

**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**

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**Report description:**

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

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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

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- 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.

## Table of Contents:

1	INTRODUCTION	22
1.1	STUDY OBJECTIVES	22
1.2	MARKET DEFINITION	22
1.2.1	INCLUSIONS AND EXCLUSIONS	22
1.3	MARKET SCOPE	23
1.3.1	MARKETS COVERED	23
1.3.2	GEOGRAPHIES COVERED	23
1.3.3	YEARS CONSIDERED	24
1.3.4	CURRENCY CONSIDERED	24
1.4	LIMITATIONS	24
1.5	MARKET STAKEHOLDERS	25
1.5.1	RECESSION IMPACT	25
2	RESEARCH METHODOLOGY	26
2.1	RESEARCH DATA	26
2.2	RESEARCH DESIGN	27
2.2.1	SECONDARY RESEARCH	27
2.2.2	PRIMARY RESEARCH	29
2.2.2.1	Primary sources	29
2.2.2.2	Key data from secondary sources	30
2.2.2.3	Breakdown of primaries	30
FIGURE 1	BREAKDOWN OF PRIMARY INTERVIEWS: SUPPLY-SIDE AND DEMAND-SIDE PARTICIPANTS	30
FIGURE 2	BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION	31
2.3	MARKET SIZE ESTIMATION	31
FIGURE 3	RESEARCH METHODOLOGY: HYPOTHESIS BUILDING	32
2.3.1	BOTTOM-UP APPROACH	32
2.3.1.1	Approach 1: Company revenue estimation approach	33
FIGURE 4	MARKET SIZE ESTIMATION FOR ROBOTIC RADIOTHERAPY: APPROACH 1 (COMPANY REVENUE ESTIMATION)	33
2.3.1.2	Approach 2: Customer-based market estimation	33
FIGURE 5	ROBOTIC RADIOTHERAPY MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH	34
2.3.1.3	Approach 3: Top-down approach	34
2.3.1.4	Approach 4: Primary interviews	34
2.3.2	TOP-DOWN APPROACH	35
2.4	DATA VALIDATION APPROACH	37
FIGURE 6	DATA TRIANGULATION METHODOLOGY	37
2.5	MARKET SHARE ASSESSMENT	38
2.6	STUDY ASSUMPTIONS	38
2.7	RISK ASSESSMENT	38

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TABLE 1	LIMITATIONS AND ASSOCIATED RISKS	38
2.8	GROWTH RATE ASSUMPTIONS	38
2.9	RECESSION IMPACT ANALYSIS	39
3	EXECUTIVE SUMMARY	40
FIGURE 7	ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2023 VS. 2028 (USD MILLION)	40
FIGURE 8	ROBOTIC RADIOTHERAPY MARKET, BY APPLICATION, 2023 VS. 2028 (USD MILLION)	41
FIGURE 9	ROBOTIC RADIOTHERAPY MARKET, BY TECHNOLOGY, 2023 VS. 2028 (USD MILLION)	41
FIGURE 10	ROBOTIC RADIOTHERAPY MARKET, BY END USER, 2023 VS. 2028 (USD MILLION)	42
FIGURE 11	GEOGRAPHICAL SNAPSHOT: ROBOTIC RADIOTHERAPY MARKET	43
4	PREMIUM INSIGHTS	44
4.1	ROBOTIC RADIOTHERAPY MARKET OVERVIEW	44
FIGURE 12	INCREASING GERIATRIC POPULATION AND GROWING R&D INVESTMENTS TO DRIVE MARKET	44
4.2	ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2023 VS. 2028 (USD MILLION)	45
FIGURE 13	RADIOTHERAPY SYSTEMS TO DOMINATE MARKET IN 2028	45
4.3	NORTH AMERICA: ROBOTIC RADIOTHERAPY MARKET, BY COUNTRY AND END USER, 2022 (USD MILLION)	45
FIGURE 14	HOSPITALS DOMINATED END-USER MARKET IN 2022	45
4.4	ROBOTIC RADIOTHERAPY MARKET: COMPARISON OF COUNTRY-WISE GROWTH RATES	46
FIGURE 15	INDIA AND CHINA TO SHOW HIGHEST GROWTH DURING FORECAST PERIOD	46
5	MARKET OVERVIEW	47
5.1	INTRODUCTION	47
5.2	MARKET DYNAMICS	47
FIGURE 16	ROBOTIC RADIOTHERAPY MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES	47
5.2.1	DRIVERS	48
5.2.1.1	Rising prevalence of cancer	48
TABLE 2	PROJECTED INCREASE IN CANCER CASES, 2020-2040	48
5.2.1.2	Growing demand for noninvasive treatment	48
5.2.2	RESTRAINTS	49
5.2.2.1	Premium Product Pricing	49
5.2.2.2	Complexities associated with automated/robotic radiotherapy	49
5.2.3	OPPORTUNITIES	50
5.2.3.1	Rising healthcare expenditure across emerging economies	50
5.2.3.2	Government and private investments to boost cancer treatment availability	50
5.2.4	CHALLENGES	51
5.2.4.1	Risk of radiation exposure	51
5.2.4.2	Dearth of skilled personnel	51
5.3	TECHNOLOGY ANALYSIS	52
5.4	PORTER'S FIVE FORCES ANALYSIS	52
TABLE 3	ROBOTIC RADIOTHERAPY MARKET: PORTER'S FIVE FORCES ANALYSIS	52
5.4.1	THREAT OF NEW ENTRANTS	52
5.4.2	THREAT OF SUBSTITUTES	53
5.4.3	BARGAINING POWER OF SUPPLIERS	53
5.4.4	BARGAINING POWER OF BUYERS	53
5.4.5	INTENSITY OF COMPETITIVE RIVALRY	53
5.5	KEY STAKEHOLDERS AND BUYING CRITERIA	53
5.5.1	KEY STAKEHOLDERS IN BUYING PROCESS	53
FIGURE 17	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS OF RADIOTHERAPY SYSTEMS	53
TABLE 4	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR KEY PRODUCT SEGMENTS (%)	54

5.6	REGULATORY ANALYSIS	54
5.6.1	US	54
TABLE 5 US: MEDICAL DEVICE REGULATORY APPROVAL PROCESS		
5.6.2	EUROPE	55
5.6.3	JAPAN	55
TABLE 6 JAPAN: MEDICAL DEVICE CLASSIFICATION UNDER PMDA		
5.7	REIMBURSEMENT SCENARIO	56
TABLE 7 CPT CODES FOR IMRT		
TABLE 8 CPT CODES FOR SBRT		
TABLE 9 CPT CODES FOR PROTON BEAM THERAPY		
TABLE 10 FREESTANDING PER COURSE NATIONAL AVERAGE MEDICARE REIMBURSEMENT, 2021 VS 2022		
TABLE 11 PROPOSED AMBULATORY PAYMENT CLASSIFICATION 2023 RATES		
TABLE 12 IMPACT OF CLINICAL LABOR PRICE CHANGES ON RADIATION ONCOLOGY SERVICES		
5.8	ECOSYSTEM ANALYSIS	59
5.9	VALUE CHAIN ANALYSIS	60
5.9.1	RESEARCH & DEVELOPMENT	60
5.9.2	PROCUREMENT AND PRODUCT DEVELOPMENT	60
5.9.3	MARKETING, SALES & DISTRIBUTION, AND POST-SALES SERVICES	60
FIGURE 18 VALUE CHAIN ANALYSIS IN ROBOTIC RADIOTHERAPY MARKET		
5.10	SUPPLY CHAIN ANALYSIS	62
5.10.1	PROMINENT COMPANIES	62
5.10.2	SMALL & MEDIUM-SIZED COMPANIES	62
5.10.3	END USERS	62
FIGURE 19 SUPPLY CHAIN ANALYSIS OF ROBOTIC RADIOTHERAPY MARKET		
5.11	PRICING ANALYSIS	63
TABLE 13 PRICING ANALYSIS OF RADIOTHERAPY SYSTEMS (USD)		
5.12	PATENT ANALYSIS	64
FIGURE 20 TOP TEN PATENT APPLICANTS FOR RADIOTHERAPY (JANUARY 2012 TO JUNE 2022)		
FIGURE 21 TOP TEN PATENT INVENTORS FOR RADIOTHERAPY (JANUARY 2012 TO JUNE 2023)		
FIGURE 22 TOP TEN PATENT OWNERS FOR RADIOTHERAPY (JANUARY 2012 TO JUNE 2023)		
5.13	TRADE ANALYSIS	65
TABLE 14 IMPORT DATA FOR RADIOTHERAPY SYSTEMS (HS CODE 9022), BY COUNTRY, 2018-2022 (USD THOUSAND)		
TABLE 15 EXPORT DATA FOR RADIOTHERAPY SYSTEMS (HS CODE 9022), BY COUNTRY, 2018-2022 (USD THOUSAND)		
5.14	KEY CONFERENCES AND EVENTS IN 2022-2023	67
TABLE 16 ROBOTIC RADIOTHERAPY MARKET: DETAILED LIST OF KEY CONFERENCES AND EVENTS IN 2022-2023		
5.15	TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES	68
FIGURE 23 EMERGING TRENDS AND OPPORTUNITIES AFFECTING FUTURE REVENUE MIX		
6 ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT		
6.1	INTRODUCTION	70
TABLE 17 ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)		
6.2	RADIOTHERAPY SYSTEMS	70
6.2.1	RISE IN USE OF AI AND AUTOMATION TO DRIVE MARKET	70
TABLE 18 RADIOTHERAPY SYSTEMS MARKET, BY REGION, 2020-2028 (USD MILLION)		
6.3	SOFTWARE	71
6.3.1	NEED TO ENSURE TREATMENT EFFECTIVENESS AND ACCURACY TO BOOST GROWTH	71
TABLE 19 SOFTWARE MARKET, BY REGION, 2020-2028 (USD MILLION)		
6.4	3D CAMERAS	72

#### 6.4.1 GROWING USE OF SGRT TO DRIVE DEMAND 72

TABLE 20 3D CAMERAS MARKET, BY REGION, 2020-2028 (USD MILLION) 72

#### 6.5 OTHER PRODUCTS 73

TABLE 21 OTHER ROBOTIC RADIOTHERAPY MARKET, BY REGION, 2020-2028 (USD MILLION) 73

#### 7 ROBOTIC RADIOTHERAPY MARKET, BY TECHNOLOGY 74

##### 7.1 INTRODUCTION 75

TABLE 22 ROBOTIC RADIOTHERAPY MARKET, BY TECHNOLOGY, 2020-2028 (USD MILLION) 75

##### 7.2 LINEAR ACCELERATORS 75

TABLE 23 LINEAR ACCELERATORS MARKET, BY TYPE, 2020-2028 (USD MILLION) 75

##### 7.2.1 CONVENTIONAL LINEAR ACCELERATORS 76

###### 7.2.1.1 Longer treatment duration to limit adoption 76

###### 7.2.2 MRI LINEAR ACCELERATORS 76

###### 7.2.2.1 Rising awareness about benefits to enhance demand 76

##### 7.3 STEREOTACTIC RADIATION THERAPY 76

TABLE 24 STEREOTACTIC RADIATION THERAPY MARKET, BY TYPE, 2020-2028 (USD MILLION) 77

##### 7.3.1 CYBERKNIFE 77

###### 7.3.1.1 Precision and correction capabilities to boost adoption 77

###### 7.3.2 GAMMA KNIFE 77

###### 7.3.2.1 Ongoing product development to drive market 77

##### 7.4 PARTICLE THERAPY SYSTEMS 78

TABLE 25 PARTICLE THERAPY SYSTEMS MARKET, BY TYPE, 2020-2028 (USD MILLION) 78

##### 7.4.1 PROTON BEAM THERAPY 78

###### 7.4.1.1 Rising establishment of proton therapy cancer centers to drive market 78

##### 7.4.2 HEAVY ION THERAPY 79

###### 7.4.2.1 Limited number of facilities to slow growth 79

#### 8 ROBOTIC RADIOTHERAPY MARKET, BY APPLICATION 80

##### 8.1 INTRODUCTION 81

TABLE 26 ROBOTIC RADIOTHERAPY MARKET, BY APPLICATION, 2020-2028 (USD MILLION) 81

##### 8.2 LUNG CANCER 81

###### 8.2.1 LUNG CANCER TO DOMINATE APPLICATIONS MARKET 81

TABLE 27 ROBOTIC RADIOTHERAPY MARKET FOR LUNG CANCER, BY REGION, 2020-2028 (USD MILLION) 82

##### 8.3 BREAST CANCER 82

###### 8.3.1 INCREASING INCIDENCE OF BREAST CANCER TO DRIVE MARKET 82

TABLE 28 ROBOTIC RADIOTHERAPY MARKET FOR BREAST CANCER, BY REGION, 2020-2028 (USD MILLION) 82

##### 8.4 PROSTATE CANCER 83

###### 8.4.1 PREFERENCE FOR NONINVASIVE TREATMENT TO BOOST GROWTH 83

TABLE 29 ROBOTIC RADIOTHERAPY MARKET FOR PROSTATE CANCER, BY REGION, 2020-2028 (USD MILLION) 83

##### 8.5 HEAD & NECK CANCER 83

###### 8.5.1 GROWING UTILIZATION OF CYBERKNIFE FOR TREATMENT TO DRIVE MARKET 83

TABLE 30 ROBOTIC RADIOTHERAPY MARKET FOR HEAD & NECK CANCER, BY REGION, 2020-2028 (USD MILLION) 84

##### 8.6 COLORECTAL CANCER 84

###### 8.6.1 RISING INCIDENCE OF COLORECTAL CANCER TO SUPPORT GROWTH 84

TABLE 31 ROBOTIC RADIOTHERAPY MARKET FOR COLORECTAL CANCER, BY REGION, 2020-2028 (USD MILLION) 85

##### 8.7 OTHER CANCERS 85

TABLE 32 ROBOTIC RADIOTHERAPY MARKET FOR OTHER CANCERS, BY REGION, 2020-2028 (USD MILLION) 85

#### 9 ROBOTIC RADIOTHERAPY MARKET, BY END USER 86

##### 9.1 INTRODUCTION 87

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TABLE 33	ROBOTIC RADIOTHERAPY MARKET, BY END USER, 2020-2028 (USD MILLION)	87
9.2	HOSPITALS	87
9.2.1	LARGE NUMBER OF SURGICAL AND DIAGNOSTIC PROCEDURES TO PROPEL MARKET	87
TABLE 34	ROBOTIC RADIOTHERAPY MARKET FOR HOSPITALS, BY REGION, 2020-2028 (USD MILLION)	88
9.3	INDEPENDENT RADIOTHERAPY CENTERS	88
9.3.1	LIMITED SURGICAL CAPABILITIES OF AVAILABLE PRODUCTS TO RESTRAIN ADOPTION	88
TABLE 35	ROBOTIC RADIOTHERAPY MARKET FOR INDEPENDENT RADIOTHERAPY CENTERS, BY REGION, 2020-2028 (USD MILLION)	88
10	ROBOTIC RADIOTHERAPY MARKET, BY REGION	89
10.1	INTRODUCTION	90
TABLE 36	ROBOTIC RADIOTHERAPY MARKET, BY REGION, 2020-2028 (USD MILLION)	90
10.2	NORTH AMERICA	90
10.2.1	NORTH AMERICA: RECESSION IMPACT	90
FIGURE 24	NORTH AMERICA: ROBOTIC RADIOTHERAPY MARKET SNAPSHOT	91
TABLE 37	NORTH AMERICA: ROBOTIC RADIOTHERAPY MARKET, BY COUNTRY, 2020-2028 (USD MILLION)	92
TABLE 38	NORTH AMERICA: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	92
TABLE 39	NORTH AMERICA: ROBOTIC RADIOTHERAPY MARKET, BY TECHNOLOGY, 2020-2028 (USD MILLION)	92
TABLE 40	NORTH AMERICA: ROBOTIC RADIOTHERAPY MARKET, BY APPLICATION, 2020-2028 (USD MILLION)	93
TABLE 41	NORTH AMERICA: ROBOTIC RADIOTHERAPY MARKET, BY END USER, 2020-2028 (USD MILLION)	93
10.2.2	US	93
10.2.2.1	US to dominate North American market over forecast period	93
TABLE 42	US: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	94
10.2.3	CANADA	94
10.2.3.1	Increasing government initiatives and favorable reimbursement to drive market	94
TABLE 43	CANADA: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	94
10.3	EUROPE	95
10.3.1	EUROPE: RECESSION IMPACT	95
TABLE 44	EUROPE: ROBOTIC RADIOTHERAPY MARKET, BY COUNTRY, 2020-2028 (USD MILLION)	95
TABLE 45	EUROPE: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	96
TABLE 46	EUROPE: ROBOTIC RADIOTHERAPY MARKET, BY TECHNOLOGY, 2020-2028 (USD MILLION)	96
TABLE 47	EUROPE: ROBOTIC RADIOTHERAPY MARKET, BY APPLICATION, 2020-2028 (USD MILLION)	97
TABLE 48	EUROPE: ROBOTIC RADIOTHERAPY MARKET, BY END USER, 2020-2028 (USD MILLION)	97
10.3.2	GERMANY	97
10.3.2.1	Increasing aging population and rising life expectancy to drive market	97
TABLE 49	GERMANY: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	98
10.3.3	FRANCE	98
10.3.3.1	Well-developed healthcare sector and rising geriatric population to drive market	98
TABLE 50	FRANCE: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	98
10.3.4	UK	99
10.3.4.1	High burden of chronic diseases to support adoption	99
TABLE 51	UK: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	99
10.3.5	ITALY	99
10.3.5.1	Increasing geriatric population to drive market	99
TABLE 52	ITALY: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	99
10.3.6	SPAIN	100
10.3.6.1	Technological developments in healthcare to drive market	100
TABLE 53	SPAIN: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	100

10.3.7	REST OF EUROPE	100
TABLE 54	REST OF EUROPE: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	101
10.4	ASIA PACIFIC	101
10.4.1	ASIA PACIFIC: RECESSION IMPACT	101
FIGURE 25	ASIA PACIFIC: ROBOTIC RADIOTHERAPY MARKET SNAPSHOT	102
TABLE 55	ASIA PACIFIC: ROBOTIC RADIOTHERAPY MARKET, BY COUNTRY, 2020-2028 (USD MILLION)	103
TABLE 56	ASIA PACIFIC: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	103
TABLE 57	ASIA PACIFIC: ROBOTIC RADIOTHERAPY MARKET, BY TECHNOLOGY, 2020-2028 (USD MILLION)	104
TABLE 58	ASIA PACIFIC: ROBOTIC RADIOTHERAPY MARKET, BY APPLICATION, 2020-2028 (USD MILLION)	104
TABLE 59	ASIA PACIFIC: ROBOTIC RADIOTHERAPY MARKET, BY END USER, 2020-2028 (USD MILLION)	105
10.4.2	JAPAN	105
10.4.2.1	Rising geriatric population and surgical procedures to drive market	105
TABLE 60	JAPAN: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	105
10.4.3	CHINA	106
10.4.3.1	Developing healthcare infrastructure to drive market	106
TABLE 61	CHINA: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	106
10.4.4	INDIA	106
10.4.4.1	Rising awareness and government support to boost growth	106
TABLE 62	INDIA: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	107
10.4.5	AUSTRALIA	107
10.4.5.1	Well-established healthcare system to favor adoption	107
TABLE 63	AUSTRALIA: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	108
10.4.6	SOUTH KOREA	108
10.4.6.1	Growing target patient population to drive market	108
TABLE 64	SOUTH KOREA: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	108
10.4.7	REST OF ASIA PACIFIC	109
TABLE 65	REST OF ASIA PACIFIC: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	109
10.5	REST OF THE WORLD	109
10.5.1	REST OF THE WORLD: RECESSION IMPACT	109
TABLE 66	REST OF THE WORLD: ROBOTIC RADIOTHERAPY MARKET, BY PRODUCT, 2020-2028 (USD MILLION)	110
TABLE 67	REST OF THE WORLD: ROBOTIC RADIOTHERAPY MARKET, BY TECHNOLOGY, 2020-2028 (USD MILLION)	110
TABLE 68	REST OF THE WORLD: ROBOTIC RADIOTHERAPY MARKET, BY APPLICATION, 2020-2028 (USD MILLION)	111
TABLE 69	REST OF THE WORLD: ROBOTIC RADIOTHERAPY MARKET, BY END USER, 2020-2028 (USD MILLION)	111
11	COMPETITIVE LANDSCAPE	112
11.1	OVERVIEW	112
11.2	KEY PLAYER STRATEGIES	112
FIGURE 26	KEY DEVELOPMENTS IN ROBOTIC RADIOTHERAPY MARKET (2019 TO 2023)	113
11.3	REVENUE ANALYSIS	114
FIGURE 27	REVENUE ANALYSIS OF TOP FIVE PLAYERS (2019-2022)	114
11.4	MARKET SHARE ANALYSIS: ROBOTIC RADIOTHERAPY MARKET, BY KEY PLAYER (2022)	114
FIGURE 28	ROBOTIC RADIOTHERAPY MARKET SHARE, BY KEY PLAYER, 2022	114
TABLE 70	ROBOTIC RADIOTHERAPY MARKET: DEGREE OF COMPETITION	115
11.5	COMPANY EVALUATION MATRIX (2022)	116
11.5.1	STARS	116
11.5.2	PERVASIVE PLAYERS	116
11.5.3	EMERGING LEADERS	116
11.5.4	PARTICIPANTS	116



FIGURE 29	ROBOTIC RADIOTHERAPY MARKET: COMPANY EVALUATION MATRIX, 2022	117
11.6	COMPANY EVALUATION MATRIX FOR START-UPS/SMES (2022)	118
11.6.1	PROGRESSIVE COMPANIES	118
11.6.2	DYNAMIC COMPANIES	118
11.6.3	RESPONSIVE COMPANIES	118
11.6.4	STARTING BLOCKS	118
FIGURE 30	COMPANY EVALUATION MATRIX FOR START-UPS/SMES, 2022	119
11.7	COMPETITIVE BENCHMARKING	120
11.7.1	OVERALL COMPANY FOOTPRINT	120
TABLE 71	OVERALL FOOTPRINT ANALYSIS: ROBOTIC RADIOTHERAPY MARKET	120
11.7.2	COMPANY PRODUCT FOOTPRINT	121
TABLE 72	PRODUCT FOOTPRINT ANALYSIS: ROBOTIC RADIOTHERAPY MARKET	121
11.7.3	COMPANY REGIONAL FOOTPRINT	122
TABLE 73	REGIONAL FOOTPRINT ANALYSIS: ROBOTIC RADIOTHERAPY MARKET	122
11.8	COMPETITIVE SCENARIO (2019-2023)	123
11.8.1	PRODUCT LAUNCHES & APPROVALS	123
11.8.2	DEALS	123
11.8.3	OTHER DEVELOPMENTS	124
12	COMPANY PROFILES	125
12.1	KEY PLAYERS	125
	(Business Overview, Products/Services/Solutions Offered, Recent Developments, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats)*	
12.1.1	SIEMENS HEALTHINEERS AG (VARIAN MEDICAL SYSTEMS, INC.)	125
TABLE 74	SIEMENS HEALTHINEERS AG: COMPANY OVERVIEW	125
FIGURE 31	SIEMENS HEALTHINEERS AG: COMPANY SNAPSHOT (2022)	126
12.1.2	ELEKTA	133
TABLE 75	ELEKTA: COMPANY OVERVIEW	133
FIGURE 32	ELEKTA: COMPANY SNAPSHOT (2022)	134
12.1.3	ACCURAY INCORPORATED	140
TABLE 76	ACCURAY INCORPORATED: COMPANY OVERVIEW	140
FIGURE 33	ACCURAY INCORPORATED: COMPANY SNAPSHOT (2022)	141
12.1.4	VIEWRAY TECHNOLOGIES, INC.	145
TABLE 77	VIEWRAY TECHNOLOGIES, INC.: COMPANY OVERVIEW	145
FIGURE 34	VIEWRAY TECHNOLOGIES, INC.: COMPANY SNAPSHOT (2022)	146
12.1.5	C-RAD	150
TABLE 78	C-RAD: COMPANY OVERVIEW	150
FIGURE 35	C-RAD: COMPANY SNAPSHOT (2022)	151
12.1.6	IBA	153
TABLE 79	IBA: COMPANY OVERVIEW	153
FIGURE 36	IBA: COMPANY SNAPSHOT (2022)	154
12.1.7	HITACHI LTD.	157
TABLE 80	HITACHI LTD.: COMPANY OVERVIEW	157
FIGURE 37	HITACHI LTD.: COMPANY SNAPSHOT (2021)	158
12.1.8	MEVION MEDICAL SYSTEMS	160
TABLE 81	MEVION MEDICAL SYSTEMS: COMPANY OVERVIEW	160
12.1.9	PANACEA MEDICAL TECHNOLOGIES PVT. LTD.	163
TABLE 82	PANACEA MEDICAL TECHNOLOGIES PVT. LTD.: COMPANY OVERVIEW	163

12.1.10	P-CURE	164
TABLE 83	P-CURE: COMPANY OVERVIEW	164
12.1.11	PROVISION HEALTHCARE	165
TABLE 84	PROVISION HEALTHCARE: COMPANY OVERVIEW	165
12.1.12	SUMITOMO HEAVY INDUSTRY LTD.	166
TABLE 85	SUMITOMO HEAVY INDUSTRY LTD.: COMPANY OVERVIEW	166
FIGURE 38	SUMITOMO HEAVY INDUSTRIES: COMPANY SNAPSHOT (2021)	167
12.1.13	PHILIPS HEALTHCARE	169
TABLE 86	PHILIPS HEALTHCARE: COMPANY OVERVIEW	169
FIGURE 39	PHILIPS HEALTHCARE: COMPANY SNAPSHOT (2022)	170
12.1.14	RAYSEARCH LABORATORIES	172
TABLE 87	RAYSEARCH LABORATORIES: COMPANY OVERVIEW	172
FIGURE 40	RAYSEARCH LABORATORIES: COMPANY SNAPSHOT (2022)	173
12.1.15	PROTOM INTERNATIONAL, INC.	176
TABLE 88	PROTOM INTERNATIONAL, INC.: COMPANY OVERVIEW	176
12.1.16	OPTIVUS PROTON THERAPY, INC.	177
TABLE 89	OPTIVUS PROTON THERAPY, INC.: COMPANY OVERVIEW	177
12.1.17	TOSHIBA CORPORATION	178
TABLE 90	TOSHIBA CORPORATION: COMPANY OVERVIEW	178
FIGURE 41	TOSHIBA CORPORATION: COMPANY SNAPSHOT (2022)	179
12.1.18	VISION RT LTD.	181
TABLE 91	VISION RT LTD.: COMPANY OVERVIEW	181
12.1.19	ADVANCED ONCOTHERAPY PLC	183
TABLE 92	ADVANCED ONCOTHERAPY PLC: COMPANY OVERVIEW	183
12.1.20	MIM SOFTWARE INC.	184
TABLE 93	MIM SOFTWARE INC.: COMPANY OVERVIEW	184
*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	186
12.2.1	STANDARD IMAGING, INC.	186
12.2.2	BRAINLAB AG	186
12.2.3	MAGNETTX ONCOLOGY SOLUTIONS LTD.	187
12.2.4	PTW FREIBURG GMBH	187
12.2.5	DOSISOFT SA	188
13	APPENDIX	189
13.1	DISCUSSION GUIDE	189
13.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	194
13.3	CUSTOMIZATION OPTIONS	196
13.4	RELATED REPORTS	197
13.5	AUTHOR DETAILS	198

**Robotic Radiotherapy Market Size by Product (System, Software, 3D Camera),  
Technology (LINAC, Stereotactic, Particle Therapy), Application (Lung, Breast,  
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