

## About MEDraysintell

MEDraysintell was created in 2013 by Paul-Emmanuel Goethals (CSIntell) and Richard Zimmermann (Chrysalium Consulting). It combines over 40 years of experience in radiotherapy, particle therapy and nuclear medicine.

We aim to form an international team of experts in the field of Medical Radiation industry to provide Strategic Intelligence in nuclear medicine, radiotherapy, proton therapy and brachytherapy to help our clients better understand the markets, competitive environment as well as the potential of merger and acquisitions (M&A) and technology development.

MEDraysintell wants to support in their decisional process manufacturers of radiopharmaceuticals or therapeutic radioisotopes, suppliers of equipment and software as well as investors interested by this industry.

## TEAM

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## Nuclear Medicine

New opportunities lie ahead in nuclear medicine, especially in the radiotherapeutic area with the new products to reach the market before end of 2020.

The global Nuclear Medicine market is expected to reach US\$ 24 billion in 2030, showing an annual average growth of 11%. The diagnostic radiopharmaceutical market is expected to grow, on average, by 6% a year, mainly driven by volume with limited impact from new tracers, while the therapeutic radiopharmaceutical market is expected to grow 26% annually from 2014 to 2030. Nearly 70 companies are active in the global nuclear medicine market, and over 60 firms are currently researching and developing one or more radiopharmaceuticals/radiotherapeutics from their own pipeline.

The conventional pharmaceutical industry gradually becomes interested in nuclear medicine with several M&A activities occurring in the past two years.

## Cyclotrons

MEDraysintell will publish the first edition of the Cyclotrons report and directory, which will provide a complete review of the cyclotrons market worldwide, with a comprehensive profile of 14 companies currently developing and/or supplying cyclotrons, and a summary of the firms that were active in this market in the past but they do no longer offer cyclotrons for sales.

The report is in progress and expected to be available later in the year.

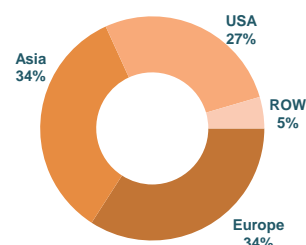
## Congresses

MEDraysintell will display its series of market reports and directories on Nuclear Medicine, Proton Therapy and Brachytherapy, during the EANM –European Association of Nuclear Medicine– congress (Hamburg, Germany, October 11-13, 2015). <http://eanm15.eanm.org/>  
Visitors are welcome in the Rad4Med.be pavilion booth #177/183/184.

## Proton Therapy

The proton therapy market has been very active worldwide since January 2015, with already 44 treatment rooms ordered to the different vendors for a value of over US\$ 750 million, including the first order in Latin America. 2015 is a record year with almost twice as much rooms ordered compared to 2014.

### 44 Treatment rooms



The proton therapy global market is expected to reach US\$ 1 billion in 2019, growing by almost 13% annually since 2013.

## Brachytherapy

The global market for brachytherapy is expected to reach almost US\$ 800 million in 2015 with HDR and Microspheres taking the largest part, electronic brachytherapy is gaining significant interest worldwide as a user-friendly technology, while LDR brachytherapy seeds market is mainly expected to grow in substantial new markets such as China and India because of its low cost compared to pharmacological alternatives and its association with a high therapeutic success rate. Brachytherapy represents an effective treatment option for many types of cancer, yet brachytherapy might be identified as the unexploited therapy. However new developments will also target different organs and tissues to be treated, in addition to developments in electronic brachytherapy and microspheres which are expected to bring new therapeutic potential and contribute to the further growth of this economic therapy modality.



Strategic intelligence for the radiation healthcare  
Bringing value to Businesses and Investors!

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