



Press Release

Grez-Doiceau, Belgium, and Lalaye, France September 10, 2013

## **PROTON THERAPY WORLD MARKET TO NEARLY TRIPLE BY 2018**

MEDDraysintell (a CSIntell – Chrysalium Consulting alliance), the expert in strategic intelligence for the medical radiation industry, publishes its new Proton Therapy World Market Report Edition 2013.

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, MEDDraysintell 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, MEDDraysintell 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 market dynamics on a world basis. It analyzes both past and future trends to the year 2030. The report 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 including reimbursement policies; profile of PT vendors. In addition a chapter on clinical applications focuses on the indications for which clinical advantages have already been demonstrated as well as future applications. The report covers also carbon therapy. 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.

More information and table of contents is available at:

<http://www.csintell.com/attachments/File/MEDDraysintell - Proton Therapy Edition 2013-TOC.pdf>

### **About MEDDraysintell**

The MEDDraysintell 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 MEDDraysintell 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/MEDDraysintell.html](http://www.csintell.com/MEDDraysintell.html)

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