



Press Release

Louvain-la-Neuve, Belgium and Lalaye, France – May 5, 2015

PROTON THERAPY WORLD MARKET EXPECTED TO REACH US\$ 1 BILLION IN 2019

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.

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.

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.

MEDraysintell is very proud that 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.

More information and table of contents is available at: <http://medraysintell.com/Protontherapy.html>



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 nuclear medicine, proton therapy and radiotherapy. We aim to form an international team of experts in the field of Medical Radiation to provide Strategic Intelligence in nuclear medicine, radiotherapy, proton therapy and brachytherapy to help our clients better understand the markets – the competitive environment as well as the potential of mergers and acquisitions (M&A) – and technology development. MEDraysintell wants to support in their decision process, manufacturers of radiopharmaceuticals or therapeutic radioisotopes, suppliers of equipment and software as well as investors interested by this industry. www.medraysintell.com

For general enquiries, please email contact@medraysintell.com

Contact

Paul-Emmanuel Goethals, MBA
Louvain-la-Neuve, Belgium
e-Mail: peg@medraysintell.com
Mobile: +32 491 080 968

Richard Zimmermann, PhD
Lalaye, France
e-Mail: rz@medraysintell.com
Mobile: +33 6 82 80 06 00