

# **Radiotherapy Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2018-2028**

## **Segmented By Type (External Beam Radiation Therapy, Internal Radiation Therapy, Systemic Radiation Therapy), By Application (kin & Lip Cancer, Breast Cancer, Prostate Cancer, Cervical Cancer, Lung Cancer, Others), By End-User (Hospitals, Research Institutes, Ambulatory and Radiotherapy Centers), By Region, Competition**

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### **Abstracts**

In 2022, the Global Radiotherapy Market reached a valuation of USD 6.12 billion, and it is expected to maintain stable growth throughout the forecast period, demonstrating a consistent Compound Annual Growth Rate (CAGR) of 8.18% until 2028. The Global Radiotherapy Market stands as an indispensable element of modern healthcare, assuming a pivotal role in the treatment of various cancers and non-malignant conditions.

Radiotherapy, also referred to as radiation therapy, revolves around the precise application of ionizing radiation to target and eliminate cancer cells, mitigate symptoms, or impede the progression of diseases. This market overview offers valuable insights into the current landscape of the Global Radiotherapy Market, encompassing its scale, catalysts for growth, prominent stakeholders, and emerging trends.

Key Market Drivers

Technological Advancements

Technological advancements have been instrumental in propelling the growth of the Global Radiotherapy Market. Here's an in-depth look at this critical driver:

**Precision and Targeting:** The advent of cutting-edge technologies such as Intensity-Modulated Radiation Therapy (IMRT), Stereotactic Body Radiation Therapy (SBRT), and Proton Therapy has transformed the landscape of radiotherapy. These techniques enable precise targeting of cancer cells while minimizing damage to surrounding healthy tissues. This precision translates to improved treatment outcomes and reduced side effects, making radiotherapy an attractive choice for both patients and healthcare providers.

**Integration of AI and ML:** Artificial Intelligence (AI) and Machine Learning (ML) algorithms have found their way into radiotherapy planning and delivery. AI-driven software can analyze complex medical data and assist in treatment planning, optimizing the radiation dose distribution. Moreover, AI can predict patient responses, allowing for personalized treatment plans. These advancements not only enhance treatment efficacy but also streamline the workflow of radiotherapy departments, reducing operational costs.

**Image-Guided Radiotherapy (IGRT):** IGRT is another milestone in radiotherapy technology. It involves the use of real-time imaging during treatment, ensuring that the radiation beam precisely targets the tumor's position at all times. This real-time monitoring reduces the margin of error and enhances treatment accuracy, particularly for tumors that may move during the course of treatment.

**Radiosurgery and Stereotactic Radiosurgery (SRS):** Radiosurgery techniques, like SRS, have expanded the scope of radiotherapy beyond conventional fractionated treatments. SRS delivers high doses of radiation in a single session, making it highly effective for small tumors or lesions in the brain and body. This approach offers convenience to patients and minimizes the need for prolonged treatment regimens.

### Rising Incidence of Cancer

The global increase in cancer cases is a significant driver for the radiotherapy market. Here's a comprehensive analysis:

**Global Cancer Burden:** The World Health Organization (WHO) reports a steady rise in cancer cases worldwide, with estimates projecting an increase in new cancer cases by nearly 70% over the next two decades. This alarming reality underscores the urgent need for effective cancer treatment modalities.

**Role of Radiotherapy:** Radiotherapy has emerged as a critical component in the multi-modal management of cancer. It is used for both curative and palliative purposes, making it indispensable in the fight against this complex disease. With the aging population and lifestyle factors contributing to cancer

incidence, radiotherapy's demand is set to rise. **Variability in Cancer Types:** Radiotherapy is not limited to a specific type of cancer. It is applicable across a wide range of malignancies, including but not limited to breast cancer, lung cancer, prostate cancer, and brain tumors. This versatility positions radiotherapy as a versatile and adaptable treatment option.

### Expanding Healthcare Infrastructure

The expansion of healthcare infrastructure is a pivotal driver for the global radiotherapy market. Here's an in-depth examination:

**Cancer Centers and Facilities:** Developing countries are witnessing substantial investments in healthcare infrastructure, particularly in the establishment of dedicated cancer centers and radiotherapy facilities. These state-of-the-art centers bring radiotherapy services closer to patients, reducing travel distances and enhancing accessibility. **Patient Reach:** A robust healthcare infrastructure ensures that a larger portion of the population can access radiotherapy services. This is crucial in addressing healthcare disparities and ensuring that radiotherapy's benefits are not limited to urban areas. **Advanced Equipment:** The expansion of healthcare infrastructure often includes the acquisition of advanced radiotherapy equipment. Linear accelerators (LINACs) and brachytherapy units are becoming more widely available, allowing for the delivery of advanced treatment modalities.

### Collaborative Research and Clinical Trials

Collaborative research and clinical trials are catalysts for innovation in the global radiotherapy market. Here's a detailed analysis:

**Interdisciplinary Collaboration:** Collaboration between academic institutions, pharmaceutical companies, and healthcare providers drives research initiatives. This interdisciplinary approach fosters the exchange of knowledge and expertise, leading to groundbreaking discoveries. **Treatment Optimization:** Clinical trials play a pivotal role in optimizing radiotherapy techniques and regimens. They explore novel approaches, such as combining radiotherapy with immunotherapy or targeted therapies, to improve treatment outcomes. **Personalized Medicine:** Research efforts are increasingly focused on personalized medicine, tailoring radiotherapy plans to individual patient profiles. This approach aims to maximize efficacy while minimizing side effects, a critical aspect of modern cancer care.

## Key Market Challenges

### Cost and Accessibility Barriers

**High Initial Investment:** One of the primary challenges in expanding the use of radiotherapy is the substantial upfront cost associated with acquiring and installing radiotherapy equipment. Modern radiotherapy machines, such as linear accelerators (LINACs) and proton therapy systems, require significant capital investment. This can be a deterrent for healthcare facilities, especially in resource-constrained regions.

**Operational Expenses:** Beyond the initial purchase, radiotherapy equipment demands ongoing maintenance, staff training, and operational expenses. These costs can strain healthcare budgets, making it challenging for some facilities to sustain radiotherapy services over the long term.

**Disparities in Access:** Accessibility to radiotherapy services is not uniform across regions and countries. Rural areas and low-income regions often face challenges in establishing and maintaining radiotherapy facilities. This creates disparities in access to advanced cancer treatment options, potentially limiting the market's growth.

### Regulatory and Compliance Hurdles

**Stringent Regulatory Requirements:** The radiotherapy industry is subject to strict regulatory oversight due to the potential risks associated with radiation therapy. Meeting these stringent regulatory requirements can be time-consuming and costly for manufacturers and healthcare providers. Any delays in obtaining regulatory approvals can slow down the introduction of new technologies and treatment techniques.

**Reimbursement Issues:** Reimbursement policies for radiotherapy treatments vary from one country to another. Inconsistent reimbursement rates and procedures can discourage healthcare providers from offering radiotherapy services. It can also limit patient access to these treatments, particularly in regions with lower reimbursement rates.

**Quality Assurance and Radiation Safety:** Ensuring the safety and quality of radiotherapy treatments is paramount. Healthcare facilities must adhere to rigorous quality assurance protocols and radiation safety standards. Compliance with these standards can be resource-intensive, and failure to meet them can result in regulatory penalties and legal liabilities.

### Skilled Workforce Shortages

**Specialized Training Requirements:** Radiotherapy requires a highly skilled and specialized workforce, including radiation oncologists, medical physicists, radiation

therapists, and dosimetrists. Training these professionals demands substantial time and resources. A shortage of qualified personnel can limit the capacity of healthcare facilities to offer radiotherapy services. **Brain Drain and Workforce Migration:** In some cases, regions facing workforce shortages may experience a 'brain drain' as skilled professionals seek opportunities in areas with better compensation or working conditions. This migration of talent can exacerbate workforce shortages in areas that need radiotherapy services the most. **Continuous Education and Training:** The field of radiotherapy is continuously evolving with the introduction of new technologies and treatment modalities. Keeping the workforce updated and well-trained requires ongoing education and professional development, which can be challenging to maintain consistently.

## Key Market Trends

### Advanced Radiation Delivery Techniques

**Intensity-Modulated Radiation Therapy (IMRT):** IMRT is a highly precise radiotherapy technique that has gained significant traction. It allows for the modulation of radiation intensity across different parts of the treatment area, minimizing radiation exposure to healthy tissues while targeting cancer cells with greater accuracy. This technique reduces side effects and improves patient outcomes. **Proton therapy** is another cutting-edge trend in radiotherapy. Unlike traditional X-ray radiation, proton therapy uses charged particles (protons) to target tumors. It offers even greater precision, as protons deposit their energy directly into the tumor, minimizing damage to surrounding tissues. As more proton therapy centers are established worldwide, this trend is expected to grow. **Hypofractionation**, which involves delivering higher doses of radiation over fewer sessions, is becoming more common. **SRS**, a form of hypofractionation, is especially popular for treating small tumors in the brain and body. These techniques reduce treatment duration and improve patient convenience. These advanced radiation delivery techniques have evolved to enhance treatment efficacy while minimizing side effects. They are a response to the growing demand for personalized and precise cancer care. Patients are increasingly seeking treatments that not only cure cancer but also maintain their quality of life during and after therapy.

### Integration of Artificial Intelligence (AI) and Machine Learning (ML)

**Treatment Planning Optimization:** AI and ML algorithms are being used to optimize treatment planning. They can analyze vast datasets, consider multiple variables, and suggest the most effective radiation dose distribution for individual patients. This not

only enhances treatment efficacy but also reduces planning time. AI is being applied to quality assurance processes. Automated systems can monitor and verify radiation delivery in real-time, ensuring that treatments are on target. Any deviations can be detected and corrected promptly, improving patient safety. AI-powered predictive analytics can forecast patient responses to radiotherapy. By analyzing historical data and patient profiles, these systems can help oncologists tailor treatment plans to maximize outcomes and minimize side effects. The integration of AI and ML in radiotherapy is driven by the need for precision and efficiency. These technologies reduce the margin of error, streamline workflows, and contribute to the overall improvement of patient care.

### Expanding Applications Beyond Oncology

**Non-Oncological Applications:** Radiotherapy is increasingly being explored for non-oncological conditions. It has shown promise in treating benign tumors, neurological disorders, and certain autoimmune diseases. This expansion of applications broadens the market's reach and potential. Radiotherapy is being combined with other treatment modalities, such as immunotherapy and targeted therapy, to enhance its effectiveness. This approach is particularly relevant in the field of oncology, where combination therapies can improve cancer treatment outcomes. Specialized pediatric radiotherapy centers are emerging to cater to the unique needs of pediatric patients. These centers are equipped with child-friendly facilities and treatment techniques that minimize radiation exposure to growing tissues. The exploration of radiotherapy for non-oncological conditions and its integration with other treatments is driven by the desire to maximize the benefits of this therapy. As research continues to uncover new applications, the radiotherapy market is poised to expand further.

### Segmental Insights

#### Type Insights

Based on the category of Type, the external beam radiation therapy (EBRT) segment emerged as the dominant player in the global market for Radiotherapy in 2022. This is highly versatile and can be employed to treat various types of cancer, including but not limited to prostate, breast, lung, and head and neck cancers. Its adaptability to different cancer types contributes to its widespread adoption. **Curative and Palliative Treatment:** EBRT can be used for both curative and palliative purposes. In curative settings, it aims to eliminate cancer cells completely, while in palliative care, it provides relief from symptoms and improves the quality of life for advanced-stage cancer patients. This dual

functionality increases its utility.

**Non-Invasive Treatment:** EBRT is non-invasive, meaning it does not require surgical incisions. Patients are not subjected to the physical trauma associated with surgery, leading to quicker recovery times and reduced post-treatment complications. Advanced EBRT techniques, such as Intensity-Modulated Radiation Therapy (IMRT) and Image-Guided Radiation Therapy (IGRT), enable precise targeting of tumors while sparing healthy surrounding tissues. This minimization of collateral damage results in fewer side effects, making it an attractive choice for patients.

**Widespread Availability:** EBRT is offered in a broad range of healthcare settings, including large cancer centers, community hospitals, and even outpatient clinics. This accessibility ensures that a significant portion of the population has access to EBRT services. Compared to some other radiotherapy modalities, EBRT tends to be more cost-effective in terms of equipment, training, and maintenance. Its affordability makes it an attractive option for healthcare facilities with budget constraints.

EBRT has benefited from continuous technological advancements. Modern EBRT machines, such as Linear Accelerators (LINACs) and CyberKnife systems, offer enhanced precision, imaging capabilities, and treatment planning. These technologies improve treatment outcomes and reduce side effects. The integration of Artificial Intelligence (AI) and automation in EBRT enhances treatment planning and delivery. AI-driven algorithms can optimize radiation dose distribution, monitor treatment in real-time, and predict patient responses, leading to more efficient and personalized treatments. These factors are expected to drive the growth of this segment.

### Application Insight

Based on the category of Application, the breast cancer segment emerged as the dominant player in the global market for Radiotherapy in 2022. Breast cancer is the most common cancer among women globally, with a high incidence rate. The sheer number of breast cancer cases necessitates a robust and widely available treatment modality like radiotherapy. Advances in breast cancer screening and early detection programs have led to the identification of breast cancer at earlier stages. Radiotherapy plays a crucial role in the treatment of both early-stage and advanced breast cancer, ensuring its dominance in the market. **Preference for Breast Preservation:** Many women diagnosed with breast cancer prefer breast-conserving surgery, or lumpectomy, to preserve their breasts. Radiotherapy is a pivotal component of breast-conserving therapy, ensuring that residual cancer cells are effectively treated post-surgery. This

preference for breast preservation significantly drives the demand for radiotherapy in breast cancer cases.

**Intensity-Modulated Radiation Therapy (IMRT):** IMRT allows for highly precise radiation dose delivery, which is particularly advantageous in breast cancer treatment. It enables radiation oncologists to spare nearby critical structures like the heart and lungs while targeting the tumor, reducing the risk of long-term side effects. PBI is a specialized radiotherapy technique that delivers radiation directly to the tumor bed after lumpectomy. This approach significantly shortens the duration of treatment and minimizes radiation exposure to healthy breast tissue.

### End-User Insights

The hospital segment is projected to experience rapid growth during the forecast period. Hospitals provide a multidisciplinary approach to cancer care, with access to medical oncologists, radiation oncologists, surgical oncologists, radiologists, and support staff, all under one roof. This comprehensive approach ensures seamless coordination of treatments, including radiotherapy. Hospitals typically have state-of-the-art diagnostic equipment, such as CT scanners and MRI machines, which are essential for precise treatment planning in radiotherapy. Having these resources readily available streamlines the entire treatment process.

**Emergency Response:** Hospitals are equipped to handle medical emergencies, including acute radiation side effects or unexpected complications during radiotherapy. This capability ensures the safety of patients and contributes to the trust patients place in hospitals for their cancer treatment. In cases where patients require intensive monitoring and care due to the severity of their condition or treatment-related complications, hospitals have ICUs and specialized medical teams to manage these situations.

**Radiotherapy Machines:** Hospitals typically house a range of radiotherapy machines, including Linear Accelerators (LINACs), CyberKnife systems, and TomoTherapy units. These machines offer various treatment modalities, allowing for tailored approaches to different cancer types and patient needs. Hospitals often have dedicated brachytherapy suites equipped for internal radiation therapy, which is crucial for treating certain types of cancer, such as cervical, prostate, or gynecological cancers. These factors collectively contribute to the growth of this segment.

### Regional Insights



North America emerged as the dominant player in the global Radiotherapy market in 2022, holding the largest market share in terms of both value and volume. The United States and Canada, boasts a highly developed healthcare infrastructure, including top-tier hospitals and cancer centers. These institutions have access to the latest radiotherapy equipment and technologies. **Cancer Prevalence:** North America has a relatively high prevalence of cancer, which drives the demand for radiotherapy services. **Factors such as lifestyle choices, genetics, and an aging population contribute to the incidence of various cancer types.** **Cutting-Edge Technologies:** The region is at the forefront of technological advancements in radiotherapy. Advanced treatment modalities, such as Intensity-Modulated Radiation Therapy (IMRT), Stereotactic Body Radiation Therapy (SBRT), and Proton Therapy, are widely available in North American healthcare settings. North America hosts numerous research institutions and conducts a substantial portion of global clinical trials in oncology and radiotherapy. This continuous research contributes to the development of innovative treatment approaches and technologies.

**Insurance Coverage:** Many individuals in North America have health insurance coverage that includes radiotherapy treatments. This insurance coverage eases the financial burden on patients and encourages them to seek radiotherapy when needed. Patients in North America typically have relatively easy access to healthcare facilities. Urban and suburban areas are well-served by comprehensive cancer care centers, reducing geographical barriers to treatment.

The Asia-Pacific market is poised to be the fastest-growing market, offering lucrative growth opportunities for Radiotherapy players during the forecast period. **Factors such population growth, aging, and changing lifestyles contribute to this trend, creating a substantial demand for cancer treatment, including radiotherapy.** **Infrastructure Development:** Many countries in the Asia-Pacific region are investing heavily in healthcare infrastructure expansion, including the establishment of cancer treatment centers and radiotherapy facilities. This expansion aims to address the increasing demand for cancer care. **Adoption of Modern Technologies:** The region is progressively adopting advanced radiotherapy technologies. While there may be variations in the availability of cutting-edge equipment, the trend is toward the integration of modern radiotherapy modalities into cancer treatment protocols. **Supportive Policies:** Some Asia-Pacific governments are implementing policies to improve cancer care and treatment accessibility. These initiatives may include subsidizing radiotherapy treatments or supporting the development of cancer care infrastructure. **Rising Middle Class:** Economic growth in many Asia-Pacific countries has led to an expanding middle class

with increased healthcare expectations. This demographic is more likely to seek advanced cancer treatments, including radiotherapy.

### Key Market Players

Canon Medical Systems Corporation

GE Healthcare

Elekta

ViewRay Technologies, Inc.

Mevion Medical Systems

Eckert & Ziegler (BEBIG Medical)

Siemens Healthineers AG

Accuray Incorporated

Isoray Inc.

Hitachi, Ltd.

ALCEN (PMB)

### Report Scope:

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

#### Radiotherapy Market, By Type:

External Beam Radiation Therapy

Internal Radiation Therapy

Systemic Radiation Therapy

Radiotherapy Market, By Application:

Skin & Lip Cancer

Breast Cancer

Prostate Cancer

Cervical Cancer

Lung Cancer

Others

Radiotherapy Market, By End-User:

Hospitals

Research Institutes

Ambulatory and Radiotherapy Centers

Radiotherapy 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 Radiotherapy Market.

## Available Customizations:

Global Radiotherapy 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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