

**Strategic intelligence for  
the radiation healthcare**

*A series of expert market reports  
and directories*

**Nuclear Medicine**

**Cyclotrons**

**Proton Therapy**

**Brachytherapy**

# **RADIATION USED IN MEDICINE A LAND OF OPPORTUNITIES**

# Disclaimer

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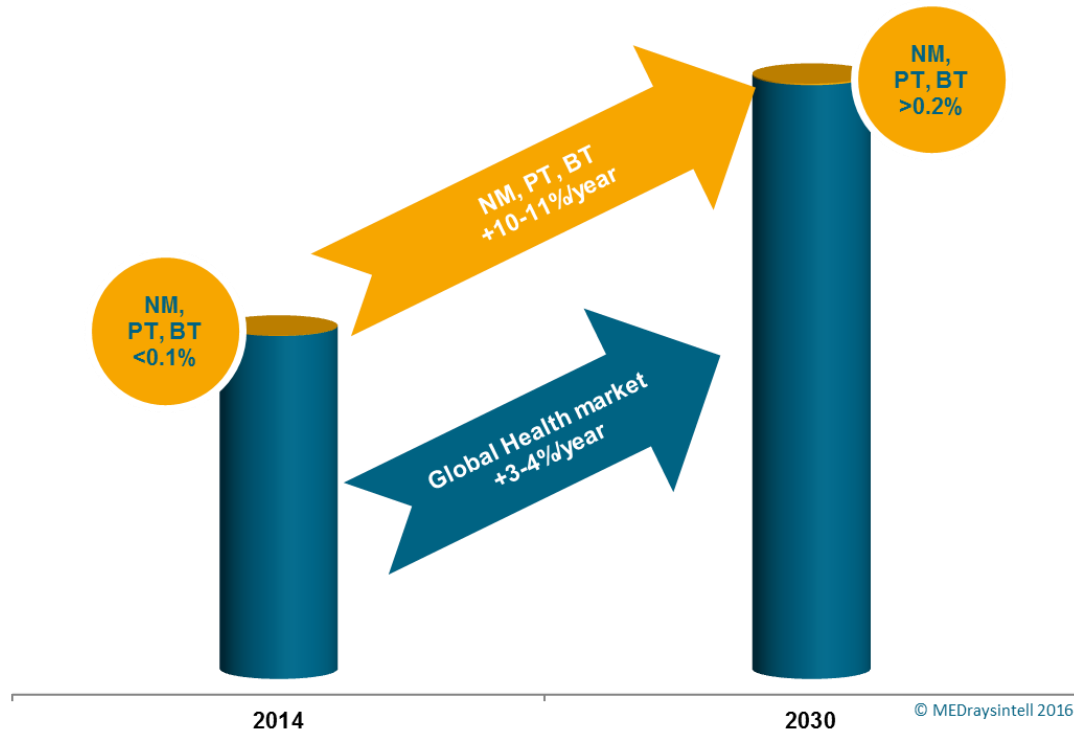
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*Bringing value to Businesses and Investors!*

# Global Health Economics

- Nuclear medicine, proton therapy and brachytherapy are niche markets which together represents less than 0.1% of the global health expenditures but should grow more than twice as fast
  - Global Health market: US\$ 7,400 billion (2014), growth 3-4% a year
  - NM, PT, BT markets: US\$ 5.8 billion (2014), growth 10-11% annually

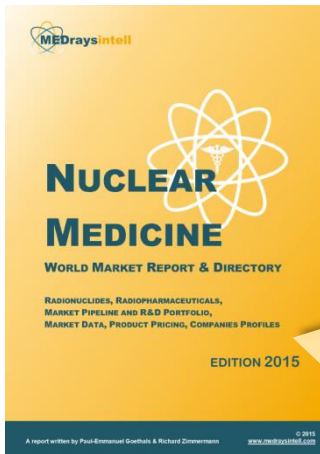


# Nuclear Medicine

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- The diagnostic radiopharmaceutical market is expected to grow by 6% a year, mainly driven by volume with limited impact from new tracers, while the therapeutic radiopharmaceutical market is expected to grow >20% annually from 2014 to 2030
- About 70 companies are currently active in the market, plus over 60 companies currently active in R&D
- The number of medical cyclotrons are expected to grow with the emergence of the Asian and South American markets and the need of tools for new proprietary tracers

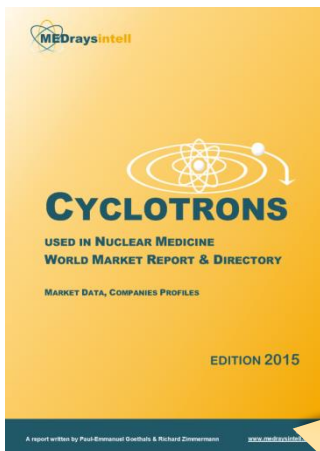
# Nuclear Medicine



- Published in June 2015 (*2<sup>nd</sup> Edition*)

- A 930-page document that provides a description and analysis of 335 radiopharmaceuticals and radionuclides and 160 companies and institutions

[Click for more info](#)



- Published in December 2015 (*1<sup>st</sup> Edition*)

- A 350-page report with an extensive review of all cyclotrons around the world, plus an exhaustive profile of the 14 companies active in this market and a detailed list of more than 1,200 medical cyclotrons worldwide

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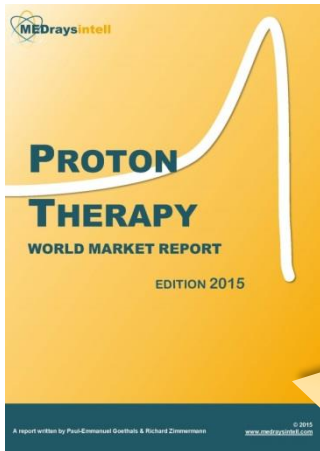
# Proton Therapy

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- The global proton therapy market saw record sales orders at just over US\$ 1 billion in 2015, more than twice as much as in 2014
- Over 170 particle therapy treatment rooms are currently operational worldwide. Between 1,200 to 1,800 treatment rooms should be available to patients worldwide by 2030
- Proton therapy systems currently available to patients represents about 1% of the radiotherapy facilities but should take a much larger share by 2030

# Proton Therapy

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- Published in May 2015 (*3<sup>rd</sup> Edition*)
  - A 250-page report that includes a complete market review and contains a detailed profile of all promoters, manufacturers or developers of proton and carbon therapy equipment

[Click for more info](#)

# Brachytherapy

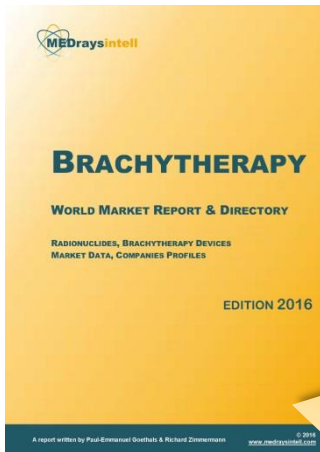
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- The global market for brachytherapy reached US\$ 680 million in 2013 and is expected to reach over US\$ 2.4 billion in 2030
- Growth to come from microspheres and electronic brachytherapy, with electronic brachytherapy to take some shares from the HDR brachytherapy market
- LDR brachytherapy seeds market mainly growing in emerging regions



# Brachytherapy

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- A 2<sup>nd</sup> edition to come mid-2016

- The first edition, published in November 2014, is a 320-page report with a comprehensive evaluation of the brachytherapy industry, providing detailed information about products as well as the 58 companies active in this market

[Click for more info](#)

# About MEDraysintell

More than 40 years of experience in

- Nuclear Medicine
- Particle therapy
- Brachytherapy

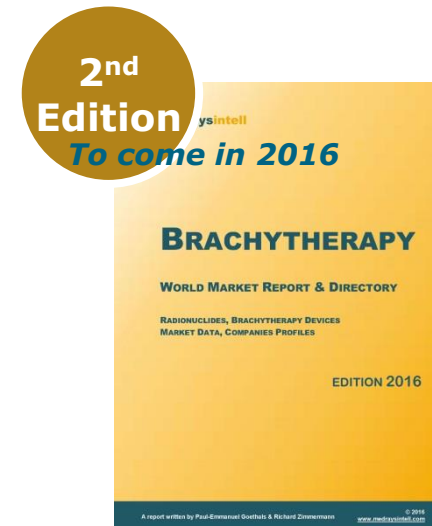
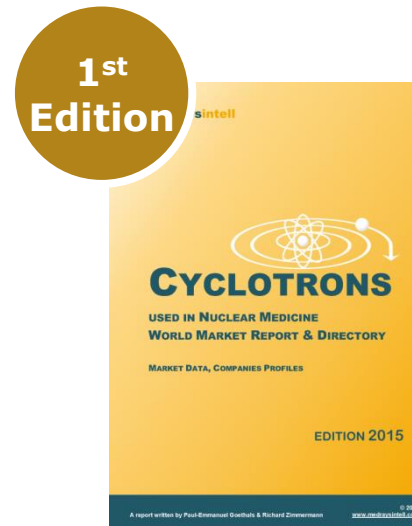
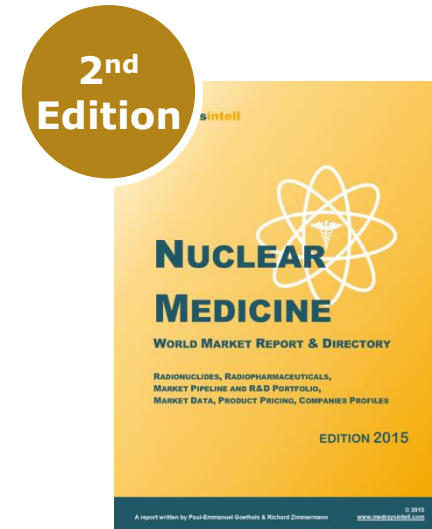
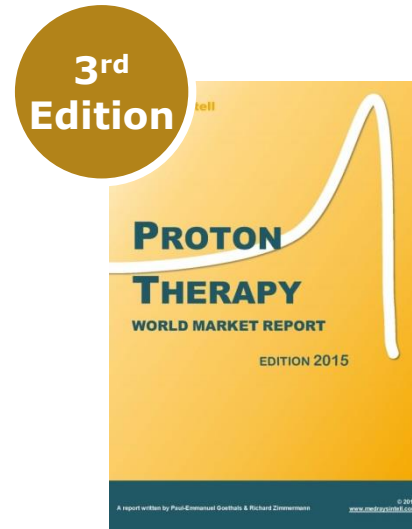
MEDraysintell provides strategic intelligence for the radiation healthcare to help clients understand

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

The most comprehensive set of reports & directories with over 1,800 pages of unrivaled intelligence, covering some of the most exciting healthcare technologies using radiation for diagnosis and treatment



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  - Sample pages and complete table of contents are available upon request
  - MEDraysintell also welcomes your requests for specific intelligence needs
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