



PROTON THERAPY

WORLD MARKET REPORT

EDITION 2015

Proton Therapy

World Market Report – Edition 2015

THE MOST COMPREHENSIVE EVALUATION OF THE WORLD PROTON THERAPY INDUSTRY, WRITTEN BY EXPERTS

PROTON THERAPY WORLD MARKET IS EXPECTED TO REACH US\$ 1 BILLION IN 2019 WITH 330 PROTON THERAPY ROOMS, AND BETWEEN US\$ 3.5 TO 6.6 BILLION BY 2030, WITH 1,200 TO 1,800 PROTON THERAPY TREATMENT ROOMS AVAILABLE TO PATIENTS WORLDWIDE.

This 250-page report includes a complete market review and contains a detailed profile of 20 promoters, manufacturers or developers of proton and carbon therapy equipment.

For the first time the proton therapy world market is anticipated to reach US\$ 1 billion in 2019, with almost 330 proton therapy treatment rooms that will be available to patients. A jump from the 141 proton therapy treatment rooms operational in 2014 worldwide. However by 2019 only a tiny 1% of the population that requires some sort of radiotherapy will be able to get a proton therapy treatment.

The global particle therapy devices market (mainly proton therapy devices) reached the US\$ 100 million level for the first time in 2000 and saw an average annual growth rate from 2000 to 2014 of almost 15%. Growth has accelerated during the last four years, showing an average annual growth rate of 22% from 2010 to 2014. The proton therapy world market is projected to reach between US\$ 3.5 to 6.6 billion by 2030, with 1,200 to 1,800 particle therapy treatment rooms open to patients worldwide.

During 2014, about 14,500 patients were treated worldwide with particle therapy, with a total estimated cost of US\$ 400 million. By 2030, it is expected that 300,000 to over 600,000 patients will be treated with particle therapy.

Today there are 15 manufacturers or developers of proton and carbon therapy equipment, and by 2019 almost 70% of the PT market will be shared by 5 of these companies, including IBA and Varian.

Cost hurdles have certainly been an important factor in the slow adoption of proton therapy facilities in the recent past. Going forward, with the entry of Varian in 2007, the emergence of new vendors, the recent introduction of lower-cost/compact systems (a third of the new PT centers that opened their doors during the last two years were single-treatment-room centers), and, more importantly, a growing number of clinical evidence regarding its efficacy, particle therapy will progressively be used to treat a broader number of indications. Therefore, there is now a clear positive stance on the future of the proton therapy market, and it is becoming a real part of the global radiotherapy world.

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The race now continues to develop even smaller and cheaper proton therapy systems. Almost all proton therapy vendors already have, or are developing, a compact PT system. In addition to proton therapy, there is also an increase interest toward carbon therapy with the emergence of several projects in a few regions of the world and the most recent partnership between IBA and Toshiba to promote Toshiba's carbon therapy solutions outside of Japan.

A large majority of the companies profiled in this report accepted, just prior to publication, to review, amend and complete the information collected about their activities. This has increased the overall quality and uniqueness of this Experts report.

This third edition of the renowned World Proton Therapy report features in a 250-page document a comprehensive review of the market dynamics on a world basis. It analyzes both past and future trends to the year 2030, and contains a detailed profile of 20 promoters, manufacturers or developers of proton and carbon therapy equipment.

The purpose of this third edition of the report “Proton Therapy World Market Report” is to provide a comprehensive review of the worldwide particle therapy landscape, through a detailed analysis of the worldwide penetration of this therapy and of companies active in the market.

The report includes a detailed review of the existing market and an analysis of the trends up to the year 2030. In particular, this report provides an insight into the global proton and carbon therapy market, including:

- Market size and shares;
- Future trends and potential to 2030;
- Maps and list of all operational PT facilities;
- Maps and list of future PT centers up to 2019;
- Investments in and profitability of PT centers, including two real cases studies;
- Profile of 15 PT vendors and 5 companies promoting PT;
- Current and future clinical applications of proton therapy.

Tables of Contents

PT World Market Report – Edition 2015

A detailed table of contents of this report is available upon request.

Chapters / Sections

Executive Summary (pages 16-20)

History of Particle Therapy (pages 21-22)

Proton Therapy Market (pages 23-104)

- Health economics
- Cancer key facts
- Radiotherapy equipment worldwide
- Market size and shares
 - Current market
 - Overview
 - Operational particles therapy sites
 - Operational PT Sites Vendors
 - Global Market in 2014 & 2015
 - The Proton Therapy Index
 - Market by 2019
 - Overview
 - The world market in 2019 – Vendors
 - PT Market in USA – 2019
 - PT Market in Europe – 2019
 - PT Market in Asia – 2019
 - PT Market in Japan – 2019
 - PT Market in BRICSI – 2019
 - PT Market in Rest of the World – 2019
 - Global Perspective 2030
 - Overview
 - Forecast model
 - The Global perspective debate
 - PT Market by 2030 – 3 scenarios
 - Base case scenario
 - Scenario II
 - Scenario III
 - Potential growth bottleneck
 - The S-Curve of proton therapy
 - Market Matrix

Patients Statistics (pages 105-116)

- Evolution of patients treated with PT
- Number of patients treated per room
- Patients treated by vendor
- Patients treated to 2030
- Global cost of PT treatment

Tables of Contents

PT World Market Report – Edition 2015

Chapters / Sections

Economics of PT (pages 117-129)

- General
- Proton therapy investment
- Proton therapy revenue potential
- Proton therapy typical profitability
- Real cases studies
 - Case 1 – Multi-rooms facility
 - Case 2 – Single-room facility

Reimbursement (pages 130-134)

- General
- The US Case
- The Case of France

Clinical Applications (pages 135-158)

- Overview
- Technical basis
- Rationale for the use of Proton Beam Therapy
- Technology limitations
- Relevance of published clinical data
- Oncological indications
 - Intracranial and skull base tumors
 - Thorax area cancers
 - Gastrointestinal (GI) cancers
 - Pelvic cancer
 - Lymphomas
 - Pediatric tumors
- Non-oncological indications
- Future applications
- Coverage and recognition of the modality by the health authorities
- Currently running trials
- Conclusion

Promoters of PT (pages 159-164)

- General
- Profile of 5 companies active in the promotion and development of proton therapy. These companies are not manufacturers of equipment.

Tables of Contents

PT World Market Report – Edition 2015

Chapters / Sections

Equipment Suppliers (pages 165-217)

- General
- Equipment provided
- Revenues 2010 – 2016
- A comprehensive profile of 15 manufacturers or developers of proton and carbon therapy equipment.
 - Each profile contains a company description and key executives; the list of operational facilities and the ones to open by 2019; financial data, including revenues in PT; a description of the PT system(s) marketed and/or under development.

Appendix (pages 218-248)

- Appendix A – Operational PT facilities
- Appendix B – PT facilities under construction or projects
- Appendix C – PT facilities sorted by vendor
- Appendix D – PT facilities and their websites 240

Tables and Figures

- The report includes 83 tables and 82 figures
-

Contacts

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About MEDraysintell

Medical Radiation Strategic Intelligence Experts
Bringing value to Businesses and Investors!

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.

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