

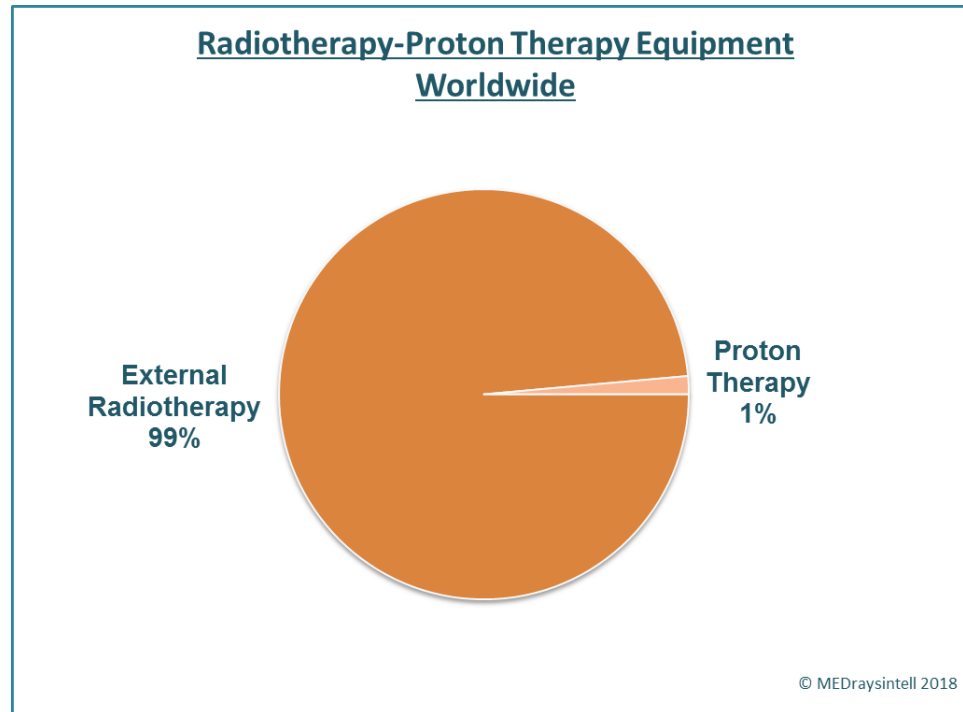
# PROTON THERAPY

**WORLD MARKET REPORT & DIRECTORY**

**EDITION 2018**

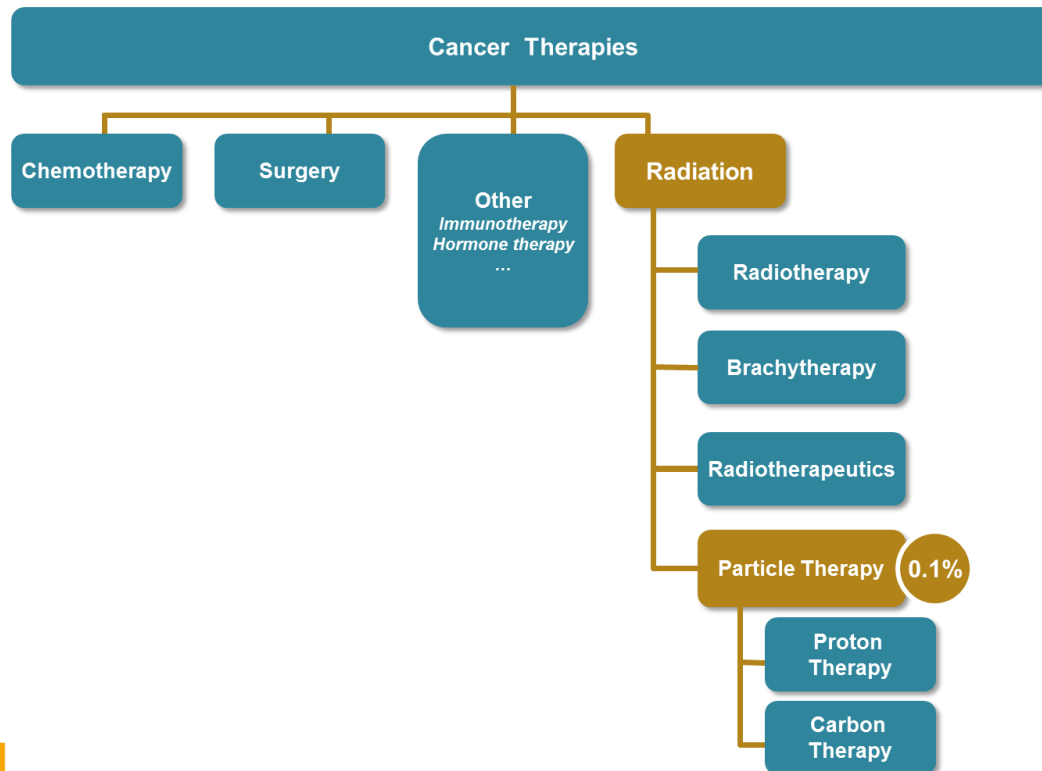
# Proton Therapy, Edition 2018

- Proton Therapy remains a niche market, representing just over 1% of all the external radiotherapy systems installed worldwide



# Proton Therapy, Edition 2018

- In 2017, among all patients that have been treated for their cancers worldwide, only just over 0.1% were treated using particle therapy



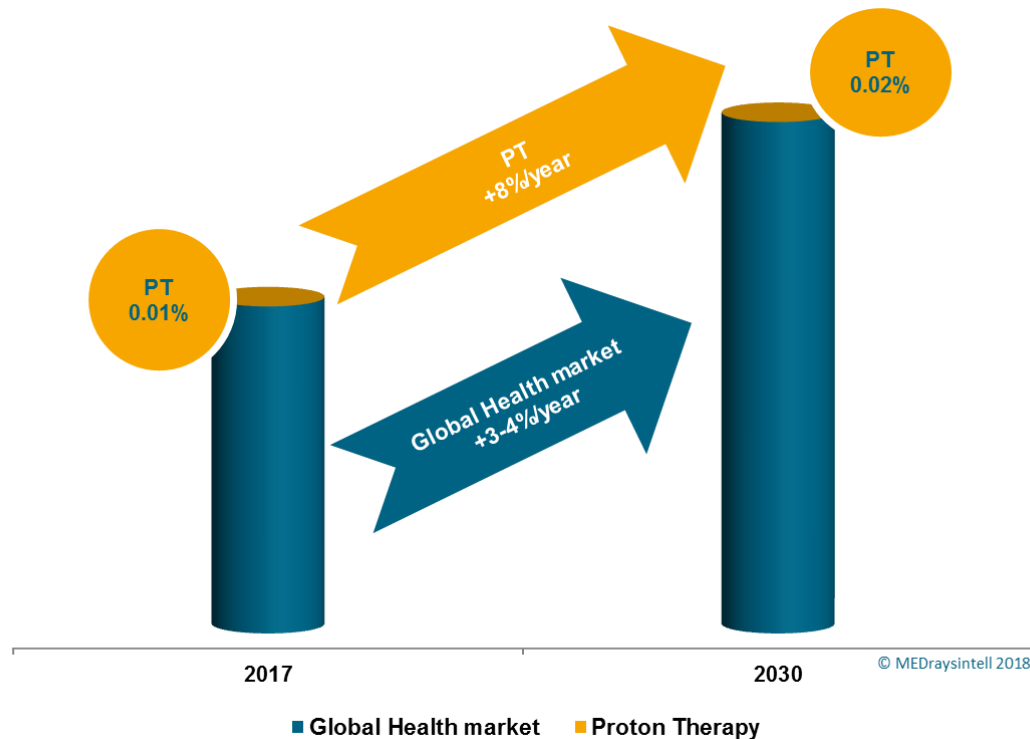
# Proton Therapy, Edition 2018

- By 2022, there will be 0.5 PT treatment rooms per ten million people worldwide, compared to some 20 radiotherapy systems per ten million people.

	Particle Therapy Treatment Rooms for 10 million people	Radiotherapy systems for 10 million people
North America	4	120
Europe	2	60
Asia	0.5	9
<b>WORLD</b>	<b>0.5</b>	<b>20</b>

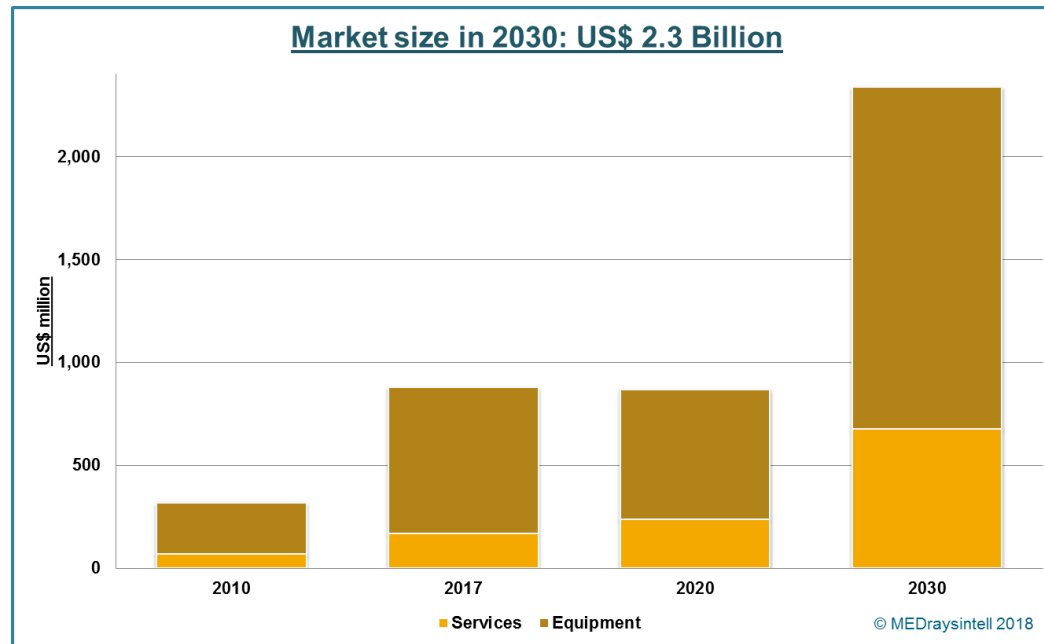
# Proton Therapy, Edition 2018

- The Proton Therapy market represents 0.01% of the global health expenditures but should grow twice as fast
  - Global Health market: US\$ 7,500 billion (2017), growth 3-4% a year
  - PT market: US\$ 0.9 billion (2017), growth 8% annually



# Proton Therapy, Edition 2018

- For the first time, the proton therapy world market is anticipated to reach over US\$ 1 billion in 2018, but with a projected market slowdown of 5-10% annually in 2019 and 2020 due to the low orders intake from mid-2016 and 2017



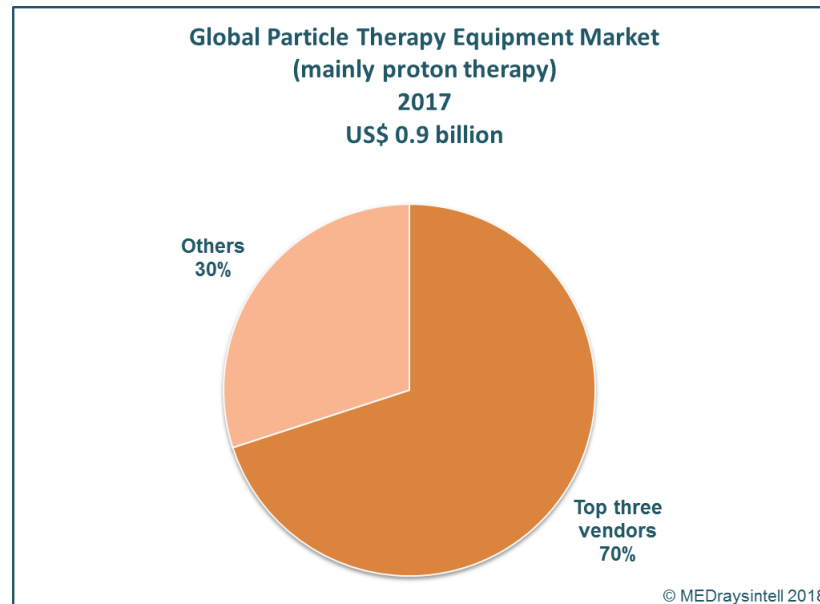
# Proton Therapy, Edition 2018

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- The global Proton Therapy market is estimated to reach between US\$ 2.3 to 4.3 billion by 2030, with 900 to 1,300 particle therapy treatment rooms open to patients worldwide.
- Even with 900 treatment rooms in 2030, this will allow only 6-7% of this population to be able to receive proton therapy treatment, meaning there is still a lot of improvement possible in this field.

# Proton Therapy, Edition 2018

- Three vendors share now 70% of the US\$ 0.9 billion global proton therapy market in 2017. In the coming years more than 10 vendors are likely to be active in the global PT market, estimated to reach US\$ 2.3 billion by 2030. A challenging trend that remains realistic especially if the industry brings novel equipment, lighter-less expensive





# Proton Therapy



- Published in January 2018 (*5<sup>th</sup> Edition*)
  - A 340-page report which analyzes both past evolutions and future trends to the year 2030, with a detailed profile of 27 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 2022.

A detailed table of contents and sample pages are available upon request, please send an e-mail with your contact details to: [peg@medraysintell.com](mailto:peg@medraysintell.com)

# About MEDraysintell

More than 40 years of experience in

- Nuclear Medicine
- Particle therapy
- Brachytherapy

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

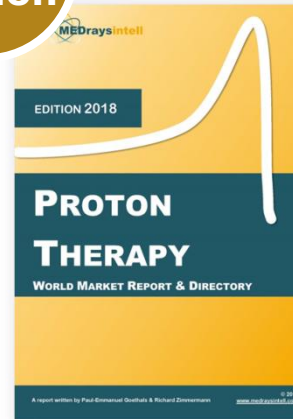
- Markets
- Competitive environment
- Potential for M&A
- Technology development

The most comprehensive set of reports & directories with over 2,100 pages of unrivaled intelligence, covering some of the most exciting healthcare technologies using radiation for diagnosis and treatment

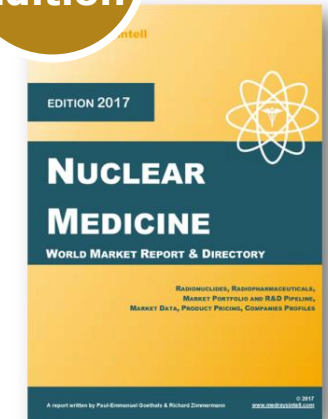


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Bringing value to Businesses and Investors!

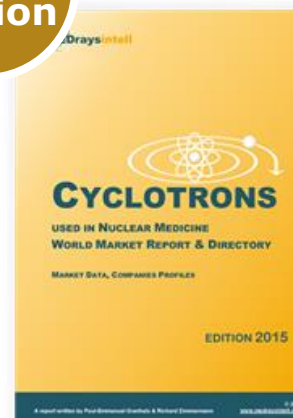
5th  
Edition



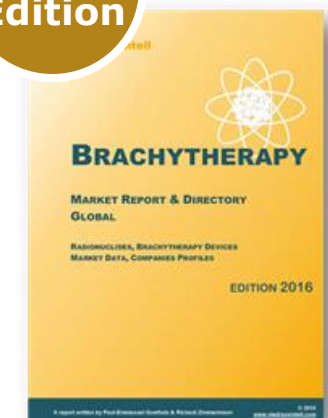
4th  
Edition



1st  
Edition



2nd  
Edition



# Contact

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- 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
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Bringing value to Businesses and Investors!

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