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Image Guided Radiotherapy Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis Report Coverage: By Type (Product and Services), Application (Breast Cancer, Lung Cancer, Gastrointestinal Cancer, Prostrate Cancer, Gynecological Cancers, Head and Neck Cancer, and Others), Imaging Type (Magnetic Resonance Imaging (MRI), Positron Emission Tomography, Computed Tomography Imaging, and Others), End Users (Hospitals, Oncology Centers, and Radiotherapy Centers), and Geography (North America, Europe, Asia Pacific, South & Central America, and Middle East & Africa)

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Abstracts

The Image Guided Radiotherapy Market was valued at US$ 1.814 billion in 2022 and is projected to reach US$ 5.650 billion by 2030; it is estimated to register a CAGR of 15.3% during 2022–2030. The market's growth is due to the rising prevalence of cancer worldwide and the introduction of technologically advanced systems. Further, cancer screening programs and the implementation of standard guidelines are expected to provide growth opportunities for the market growth. However, the high cost of image-guided radiotherapy treatment will hinder market growth.

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Health systems across the globe are witnessing a substantial increase in the prevalence of cancer. According to the World Health Organization (WHO), in 2019, ~9.6 million deaths were due to cancer across the globe. According to the same source, colorectal, liver, prostate, lung, and stomach cancer are most observed in men, while breast, colorectal, and cervical cancer are the most common among women.

According to Cancer Research UK, in 2020, ~0.16 million people in the UK die each year due to cancer. Cancer is one of the leading reasons of death globally, causing ~10 million deaths in 2020, according to the WHO. The most common forms of cancer in 2020 were breast cancer (2.26 million cases) and lung cancer (2.21 million cases). According to the American Cancer Society, the burden of cancer worldwide is expected to reach ~28.4 million cases by 2040, increased by 47% from 2020, with greater increases in developing countries due to demographic changes. However, this is further compounded by increasing risk factors that can be exacerbated by globalization and a growing economy. The Global Cancer Observatory (GLOBOCAN) estimates that there were 19.3 million cases of cancer worldwide in 2020. GLOBOCAN predicted that cancer cases in India would rise to 2.08 million in 2040 compared to 2020, an increase of 57.5%. According to WHO, nearly 2.3 million women worldwide were detected with breast cancer, and ~685,000 deaths were registered due to the same in 2020. According to Advocate Health Care, over 60% of cancer patients undergo some form of radiation therapy as part of their treatment. This is because radiation therapy is very effective in fighting several types of cancer as it destroys the cancer cell's ability to reproduce. Image-guided radiotherapy allows the radiation therapist to locate the target area better and direct the beam of radiation at the tumor immediately before or even during treatment. Thus, the high prevalence of cancer is anticipated to drive the adoption of image-guided radiotherapy.

According to data published by the WHO in March 2021, over 50% of cancer patients involve radiotherapy as part of cancer management and care. Moreover, according to the same data, radiotherapy is prominently used to treat the most common types of cancer, such as colorectal, lung, breast, and cervical cancer. From the patient's point of view, early detection and diagnosis can prevent unnecessary pain and suffering. It can also reduce the scale and cost of treatment. Further, government awareness will propel the market. For instance, Public Health England, in partnership with the Department of Health and NHS England, leads the “Be Clear on Cancer” program. The program aims to improve early diagnosis of cancer by increasing public awareness of the signs and symptoms of cancer and further urging people to see their doctors without delay.

Introduction of Technologically Advanced Systems Fuels Image-Guided Radiotherapy

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Market Growth

Imaging is a fundamental part of the diagnostic process. From ultrasounds to MRIs and CT scans, radiologists use medical imaging to diagnose and treat diseases properly. Also, doctors use imaging technologies to determine whether a particular therapy has effectively treated a patient. Over the past couple of decades, the capabilities of imaging have radically increased. Numerous advancements in imaging technologies have occurred. This progress is important in providing accurate diagnoses and bettering patient care. These advancements and the power of AI and digital technology raise better procedural efficiency in providing and accomplishing patient care. Artificial intelligence (AI) helps improve various parts of the healthcare industry, medical imaging technology being one of the fields benefiting greatly. AI is being used in advanced imaging devices, which can help detect diseases earlier and guide them during diagnosis and early treatment.

In August 2021, Manipal Hospitals, India's second largest multi-specialty hospital, launched an advanced Radixact system equipped with Synchrony Automatic, real-time motion synchronization technology for precisely treating cancer patients. Philips expanded the company's mobile C-arm portfolio through Zenition 10 in 2023. In 2023, GE Healthcare expanded PET/MR capabilities with AIR technologies to improve diagnostic precision, treatment evaluation, and patient comfort. In 2023, the launch of Pixxoscan expanded GE Healthcare's MRI contrast agent portfolio. In February 2022, the Department of Radiation Oncology at Max Institute of Cancer Care (MICC), Saket, India, launched Radixact X9 Tomotherapy, combined with the 2nd Generation Synchronized Respiratory Motion Management System. This radiation therapy treatment for cancer patients uses artificial intelligence (AI)-based real-time tracking and treatment delivery to ensure that the tumor is not missed due to chest or abdominal breathing movement during radiation treatment. In September 2021, SkinCure Oncology announced positive clinical trial results, demonstrating positive data (99.3% cure rate) for image-guided superficial radiotherapy (IGSRT) in the treatment of basal cell carcinoma (BCC) and squamous cell carcinoma (SCC). Therefore, such technological advancements are expected to drive the growth of the image-guided radiotherapy market.

Type-Based Insights

The image-guided radiotherapy market is segmented into product and services based on type. The product segment held the largest market share in 2022. The services segment is anticipated to register the highest CAGR of 15.5% during 2022–2030.

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Increasing awareness about radiation therapy has increased the demand for radiotherapy equipment such as linear accelerators (LINAC) and MRI-LINAC, which help deliver the therapy to large patient populations. Moreover, there has been tremendous growth in oncology centers, further generating the demand for radiotherapy equipment, driving the product segment and contributing to the image-guided radiotherapy market growth.

Application-Based Insights

Based on application, the image-guided radiotherapy market is segmented into breast cancer, lung cancer, gastrointestinal cancer, prostate cancer, gynecological cancers, head and neck cancer, and others. The breast cancer segment held the largest market share in 2022. The lung cancer segment is anticipated to register the highest CAGR of 16.3% during 2022–2030.

Imaging Type -Based Insights

Based on imaging type, the image-guided radiotherapy market is segmented into magnetic resonance imaging (MRI), positron emission tomography (PET), computed tomography (CT) imaging, and others. The magnetic resonance imaging (MRI) segment held the largest market share in 2022. The computed tomography (CT) imaging segment is anticipated to register the highest CAGR of 15.8% from 2022 to 2030.

End User-Based Insights

Based on the end user, the image-guided radiotherapy market is segmented into hospitals, oncology centers, and radiotherapy centers. The hospitals segment held the largest market share in 2022. The oncology centers segment is anticipated to register the highest CAGR of 16.0% during 2022–2030.

Leading players are implementing strategies such as expanding and diversifying their market presence, launching new products, and acquiring a new customer base to tap prevailing business opportunities.

In May 2023, Philips expanded its mobile C-arm portfolio with Zenition 10.

In April 2023, GE HealthCare expanded its portfolio of magnetic resonance imaging (MRI) contrast agents with the launch of Pixxoscan. It provides customers access to two leading macrocyclic molecules: Clariscan (gadoteric

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acid) and Pixxoscan (gadobutrol).

In June 2023, GE HealthCare announced its plans to expand its PET/MR capabilities with AIR technologies to improve diagnostic precision and simplify treatment evaluation while increasing patient comfort.

In September 2022, the National Medical Products Administration (NMPA), China's regulatory authority, approved the sale and use of ViewRay's MRIdian MRI-guided radiation therapy system.

In March 2022, Hwasun Hospital of Chonnam National University introduced the 'Halcyon 3.0' radiotherapy system and used it for comprehensive treatment. Halcyon 3.0 is a state-of-the-art radiation cancer treatment device that can deliver intensity-modulated radiation therapy based on real-time image guidance.

The US Food and Drug Administration, Centers for Disease Control and Prevention (CDC), and Global Burden of Disease Study are the primary and secondary sources referred to while preparing the image-guided radiotherapy market report.

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