



Press Release

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Proton therapy market headwinds: demand down, supply up, but increasing awareness

While the year 2015 showed a record level of proton therapy systems orders and was expected to be the beginning of a strong potential market, it appeared to be an exceptional year. Since then demand for new systems has been halved. This decline directly impacts the PT market size evolution (in value US\$), with a market slowdown of about 3% a year between 2018 and 2020.

As of February 2021, there were fewer than 280 particle therapy treatment rooms (mostly proton therapy) available to patients worldwide. This low number represents only 0.4 particle therapy treatment rooms per ten million people compared to roughly an equivalent 20 radiotherapy systems in the world.

The top three vendors shared 70% of particle therapy market in 2020. Several companies are expected to enter the market for the first time in the coming years with their own proton therapy systems. The global PT market will then count some 20 vendors. A premise to further consolidations? Time will tell, but the present market situation might motivate some vendors to merge their PT activities as well.

However, there are favorable headwinds with a growing number of peer reviewed publications and encouraging opinions from the medical community which should facilitate an increasing clinical use of proton therapy in the future. Projections show that at least 10% of the population requiring external radiotherapy treatment could benefit from proton therapy. This would translate in a need of some 2,800 particle therapy treatment rooms to be installed worldwide. Hence, there is room for a new acceleration of the market especially if the industry brings the cost of equipment down and if innovative marketing strategies are implemented to target the medical community.

These data are now extensively detailed in the new **Proton Therapy World Market Report & Directory, Edition 2021**, a 380-page document featuring a comprehensive review of the world market dynamics with an analysis of both past evolutions and future trends to the year 2030, plus a detailed profile of 36 companies active in this industry and a directory of all PT facilities that are expected to become operational by 2025.

Detailed table of contents and sample pages available upon request to Paul-Emmanuel Goethals at peg@medraysintell.com

About MEDraysintell

MEDraysintell is a team of international experts providing first-rate strategic intelligence in nuclear medicine, cyclotron, proton therapy and brachytherapy. We offer the most comprehensive set of reports and directories, with over 4,000 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 to better understand the markets, the competitive environment as well as the potential of merger and acquisitions (M&A) and technology development. We have repeated satisfied clients operating in the field of medical radiation, investment banks and institutional investors, large international consulting firms and university research laboratories.

MEDraysintell was created in 2013 by Paul-Emmanuel Goethals and Richard Zimmermann. The team's expertise combines a century of experience in radiation healthcare. www.medraysintell.com

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