IMAGING, INC.

12.2.2 BRAINLAB AG

12.2.3 MAGNETTX ONCOLOGY SOLUTIONS LTD.

12.2.4 PTW FREIBURG GMBH

12.2.5 DOSISOFT SA

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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