

# **Medical Radiation Detection Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Gas-filled Detector, Scintillators), By Product (Personal Dosimeters, Area Process Dosimeters), By End-use (Hospitals, Ambulatory Surgical Centers, Diagnostic Imaging Centers, Homecare), By Region, By Competition**

<https://marketpublishers.com/r/MAFB38638D73EN.html>

Date: October 2023

Pages: 189

Price: US\$ 4,500.00 (Single User License)

ID: MAFB38638D73EN

## **Abstracts**

Global Medical Radiation Detection Market has valued at USD 950.14 Million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 7.18% and is expected to reach USD 2458.13 million through 2028. Medical radiation detectors are a type of medical equipment that detects the presence of radiation. When a person is exposed to radiation for a considerable length of time, an individual is more prone to develop a number of deadly diseases. This raises the requirement for technology capable of detecting the amount of radiation accumulating in the body. Some of the key detectors for detecting radioactive materials and ionizing radiation include the handheld survey meter (HSM), personal radiation detector (PRD), radiation portal monitor (RPM), and radiation isotope identification device (RIID). As technology advances, various radiation-detecting devices may become available for use at home. Dosimeters are medical radiation detectors that can detect Gamma rays, the most dangerous external radioactive threat. The increasing prevalence of cancer necessitates the use of medical radiation detectors, which propels the market growth. In addition, increased use of nuclear medicine and radiation therapy for the diagnosis and treatment of acute radiation illness will contribute to the medical radiation detection market growth in the coming years. Furthermore, the number of diagnostic imaging facilities that require medical radiation detectors to avoid excessive radiation exposure has increased significantly, fueling the market growth during the forecast period. Rising awareness

regarding safety from prolonged exposure to radiation especially in radiation-prone settings as well as an increase in the number of individuals having medical insurance would propel the growth of the medical radiation market during the forecast period.. The rising cost of medical radiation detection, on the other hand, will stifle market growth. Furthermore, the increased potential for medical radiation detection in emerging markets is expected to help the industry generate more opportunities in the coming years.

## Key Market Drivers

### Rising Incidence of Cancer

Cancer is one of the leading causes of mortality worldwide, and radiation therapy is a crucial component of cancer treatment. As the number of cancer cases continues to rise, there is a parallel increase in the demand for radiation therapy. This drives the need for accurate and effective radiation detection solutions to ensure that patients receive the right dose of radiation during treatment. Cancer diagnosis often involves various imaging techniques such as X-rays, CT scans, and PET scans, which utilize ionizing radiation. With more cancer cases, there is a growing demand for diagnostic imaging, leading to an increased requirement for radiation detection devices to ensure patient safety during these procedures. Advances in cancer treatment are moving towards precision medicine and personalized treatment plans. Radiation therapy is becoming more targeted and tailored to individual patients. This precision requires advanced radiation detection systems to precisely measure and control the radiation dose delivered to tumors while minimizing damage to healthy tissues. Patient safety and the avoidance of unnecessary radiation exposure are paramount in cancer treatment. As awareness of radiation safety grows, healthcare facilities and practitioners are investing in radiation detection equipment to monitor and verify radiation doses, ensuring that patients receive the right treatment with minimal side effects. Regulatory agencies are increasingly stringent in enforcing radiation safety standards. Healthcare facilities must adhere to these regulations, which mandate the use of reliable radiation detection systems. Non-compliance can result in penalties, legal consequences, and damage to a facility's reputation, driving market demand for compliant solutions. The growing incidence of cancer fuels research and development efforts in the medical radiation detection sector. Innovations in detector technology, dose monitoring software, and real-time tracking systems are continually being developed to meet the evolving needs of cancer treatment.

### Increased Awareness of Radiation Safety

As awareness of radiation safety grows, there is a greater emphasis on adhering to stringent regulatory guidelines and standards. Healthcare facilities and providers are increasingly conscious of the need to comply with these regulations to ensure patient and staff safety. This drives the demand for reliable radiation detection equipment and solutions that help meet these compliance requirements. Healthcare professionals, including radiologic technologists and radiation therapists, are now more well-informed about the potential risks associated with radiation exposure. This increased awareness results in more rigorous training and education programs, which, in turn, lead to a higher demand for radiation detection tools and technologies to reinforce safety protocols. Patients are increasingly informed about their own healthcare, including radiation exposure risks associated with diagnostic and therapeutic procedures. Patient advocacy groups and informed individuals often put pressure on healthcare providers to prioritize radiation safety. This, in turn, leads to investments in radiation detection systems to ensure that radiation doses are kept as low as reasonably achievable (ALARA). The awareness of radiation safety risks prompts healthcare facilities to adopt a proactive approach to risk mitigation. They invest in advanced radiation detection technologies to monitor and control radiation doses accurately, minimizing the potential for overexposure and associated health risks. The development of a radiation safety culture within healthcare organizations is essential. This involves not only having the right equipment but also promoting a mindset where safety is a top priority. The awareness of radiation safety helps foster this culture, encouraging healthcare facilities to invest in radiation detection tools and training programs. As more healthcare facilities and professionals recognize the importance of radiation safety, the demand for radiation detection equipment increases. This growing demand incentivizes manufacturers and developers to innovate and produce more advanced and user-friendly radiation detection solutions, further propelling market growth.

### Increasing Research and Development Investments

R&D investments drive innovation in radiation detection technologies. This includes the development of more sensitive detectors, advanced data processing algorithms, and integration with other healthcare systems. Innovative products attract healthcare providers looking to improve patient safety and diagnostic/therapeutic accuracy, stimulating market growth. R&D investments lead to the creation of radiation detection devices with improved performance metrics. This includes higher accuracy in dose measurement, lower detection limits, and increased reliability. Healthcare facilities seek out such devices to optimize radiation therapy and diagnostic procedures, thus boosting demand. R&D efforts result in radiation detection systems that can be customized to

suit specific clinical needs. The ability to adapt these systems to various medical applications, such as oncology, cardiology, or radiology, makes them more appealing to healthcare providers, ultimately driving market growth. Ongoing R&D investments contribute to the development of real-time monitoring capabilities. This allows healthcare professionals to continuously track radiation exposure during procedures, enhancing patient safety and enabling immediate adjustments if necessary. The demand for such real-time monitoring solutions fuels market growth. Integration of radiation detection data with EHRs is becoming increasingly important. R&D investments help create seamless interoperability, enabling healthcare providers to access and analyze radiation exposure data as part of the patient's overall health record. This integration supports data-driven decision-making and quality improvement, furthering market expansion. R&D investments lead to innovations that enable the reduction of radiation doses while maintaining diagnostic and therapeutic efficacy. This is particularly significant in medical imaging and radiation therapy, as it aligns with the ALARA (As Low As Reasonably Achievable) principle. Reduced radiation exposure is a key selling point for radiation detection systems, driving their adoption.

## Key Market Challenges

### Technological Complexity

Highly complex technologies can create barriers to adoption, particularly for smaller healthcare facilities or those with limited resources. The steep learning curve and training requirements for staff can deter some institutions from investing in advanced radiation detection systems. Technologically complex systems often come with higher initial acquisition costs. In addition to purchasing the equipment itself, healthcare providers may need to invest in specialized staff training, maintenance, and ongoing support. The financial burden associated with complexity can limit market growth, especially in resource-constrained healthcare settings. Complex systems may not easily integrate with existing healthcare IT infrastructure, such as electronic health records (EHRs) and picture archiving and communication systems (PACS). Ensuring seamless interoperability is critical for efficient workflow and data sharing, and complexity can hinder this integration. Complex technologies often require more frequent maintenance and updates, which can be resource intensive. This ongoing commitment to maintenance can be a deterrent for healthcare providers, particularly those with limited budgets. Implementing and managing technologically complex radiation detection systems may require specialized skills and expertise. There can be a shortage of professionals with the necessary knowledge to operate and maintain these systems effectively, leading to operational challenges. The more complex a system, the higher

the potential for errors in its operation. This can pose significant risks in a healthcare setting where accuracy and safety are paramount. Errors related to complex technology can undermine trust in the system and deter its adoption.

## Radiation Dose Optimization

Radiation dose optimization efforts often focus on minimizing radiation exposure to patients while maintaining diagnostic or therapeutic efficacy. While this is essential for patient safety, it can lead to a reduced demand for certain types of radiation detection equipment. If healthcare facilities are successfully optimizing doses and using lower levels of radiation, they may require fewer radiation detectors, which can impact equipment sales for manufacturers. Dose optimization strategies aim to reduce the need for repeat procedures, which can be necessary when initial diagnostic images are of poor quality. While this is a positive outcome for patient care, it can lead to fewer repeat imaging studies and, consequently, less demand for radiation detection equipment. In some cases, reducing radiation doses may result in longer imaging or treatment times. This can impact the overall efficiency of healthcare facilities, leading to economic challenges. If dose optimization strategies are not carefully implemented, they can be seen as a financial burden, potentially delaying investments in radiation detection equipment. In regions where healthcare facilities have already invested significantly in radiation detection equipment and dose optimization measures, there may be a sense of market saturation. Once these facilities have optimized their radiation doses, they may not seek additional equipment or solutions, limiting market growth opportunities. Dose optimization efforts often require strict adherence to regulatory guidelines and standards. While this is essential for patient safety, it can also create challenges for manufacturers who need to ensure their equipment complies with these regulations. Meeting regulatory requirements can be costly and time-consuming. Effective dose optimization strategies require healthcare professionals to undergo training and education. This can be a resource-intensive process for healthcare facilities, and if not managed well, it can deter investments in radiation detection equipment.

## Key Market Trends

### AI-Powered Radiation Detection

AI algorithms can analyze large datasets and identify subtle patterns in radiation data that may not be apparent to human operators. This leads to more accurate and precise radiation measurements, resulting in improved patient safety and treatment efficacy.



Healthcare providers are increasingly relying on AI-powered systems to ensure the delivery of the correct radiation dose to the target area while sparing healthy tissues. AI-powered radiation detection systems can provide real-time monitoring and generate alerts when radiation levels exceed predefined thresholds. This proactive approach enhances patient safety by allowing immediate interventions in case of unexpected radiation spikes or deviations from the treatment plan. AI can automate the analysis of radiation data, reducing the burden on healthcare professionals and streamlining workflows. Radiologists and radiation therapists can focus more on patient care and treatment planning, knowing that AI is assisting with data interpretation. AI can predict potential issues or trends based on historical radiation data. For example, it can forecast equipment maintenance needs, optimize treatment plans, or identify patients at higher risk of radiation-related side effects. Predictive analytics contribute to improved patient outcomes and resource allocation. AI algorithms can optimize radiation doses by considering various patient-specific factors, such as anatomy, tumor characteristics, and treatment response. This results in personalized treatment plans that maximize therapeutic benefits while minimizing side effects, aligning with the trend of personalized medicine. AI is driving innovation in the development of new radiation detection technologies. Companies are investing in AI research to create more advanced and user-friendly solutions. This fosters competition and encourages the introduction of cutting-edge products into the market.

### Remote Monitoring and Telemetry

Remote monitoring and telemetry systems allow healthcare providers to continuously monitor radiation levels and equipment status in real time. This capability is crucial for ensuring patient safety during diagnostic imaging or radiation therapy. Any unexpected radiation spikes or equipment malfunctions can be detected promptly, leading to immediate interventions to prevent harm. Remote monitoring reduces the need for constant on-site supervision of radiation detection equipment. Healthcare facilities can streamline their workflow by remotely monitoring multiple devices and treatment rooms simultaneously, leading to increased operational efficiency. Telemetry systems can monitor the performance of radiation detection equipment and detect early signs of potential malfunctions or maintenance needs. This proactive approach minimizes equipment downtime, reduces the risk of errors, and enhances the reliability of radiation detection systems. Remote monitoring supports the growth of telemedicine and teleradiology, enabling healthcare professionals to remotely review and interpret radiation data from various locations. This is particularly valuable for underserved or remote areas where access to specialized care is limited. Remote monitoring systems can collect and transmit data to centralized databases for analysis. This data can be

used for trend analysis, quality improvement initiatives, and research, providing valuable insights into radiation safety and treatment effectiveness.

### Segmental Insights

#### End-use Insights

Based on the End-use, the Hospitals segment is anticipated to witness substantial market growth throughout the forecast period. Large hospitals typically have more resources and higher patient volumes, which may drive higher demand for medical radiation detection devices. Teaching hospitals often have more advanced equipment and may require state-of-the-art radiation detection technology to train medical professionals, potentially boosting market growth. Hospitals in urban areas may have more patients and specialized departments, leading to greater demand for radiation detection devices. Market growth can vary by region due to differences in healthcare infrastructure and regulations. Hospitals specializing in cancer treatment heavily rely on radiation therapy, increasing the need for radiation detection equipment. These hospitals may require specialized radiation detection devices calibrated for pediatric patients, impacting market growth in this segment. Hospitals that quickly adopt new medical technologies and equipment may drive the market by upgrading their radiation detection systems to newer, more advanced models. Hospitals must adhere to strict radiation safety regulations. Changes in regulations or increased enforcement can stimulate demand for radiation detection equipment. Hospitals with limited budgets may prioritize other medical equipment over radiation detection devices, potentially slowing market growth in these segments. Hospitals with a higher volume of elderly patients may require more radiation detection devices due to the increased incidence of certain diseases like cancer.

#### Type Insights

Based on the Type segment, the Gas-filled Detector segment has been the dominant force in the market. Gas-filled detectors are essential tools for monitoring radiation levels in healthcare facilities. They contribute to enhanced radiation safety by providing accurate measurements of radiation exposure. As concerns about radiation safety and patient protection continue to grow, the demand for reliable detectors increases, positively impacting market growth. Gas-filled detectors are frequently used in radiation therapy to measure and verify the dose of radiation delivered to cancer patients. The accuracy and precision of these detectors are critical for effective cancer treatment. As the number of cancer cases and the demand for radiation therapy rise, the market for

gas-filled detectors also expands. Gas-filled detectors are used in various medical imaging modalities, such as computed tomography (CT) and radiography, to measure radiation doses and optimize image quality. The increasing prevalence of medical imaging procedures drives the demand for detectors that can ensure accurate dose control, benefiting the market. In nuclear medicine, gas-filled detectors are used to detect gamma radiation emitted by radiopharmaceuticals during imaging procedures. The growth of nuclear medicine procedures, driven by advancements in imaging technology and the increasing incidence of conditions like cancer and heart disease, contributes to the demand for gas-filled detectors. Research institutions and universities also contribute to the demand for gas-filled detectors. They use these detectors in laboratory settings to conduct experiments and research related to radiation and its effects. Advances in medical research further stimulate market growth. Ongoing technological advancements in gas-filled detectors, such as the development of more sensitive and compact detectors with improved energy resolution, drive adoption in healthcare settings. Manufacturers continually innovate to meet the evolving needs of medical professionals.

## Regional Insights

North America, specifically the Medical Radiation Detection Market, dominated the market in 2022, primarily due to North America, particularly the United States and Canada, boasts a highly advanced and well-established healthcare infrastructure. The region is home to numerous hospitals, clinics, and research institutions that regularly utilize medical radiation detection equipment for various purposes, including diagnosis and treatment. The North American region has a relatively high prevalence of cancer, which often requires radiation therapy as part of the treatment regimen. This drives the demand for radiation detection devices to ensure accurate and safe radiation delivery to patients. North America is a hub for medical technology innovation. Many leading manufacturers of radiation detection equipment are based in the region, continuously developing and introducing advanced products. This encourages healthcare providers to upgrade their equipment, contributing to market growth. North America has well-defined and strict regulatory frameworks for radiation safety and medical device approval. Compliance with these regulations requires the use of high-quality radiation detection devices, thus stimulating demand in the market. There is a growing awareness of the importance of radiation safety among healthcare professionals and patients in North America. This awareness drives the adoption of radiation detection equipment for both diagnostic and therapeutic applications.

## Key Market Players



Thermo Fisher Scientific, Inc.

UAB Polimaster Europe.

PTW Freiburg GmbH.

ATOMTEX.

Sanlar imex services private limited.

LANDAUER.

Mirion Technologies, Inc.

MP BIOMEDICALS.

SIERRA RADIATION DOSIMETRY SERVICE, INC.

IBA Dosimetry GmbH.

#### Report Scope:

In this report, the Global Medical Radiation Detection Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Medical Radiation Detection Market, By Type:

Gas-filled Detector

Scintillators

Medical Radiation Detection Market, By Product:

Personal Dosimeters

Area Process Dosimeters

## Medical Radiation Detection Market, By End Use:

Hospitals

Ambulatory Surgical Centers

Diagnostic Imaging Centers

Homecare

## Medical Radiation Detection Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

## Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Global Medical Radiation Detection Market.

## Available Customizations:

Global Medical Radiation Detection market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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## I would like to order

Product name: Medical Radiation Detection Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Gas-filled Detector, Scintillators), By Product (Personal Dosimeters, Area Process Dosimeters), By End-use (Hospitals, Ambulatory Surgical Centers, Diagnostic Imaging Centers, Homecare), By Region, By Competition

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