

**Image-Guided Radiation Therapy Market by Product (4D RT, LINAC, MRI-guided radiotherapy, Portal CT Imaging), Procedure (IMRT, Stereotactic, Particle), Application (Neck, Prostate, Breast cancer), Enduser (Hospital, ACC) & Region - Global Forecasts to 2028**

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**Report description:**

The global image-guided radiation therapy market is projected to reach USD 2.4 billion by 2028 from USD 1.9 billion in 2023, growing at a CAGR of 5.2% during the forecast period. The projected surge in market growth for image-guided radiation therapy (IGRT) is underpinned by a confluence of compelling advantages. Notably, IGRT's capacity to achieve exceptional precision in tumor targeting, coupled with its ability to mitigate collateral damage to healthy tissues, stands as a pivotal driver. Furthermore, the escalating global incidence of cancer amplifies the demand for advanced treatment modalities, with IGRT positioned as a forefront solution. This convergence of factors is poised to usher in a phase of robust expansion within the market, consequently shaping the landscape of IGRT adoption in the forthcoming forecasting years.

"LINAC (linear accelerator) segment to register largest market share in 2022-2028."

Based on the product, the image-guided radiation therapy market is segmented into 4D gating/ 4D RT, LINAC (linear accelerator), PET/ MRI-guided radiation therapy, CT scanning and portal imaging. LINAC (linear accelerator) segment to register the largest market share over the forecast period of 2022-2028. The realm of LINAC technology is marked by continuous evolution, characterized by progressive innovations encompassing imaging modalities, dose delivery methodologies, and treatment validation approaches. This evolutionary trajectory significantly contributes to the perpetual advancement of image-guided radiation therapy (IGRT), thereby playing a pivotal role in amplifying its market presence and prominence.

"The Prostate cancer application segment to register highest CAGR over the forecast period of 2023-2028."

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Based on the application, the image-guided radiation therapy market is segmented into prostate cancer, lung cancer, head & neck cancer, breast cancer, gastrointestinal cancer, gynecological cancer, and other applications. The rising worldwide prevalence of prostate cancer has catalyzed a discernible surge in the need for advanced and effective treatment methodologies. Within this framework, image-guided radiation therapy (IGRT) assumes a pivotal stance, proffering meticulous tumor targeting founded on precision and augmenting therapeutic outcomes. This escalating requirement for elevated treatment sophistication seamlessly converges with the inherent attributes of IGRT, thereby substantiating its central position in propelling market expansion within the sphere of prostate cancer radiation therapy.

"The Stereotactic therapy procedure segment accounted for the highest CAGR of the image-guided radiation therapy market over the forecasting period."

Based on the procedure, the image-guided radiation therapy market is segmented into 3D conformal therapy, IMRT, stereotactic therapy, particle therapy and proton beam therapy. The stereotactic therapy procedure segment exhibited the most substantial Compound Annual Growth Rate (CAGR) within the image-guided radiation therapy market over the projected forecasting period. Stereotactic therapy possesses distinct qualities, notably its abbreviated treatment duration and elevated precision, which notably elevate the comfort levels of patients undergoing radiation therapy. This enhancement in the holistic treatment experience aligns seamlessly with the patient-centric philosophy that underscores image-guided radiation therapy (IGRT). The convergence of these attributes not only cultivates positive patient outcomes but also amplifies IGRT's appeal within the market landscape, consequently fostering heightened adoption rates and a more pronounced market presence.

"Hospitals' segment to register for the largest market share of the image-guided radiation therapy market in 2022-2028."

The major end users in the image-guided radiation therapy market are hospitals. The hospital end-user segment is estimated to hold a significant market share of the image-guided radiation therapy market during the forecast period. Hospitals, characterized by their capacity to provide a comprehensive array of medical services within a singular facility, confer a distinctive convenience to patients undergoing image-guided radiation therapy (IGRT). This convenience stems from the consolidation of diverse medical needs under one roof, thereby mitigating the necessity for patients to seek multiple appointments at disparate venues. This strategic amalgamation of services not only streamlines patient care but also augments the attractiveness of IGRT as a preferred treatment option. As a result, this seamless alignment of convenience and comprehensive care significantly contributes to the advancement and prominence of the image-guided radiation therapy market within hospital settings.

Technological Advances: Hospitals frequently maintain cutting-edge infrastructure and technological capabilities essential for the successful integration of image-guided radiation therapy (IGRT), thus assuring the ready availability of requisite resources. This pivotal attribute distinctly contributes to the advancement and fortification of the image-guided radiation therapy market.

"Asia Pacific to register significant growth rate in the market during the forecast period."

For the forecasting period 2023-2028, the APAC region is expected to register a significant growth rate in the market during the forecast period. Asia Pacific comprises India, China, Japan, Australia, South Korea, and RoAPAC. The Asia-Pacific (APAC) region has witnessed a significant increase in the market growth rate for image-guided radiation therapy. There are several drivers that contributed to this growth:

The maturing demographic profile observed in APAC countries accentuates the imperative for efficacious cancer treatment modalities characterized by minimized treatment-related adverse effects. This resonance with the precision-driven attributes of image-guided radiation therapy (IGRT) substantiates its pivotal role in enhancing the market landscape.

The incorporation of multilingual patient care offerings within APAC hospitals, combined with the accessibility to advanced treatments like image-guided radiation therapy (IGRT), confers a unique allure to the region, particularly among a diverse patient spectrum. This fusion of linguistic inclusiveness and state-of-the-art medical interventions significantly enhances the region's desirability as a favored healthcare destination, thereby fortifying its competitive position within the healthcare market landscape and concomitantly propelling the prominence of IGRT.

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

- By Company Type: Tier 1-40%, Tier 2-30%, and Tier 3- 30%
- By Designation: C-level-27%, Director-level-18%, and Others-55%
- By Region: North America-50%, Europe-20%, Asia Pacific-15%, Latin America-10%, and the Middle East & Africa-5%

Prominent players in this market are Siemens Healthineers AG (Germany), Elekta (Sweden), Accuray Incorporated (US), GE Healthcare Company (US), and Hitachi (Japan), among others.

#### Research Coverage

- The report studies the image-guided radiation therapy market based on products, procedures, applications, end users, and regions.
- The report analyzes factors (such as drivers, restraints, opportunities, and challenges) affecting the market growth.
- The report evaluates the opportunities and challenges in the market for stakeholders and provides details of the competitive landscape for market leaders.
- The report studies micro markets with respect to their growth trends, prospects, and contributions to the global image-guided radiation therapy market.
- The report forecasts the revenue of market segments with respect to five major regions.

#### Key Benefits of Buying the Report:

The report will help the market leaders/new entrants/smaller firms in this market with investment evaluation viability within the image-guided radiation therapy market through a thorough analysis of comprehensive data, thereby facilitating robust risk assessment and enabling well-informed investment determinations. Benefit from meticulous market segmentation encompassing application, end-user, and regional dimensions, affording tailored insights for precise segment targeting. The report also provides an all-encompassing evaluation of encapsulating pivotal trends, growth catalysts, challenges, and prospects, thereby empowering strategic decision-making with astute discernment.

The report provides insights on the following pointers:

- Analysis of key drivers (increasing prevalence of cancer patient population, Increasing government initiatives for cancer management, advancements in non-invasive treatments through radiation therapy), restraints (Dearth of skilled radiologist/oncologist, high cost of image-guided radiation therapy treatment, Complexity of imaging technology for treatments), opportunities (Expansion of key players in emerging countries, Rising healthcare expenditure across developing countries), and challenges (Availability of alternative technology) influencing the growth of the image-guided radiation therapy market
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the image-guided radiation therapy market.
- Market Development: Comprehensive information about lucrative markets - the report analyses the image-guided radiation therapy market across varied regions.
- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the image-guided radiation therapy market
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Siemens Healthineers AG (Germany), Elekta (Sweden), and Accuray Incorporated (US), among others.

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