

**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

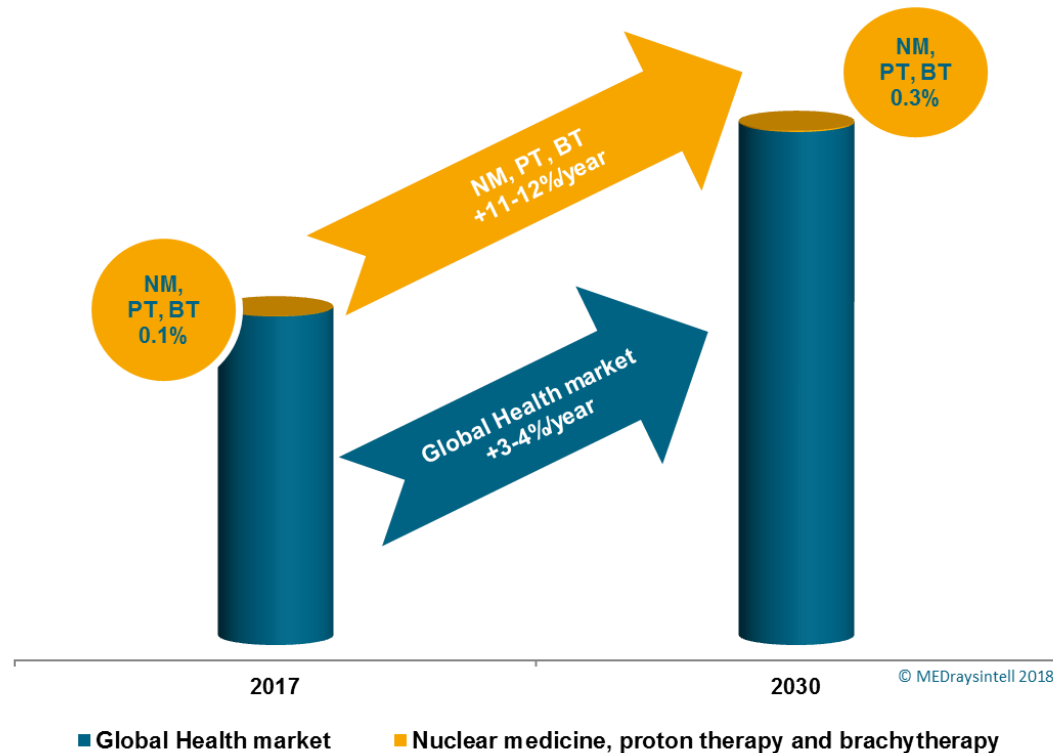
This MEDraysintell report/presentation and information contained herein, coming from several MEDraysintell's reports, is believed to be accurate at the time of publication; it has been gathered in good faith from several public sources, but the authors are not in a position to guarantee its accuracy. 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!

Global Health Economics

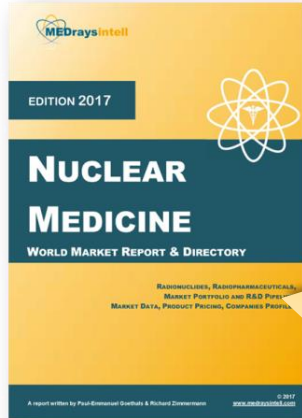
- Nuclear medicine, proton therapy and brachytherapy are niche markets which together represents 0.1% of the global health expenditures but should grow more than three times as fast
 - Global Health market: US\$ 7,500 billion (2017), growth 3-4% a year
 - NM, PT, BT markets: US\$ 6.7 billion (2017), growth 11-12% annually



Nuclear Medicine

- The diagnostic radiopharmaceutical market is expected to grow by 7% a year, mainly driven by volume with some impact from new tracers, while the therapeutic radiopharmaceutical market is expected to grow >20% annually from 2017 to 2030
- About 70 companies are currently active in the market, plus some 50 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

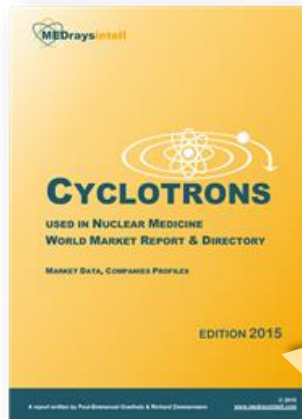
Nuclear Medicine



- Published in June 2017 (*4th Edition*)

- A 1,100-page document that provides a description and analysis of 390 radiopharmaceuticals and radionuclides and over 190 companies and institutions

[Click for more info](#)



- Published in December 2015 (*1st Edition*)

- A 350-page report with an extensive review of the 1,200 medical cyclotrons worldwide, plus an exhaustive profile of the 14 companies active in this market

[Click for more info](#)



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

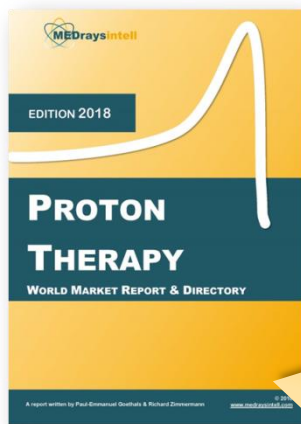
Proton Therapy

- Three vendors share 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
- 200 particle therapy treatment rooms are currently operational worldwide. Between 900 to 1,300 treatment rooms should be available to patients worldwide by 2030
- Proton therapy systems currently available to patients represents over 1% of the radiotherapy facilities in 2017

Proton Therapy

- Published in January 2018 (*5th 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.



[Click for more info](#)

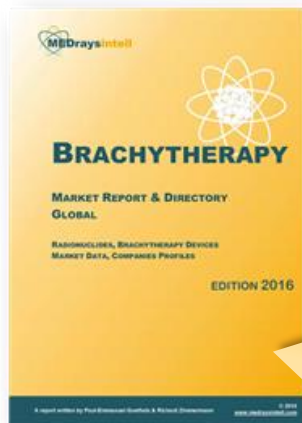
Brachytherapy

- The global market for brachytherapy reached US\$ 0.8 billion in 2017 and is expected to reach US\$ 2 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

- Published in March 2016 (*2nd Edition*)

- A 340-page document that provides a complete description of the radionuclides and devices used in brachytherapy, and a detailed profile of 62 companies and institutions active in this field around the world.



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

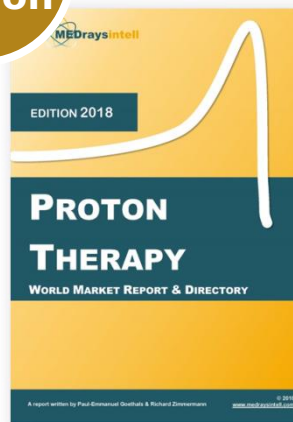
- Markets
- Competitive environment
- Potential for M&A
- Technology development

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

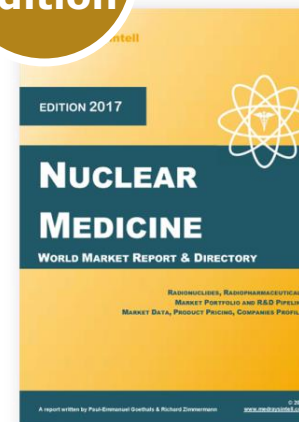


Strategic intelligence for the radiation healthcare
Bringing value to Businesses and Investors!

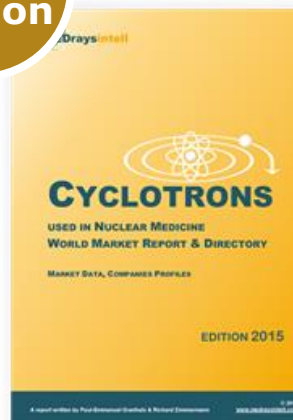
5th
Edition



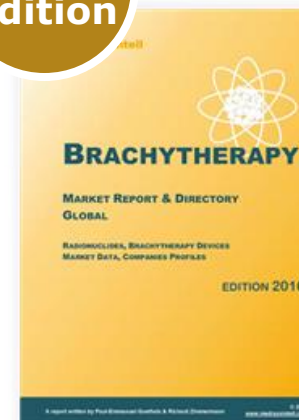
4th
Edition



1st
Edition



2nd
Edition



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

Dr. Richard Zimmermann, PhD
Lalaye, France
rz@medraysintell.com
Phone: +33 6 82 80 06 00



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

Copyright © 2018, MEDraysintell (CSIntell and Chrysalium Consulting), All rights reserved.

© MEDraysintell 2018