



Press Release

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MEDDRAYSINTELL DOWNGRADES ITS PROTON THERAPY MARKET PROJECTION

In light of several factors summarized below, MEDDraysintell is downgrading its proton therapy market projection from 1,200 proton therapy treatment rooms that were expected to be operational in 2030 to 900. This still represents a 12% annual growth from 2017 to 2030 and the need to open an average of more than 50 PT treatment rooms every year from 2018 to 2030.

Originally MEDDraysintell expected 2015 to become the starting point of a dynamic increase of the PT market following the large number of new orders reported worldwide during that year. This trend continued in early 2016 but slowed down from mid-2016 on with a persistent decline during 2017. The drop of new orders reached almost 70% compared to 2015. For the first eleven months of 2017 PT orders remained below the average number of orders recorded annually between 2006 and 2017. The highest level of orders was observed in 2015 with almost 50 treatment rooms ordered accounting for nearly US\$ 1 billion. The lowest level was seen in 2008 with only five PT treatment rooms ordered. The trend in 2017 might improve somewhat if new PT orders are recorded before end of the year, however at this stage, it seems that 2015 appears to be an exceptional year and not the new norm expected by the industry.

Factors such as financial difficulties shown at several proton therapy centers in the recent past, has also affected the climate of the industry and has probably pushed certain potential investors to reconsider their priorities. In addition, apparent difficulties for a number of operational PT centers worldwide to recruit annually a sufficient number of patients are possibly also affecting the decision for building new PT centers. Furthermore, the US healthcare reforms are impacting new orders for large healthcare equipment, and the Chinese newly adopted five year plan resulted in delays for new orders from potentials customers.

2016 and 2017 particle therapy market sizes have been revised downward compared to the ones shown in the previous Edition of this PT report, mainly due to delays in the opening of several facilities and cancelation of some projects. In 2016 only 0.6% of the population that needed access to external radiotherapy was treated with proton therapy. Even with 900 treatment rooms in 2030, this will allow only 6-7% of this population to be able to receive proton therapy treatment.

However, with the growing clinical evidence regarding the efficacy of particle therapy that will progressively be used to treat a broader number of indications there is room for a further acceleration of the market especially if the industry brings the cost of equipment down.

MEDDraysintell is delaying the release of the fifth edition of its Proton Therapy World Market Report and Directory to mid-January 2018, when all the latest information will be collected for the last month of 2017. The new edition will provide a comprehensive review of the world market dynamics, with an analysis of both past evolutions and future trends to the year 2030, including a detailed profile of all promoters, manufacturers or developers of proton and carbon therapy equipment.

Pre-order now your copy of this report by email to peg@medraysintell.com



About MEDraysintell

MEDraysintell is a team of international experts providing first-rate strategic intelligence in nuclear medicine, radiotherapy, proton therapy and brachytherapy.

We offer the most comprehensive set of reports and directories, with over 2,100 pages of unrivaled intelligence covering some of the most exciting healthcare technologies using radiation for diagnosis and treatment. We offer client-specific intelligence in the field of radiation healthcare, with the upmost knowledge leveraging our extended network of worldwide contacts. We are proud to support numerous companies globally, helping them better understand the markets, competitive environment as well as the potential of merger and acquisitions (M&A) and technology development. We have repeat satisfied clients operating in the field of medical radiation, investment banks and institutional investors, large international consulting firms and universities research laboratories.

MEDraysintell was created in 2013 by Paul-Emmanuel Goethals and Richard Zimmermann. It combines over 40 years of experience in radiation healthcare. www.medraysintell.com

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