

PROTON THERAPY

WORLD MARKET REPORT.

EDITION 2013

A **MEDraysintell** report written by Paul-Emmanuel Goethals (CSIntell)
& Richard Zimmermann (Chrysalium Consulting)



Proton Therapy

World Market Report – Edition 2013

PROTON THERAPY WORLD MARKET TO NEARLY TRIPLE BY 2018 TO REACH US\$ 2.5 BILLION IN 2030 ANNUAL GROWTH OF 10%

The proton therapy world market is anticipated to nearly triple by 2018, with about 300 proton therapy rooms treating patient on a regular basis compared to 110 treatment rooms in 2012. As of August 2013 there were 43 operational particle therapy facilities worldwide, representing 121 treatment rooms. This represents merely 0.9% of all conventional radiotherapy systems used around the world.

From 1990 to August 2013, the number of particle therapy treatment rooms in activity has grown from 8 to 121, representing an annual growth rate of almost 13%.

The success of smaller and cheaper proton therapy systems in the coming years, as well as a broader use of proton therapy for more cancer indications, provide a positive stance on the future of proton therapy market. Accordingly, in the report, MEDraysintell considers a base case scenario for the global proton therapy devices market, to grow by 10% annually to reach US\$ 2.5 billion in 2030 for a total of 1,000 proton therapy treatment rooms available for patients on a regular basis. In addition, MEDraysintell analyzes a more optimistic scenario with a projected annual growth of 14% to reach almost US\$ 5 billion in 2030 with 1,500 proton therapy treatment rooms.

IBA clearly dominated the world market for the past 20 years. However new vendors are coming and other vendors are increasing their market share. For the year 2018, it is estimated that IBA will hold 29% of the world particle therapy market, followed by Varian with 14% and Mitsubishi and Hitachi holding 8-9% market share each.

This second edition of the renowned World Proton Therapy report features a comprehensive review of the proton therapy market around the world, analyzing the existing market and potential for further growth. In addition, to update and review the data provided in the previous edition, we have refined our model, added information on the BRICS countries and we have augmented this edition with a fully new chapter on the Clinical Applications of proton therapy that focuses on the indications for which clinical advantages have already been demonstrated as well as future applications. The report analyzes both past and future trends to the year 2030.

Key benefits include: market size and shares; future trends and potential to 2030; detailed maps and list of all operational and future PT centers; economics of proton therapy (investment, revenues and profitability of a compact and a large proton therapy center), reimbursement policies; profile of PT vendors. The report focuses on proton therapy, however it also covers the few carbon therapy facilities existing or being installed worldwide.

Proton Therapy

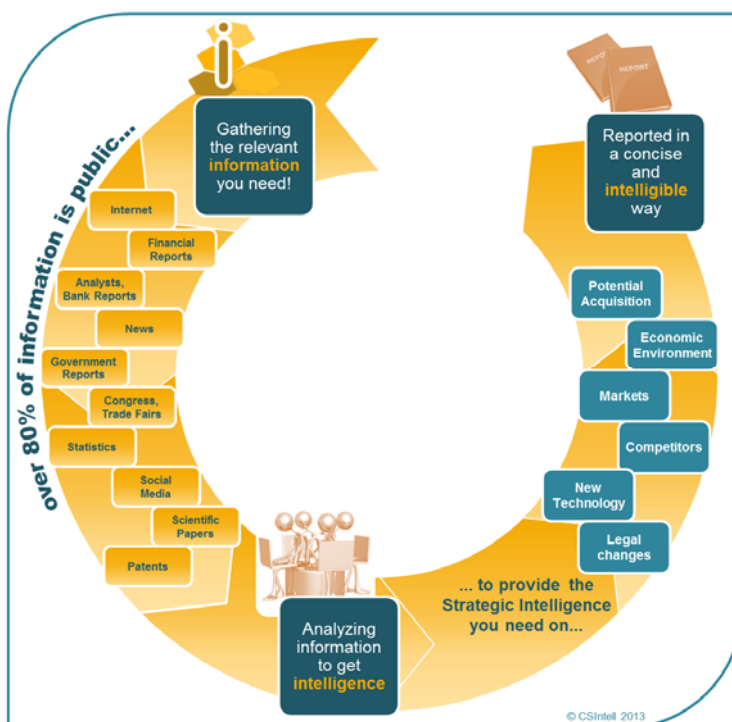
World Market Report – Edition 2013

The first edition of this report, published in October 2012, was well received by clients in Europe, USA, Asia, Russia and the Middle-East. Clients' feedback praised the outstanding level of this report.

The Proton Therapy World Market Report Edition 2013 may prove valuable for industry insiders, finance professionals (analysts, investors), media, as well as potential investors in new proton therapy centers.

This report, written by Paul-Emmanuel Goethals (CSIntell) and Richard Zimmermann (Chrysalium Consulting) through the MEDraysintell alliance, provides a detailed review of information coming from a number of different sources, based on CSIntell 3'i methodology.

By analyzing a wide range of information from public sources such as the Internet, financial reports, news, government reports and many others, the authors are able to provide a clear understanding of the proton therapy market of yesterday, today and its foreseeable future.



In addition several interviews have been conducted with industry executives, managers, bankers and some major cancer centers around the world. Finally, visits to the recent ESTRO – European Society for Radiotherapy & Oncology – meeting held in Geneva in April 2013 and at the PTCOG – Particle Therapy Co-Operative Group – meeting held in Essen, Germany in June 2013 also provided us with an occasion to speak to industry insiders and challenge our views as they are exposed within the report.

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About MEDraysintell

Strategic intelligence for the medical radiation industry

The **MEDraysintell** alliance, launched by Paul-Emmanuel Goethals (CSIntell) and Richard Zimmermann (Chrysalium Consulting) combines 40 years of experience in radiotherapy, particle therapy and nuclear medicine. The **MEDraysintell** alliance aims to provide companies active in the medical radiation industry worldwide with high added value strategic intelligence helping them to better understand the markets, competitive environment, and the potential of mergers and acquisitions (M&A) and technology development. www.csintell.com/MEDraysintell.html

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