

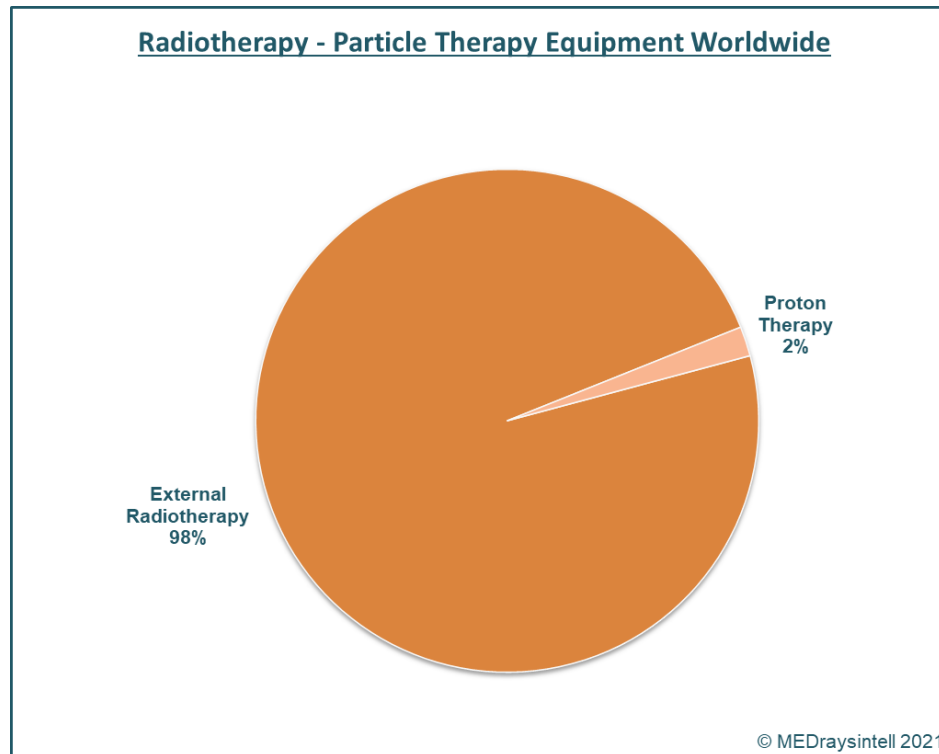
PROTON THERAPY 2021

WORLD MARKET REPORT & DIRECTORY

7th
Edition

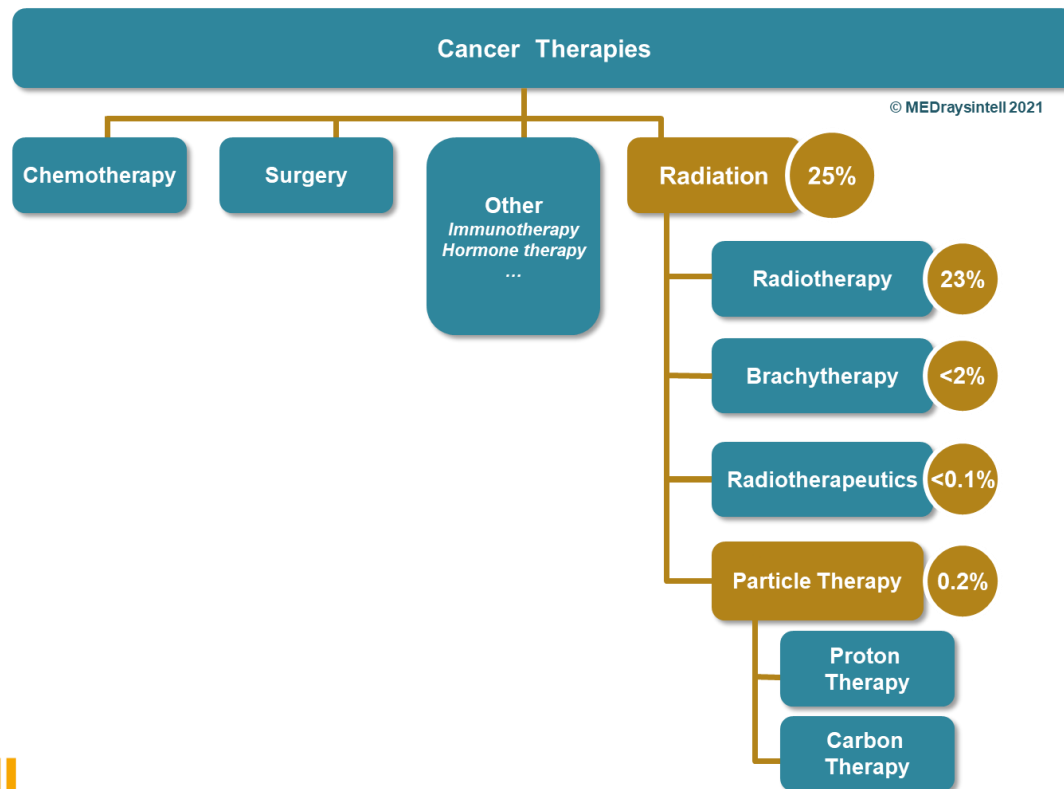
Proton Therapy, Edition 2021

- Proton Therapy remains a niche market, representing less than 2% of all the external radiotherapy systems installed worldwide.



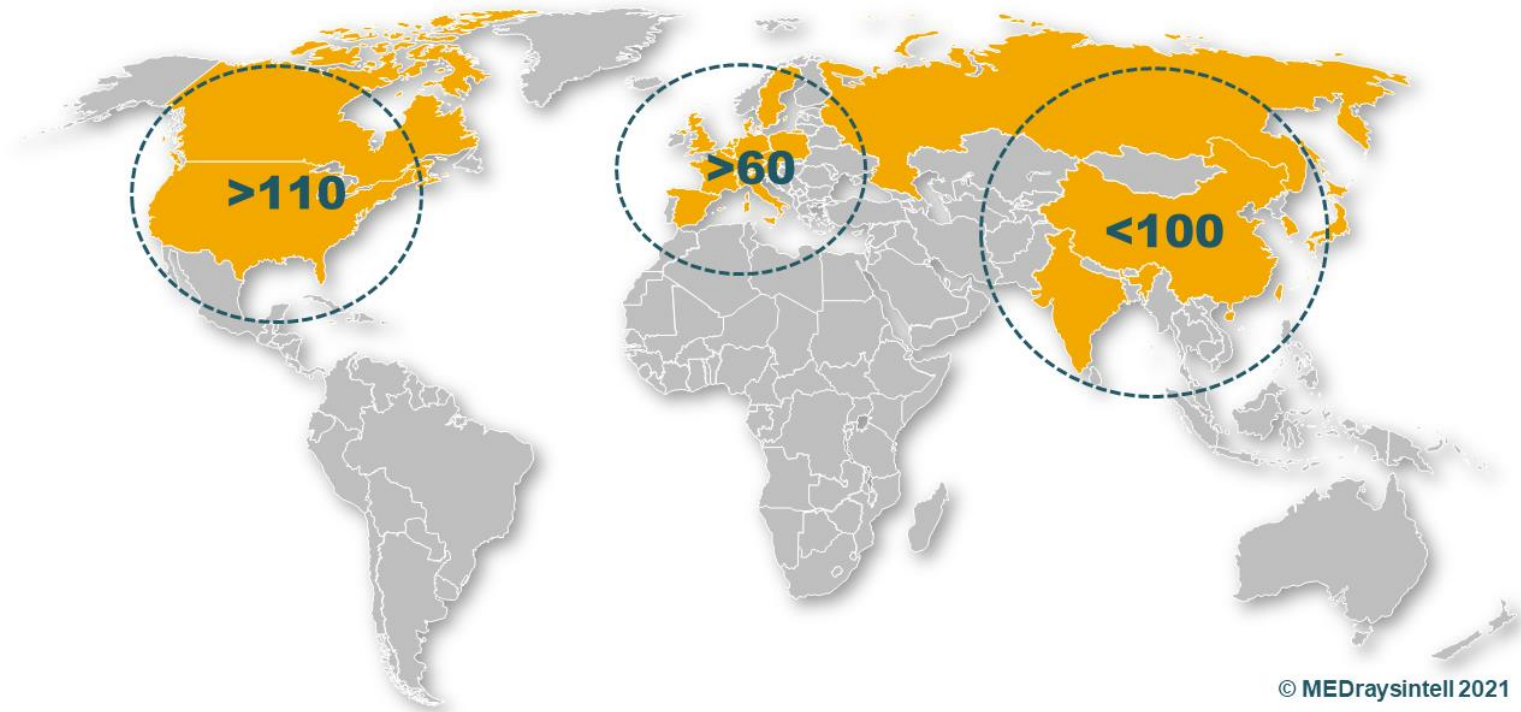
Proton Therapy, Edition 2021

- In 2020, among all patients that have been treated for their cancers worldwide, less than 0.2% were treated using particle therapy.



Proton Therapy, Edition 2021

- As of February 2021, there were fewer than 280 particle therapy (mostly proton therapy) treatment rooms available to patients worldwide.



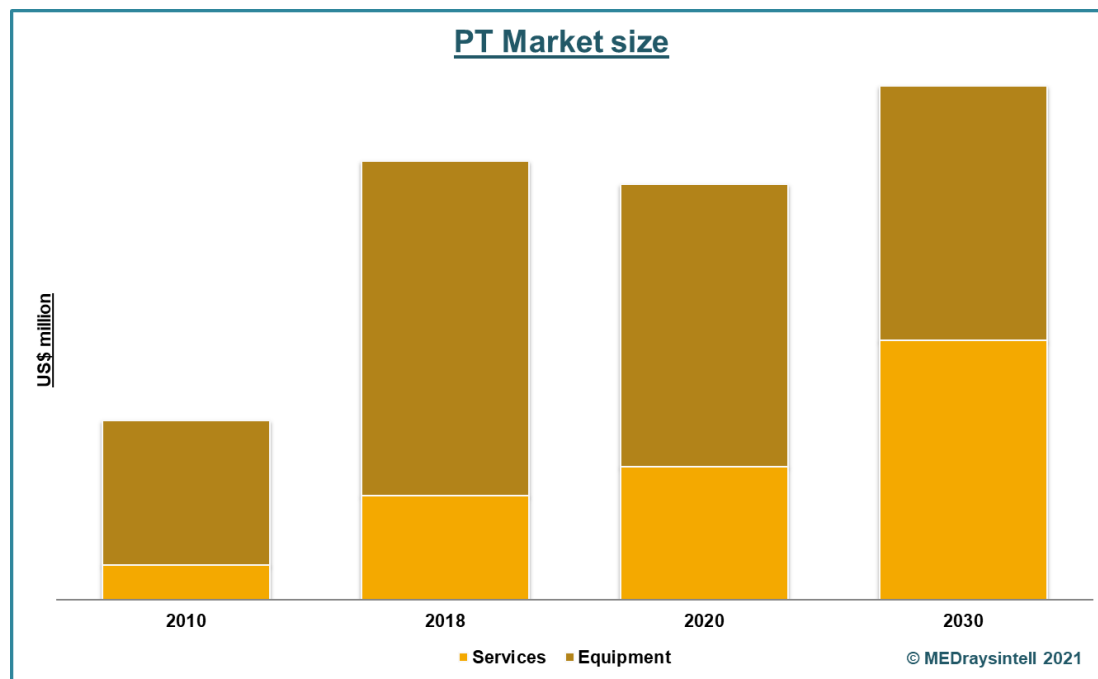
Proton Therapy, Edition 2021

- In 2020, there was 0.4 PT treatment room per ten million people worldwide, compared to almost 20 radiotherapy systems per ten million people.

	Particle Therapy Treatment Rooms for 10 million people	Radiotherapy systems for 10 million people
North America	3	120
Europe	1	60
Asia	0.2	10
WORLD	0.4	20

Proton Therapy, Edition 2021

- PT orders have fallen between 2015 and 2020, affecting the overall market size which declined by ~3% a year for the period 2018 to 2020. A trend that is expected to change with the opening of new centers.

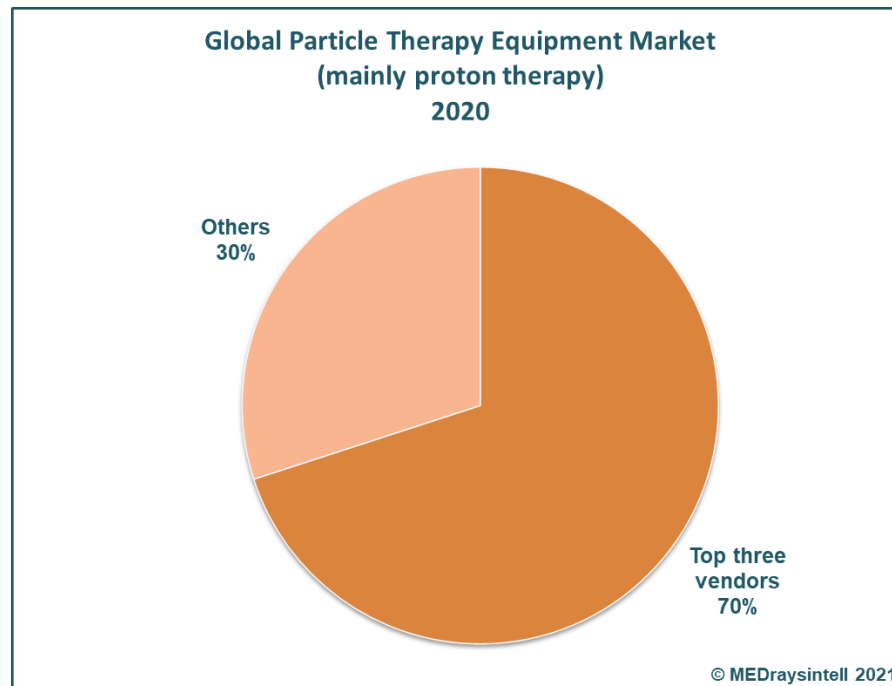


Proton Therapy, Edition 2021

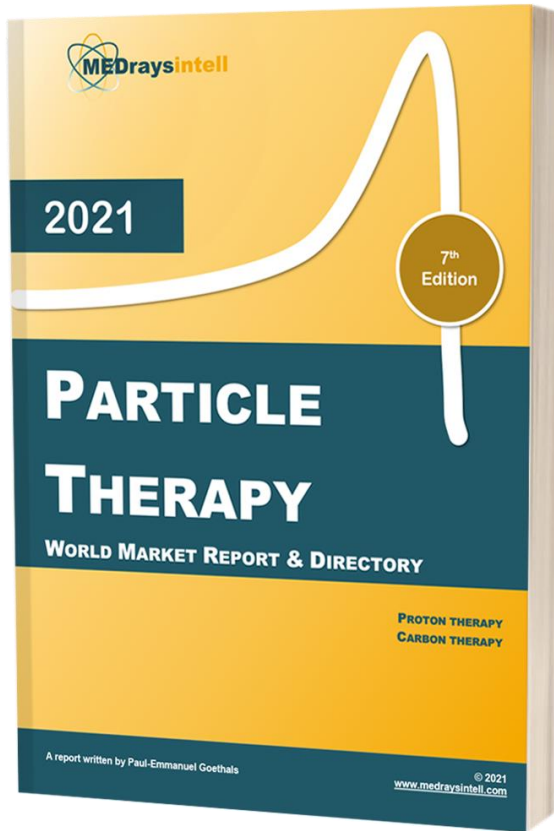
- In 2020, only 0.7% of the population that needed access to external radiotherapy was treated with proton therapy. Even with 550 treatment rooms likely to be available to patients worldwide in 2030, this will allow only ~2% of this population to be able to receive proton therapy treatment.
- As the medical-scientific community projects 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.

Proton Therapy, Edition 2021

- Three vendors are sharing 70% of the global proton therapy market in 2020. In the coming years some 20 vendors are likely to be active in the global PT market.



Proton Therapy



- Published in March 2021 (*7th Edition*)
 - A 380-page report which analyzes both past evolutions and future trends to the year 2030, with a detailed profile of 36 promoters, manufacturers or developers of proton and carbon therapy equipment and the list of all PT facilities that are or will be operational worldwide by 2025.

To obtain a detailed table of contents and sample pages, please send an e-mail with your contact details to Paul-Emmanuel Goethals at peg@medraysintell.com

About MEDraysintell

Experts with a combined century of experience in

- Nuclear Medicine
- Particle therapy
- Brachytherapy

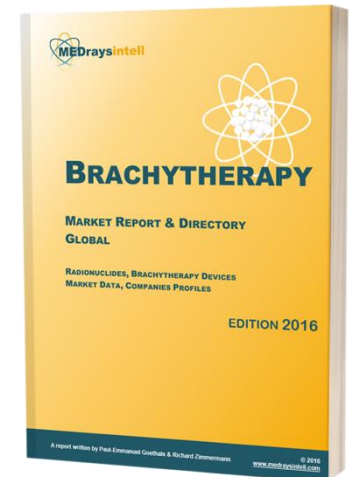
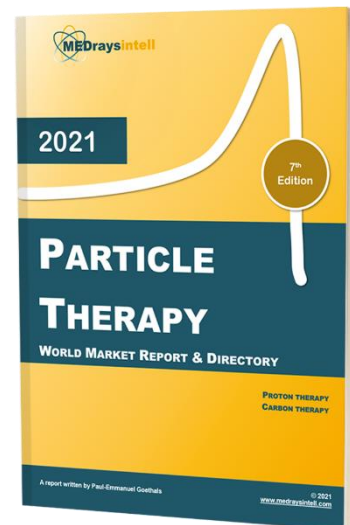
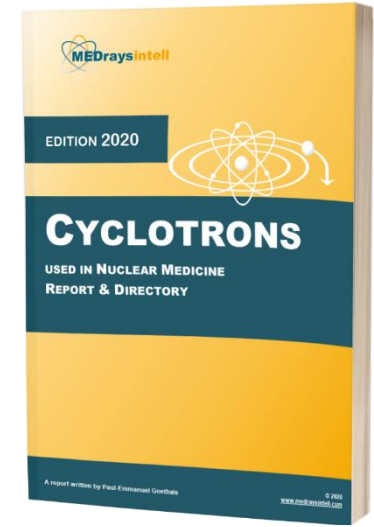
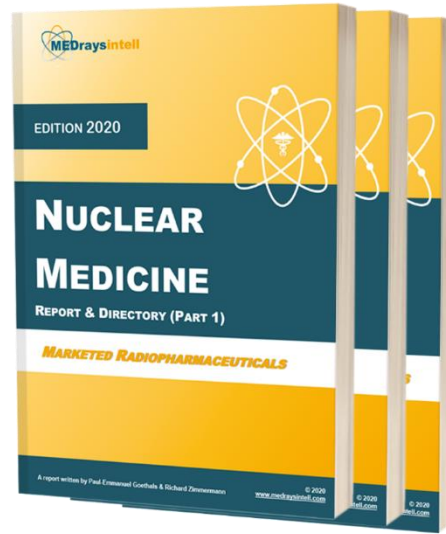
MEDraysintell provides strategic intelligence for the radiation healthcare to help clients understand

- Markets
- Competitive environment
- Potential for M&A
- Technology development

The most comprehensive set of reports & directories with over 4,000 pages of unrivaled intelligence, covering some of the most exciting healthcare technologies using radiation for diagnosis and treatment



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



Contact

- MEDraysintell reports and directories can be customized to specific areas or modalities
 - Sample pages and complete table of contents are available upon request
 - MEDraysintell also welcomes your requests for specific intelligence needs
-

Paul-Emmanuel Goethals, MBA

Louvain-la-Neuve, Belgium

peg@medraysintell.com

Phone: +32 491 080 968

www.medraysintell.com



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

Copyright © 2021, MEDraysintell (CSIntell and Chrysalium Consulting), All rights reserved.

© MEDraysintell 2021

Disclaimer

This MEDraysintell presentation and information contained herein, coming from the report “Proton Therapy World Market Report & Directory, Edition 2021” is believed to be accurate at the time of publication; it has been gathered in good faith from several public sources, but the authors are not in a position to guarantee its accuracy. The authors do not accept any responsibility for the content of this report/presentation. Information contained herein may be of a speculative nature and must be used with careful consideration. The authors assume no liability for any loss or damage – including but not limited to lost time, lost money, lost profits, lost customers – that may result from any use of the information or actions taken based on any analyses, projections, discussions, recommendations, or conclusions of any kind presented in this report/presentation.



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