

India Intraoperative Radiation Therapy Market Assessment, By Products and Services [Products, Services], By Technology [Electron IORT, Intraoperative Brachytherapy], By Application [Breast Cancer, Brain Tumor, Gastrointestinal Cancer, Head and Neck Cancer, Colorectal Cancer, Cervical Cancer, Lung Cancer, Other Cancer Types], By End-user [Hospitals, Specialty Clinics, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

India intraoperative radiation therapy market is projected to witness a CAGR of 7.50% during the forecast period FY2025-FY2032, growing from USD 1.59 million in FY2024 to USD 2.83 million in FY2032. The market's growth is supported by the rising cases of cancer in the country, increasing investments in research and development activities, growing focus on the upgradation of the healthcare sector, and increasing efforts of the leading healthcare companies to boost the availability of advanced treatment solutions. Additionally, the government of India is proactively investing in the upgradation of cancer treatment facilities and healthcare infrastructure to ensure that the patient population has access to advanced care, services, and treatment outcomes are improved. Furthermore, the growing awareness about intraoperative radiation therapies among healthcare professionals and target patient populations is contributing to the increasing acceptance of technology.

Meanwhile, various hospitals across the country are also strengthening their efforts to ensure the availability of novel intraoperative radiation therapies. For instance, in May 2024, Ramaiah Memorial Hospital in Bangalore, Karnataka, successfully conducted two breast conservation cancer surgeries and used an intraoperative radiation therapy x-ray device for delivering precision intraoperative radiation therapy to tumor bed in a single sitting following the surgical resection. Intraoperative radiation therapy. The

therapy in combination with breast conservation surgery provides effective and precise treatment for patients suffering from early-stage breast cancer, improving patient outcomes and reducing the requirement for radiation therapy.

Furthermore, leading Indian healthcare organizations and research institutions are increasingly collaborating for creating cost-efficient and innovative intraoperative radiation therapy solutions, to ensure that a wider group of patients has access to the necessary treatment options. Such efforts are expected to foster innovation in the country and provide lucrative growth opportunities to the India intraoperative radiation therapy market.

Rapid Adoption of Novel Treatment Solutions by Hospitals to Bolster Market Demand

Hospitals and medical centers across the country are increasingly investing towards advanced technologies such as intraoperative radiation therapy procedures to ensure accurate delivery of radiation during surgical procedures, thus enhancing treatment effectiveness by minimizing damage across the surrounding healthy tissues.

For instance, in June 2023, Fortis Hospital in Bangalore successfully conducted India's first novel intraoperative radiation therapy procedure on a patient suffering from recurrent glioblastoma for the past two years. The increasing awareness about the availability of such advanced therapeutic solutions among both healthcare professionals and patients is expected to bolster the India intraoperative radiation therapy market demand.

Increasing Investments in Radiation Therapy Support Market Expansion

Various leading medical institutes in the country are significantly investing towards radiation therapy systems boosting the India intraoperative radiation therapy market size. In November 2023, the Krishna Institute of Medical Sciences in Hyderabad, Telangana ordered a radiation therapy system worth USD 40 million from Elekta Medical Systems India Pvt. Ltd. The available software and devices allow the institute of medical sciences to provide cutting-edge technologies to the patient population and provide them with precise and personalized treatment solutions. Such investments enable medical professionals to ameliorate the quality of life of patients suffering from chronic conditions, ensuring that they are provided with the best possible care available. Thus, bolstering the demand for intraoperative radiation therapy products and services and positively influencing the market's expansion.

Electron IORT to Register Significant Market Growth in the Future

Electron IORT delivers radiation directly to the tumor site during surgery, ensuring precise targeting of malignant tissues while preserving adjacent healthy tissues. This focused method reduces collateral damage, making it particularly beneficial for treating tumors in sensitive areas such as the breast and gastrointestinal tract. One of the major benefits of electron IORT is the reduction in overall treatment duration. By administering radiation during surgery, patients can avoid numerous post-operative radiation sessions. This efficiency is advantageous for both healthcare providers and patients, promoting faster recovery and shorter hospital stays. Clinical studies indicate that electron IORT can result in better local disease control and lower recurrence rates compared to conventional external beam radiation therapy. The ability to deliver a high dose of radiation accurately during surgery improves treatment effectiveness, contributing to its increasing popularity and supporting the expansion of the segment. Growing awareness among healthcare professionals coupled with rising adoption of this treatment in healthcare facilities to drive the segment growth in the market.

Breast Cancer Anticipated to Hold Significant Market Share

The rising prevalence of breast cancer is augmenting the requirement for advanced therapeutic solutions including intraoperative radiation therapies in the country. According to an article published in Cancer (an international interdisciplinary journal of the American Cancer Society) in January 2024, breast cancer is the most common type of cancer in India among women and accounts for around 25% of all cancers in the female population in the country.

Moreover, according to the Globocan (Global Cancer Repository of WHO) data, there were 192,020 breast cancer cases diagnosed in India. Intraoperative radiation therapy has the advantage of potentially reducing non-compliance to post-operative radiation by delivering a single dose at the time of surgery. The therapy offers various benefits to women with breast cancer that have progesterone and estrogen-receptor-positive tumor and provides effective outcomes by eliminating cancer cells immediately after the surgical procedure. Additionally, the radiation is delivered throughout one small session, ensuring the completion of the treatment at a significantly faster rate than traditional radiation.

Future Market Scenario (FY2025 - FY2032F)

- According to India intraoperative radiation therapy market analysis, the market is expected to witness a significant increase in

demand in the coming years due to the rising cases of cancer, increasing investments towards the enhancement of healthcare facilities, and growing public awareness about the various treatments available. As per the estimates of the Global Cancer Observatory (Globocan), cancer cases in India will increase by 57.5% between 2040 and 2020.

-[Integration of advanced technologies such as machine learning and artificial intelligence with intraoperative radiation therapy systems is expected to aid the healthcare industry in increasing the accessibility of treatment solutions in the country.

-[Increasing collaborations between leading players of the market and global healthcare organizations are anticipated to ensure the development of advanced technological solutions, enhancing the quality of care provided to the patient population. -[Investments in training medical professionals would be essential to ensure that they are equipped with the necessary skills to

operate advanced technological solutions.

- The rising number of multispecialty hospitals in the country is expected to bolster the demand for advanced oncology techniques, further providing lucrative growth opportunities to the India intraoperative radiation therapy market.

Key Players Landscape and Outlook

Leading integrated healthcare companies in the country are increasingly working on implementing intraoperative radiation therapies, providing lucrative growth opportunities for the market.

In October 2024, Aster DM Healthcare Limited became the first in the country to implement intraoperative electron, making a significant shift in cancer care. By targeting remaining microscopic cancer cells in quick succession with the tumor removal process, the chances of survival increase significantly along with recovery time. Such efforts to bolster the availability of advanced treatment solutions in India are expected to aid the country in combatting the growing threat of cancer and positively influence the market's expansion.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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