

Proton Therapy Systems Market Size and Forecast (2020 - 2030), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Setup Type (Single Room and Multi Room), Application (Brain and Central Nervous System Cancer, Head and Neck Cancer, Prostate Cancer, Breast Cancer, Lung Cancer, Gastrointestinal Cancer, and Others), and Geography (North America, Europe, Asia Pacific, South & Central America, and Middle East & Africa)

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Abstracts

The proton therapy systems market size is expected to grow from US\$ 1.26 billion in 2022 to US\$ 4.44 billion by 2030; it is anticipated to record a CAGR of 17.0% from 2022 to 2030.

Market Drivers of the Proton Therapy Systems Market

The high prevalence of cancer and demand for advanced treatments for cancers boost the demand for proton-based radiotherapy, fueling the proton therapy systems market growth. As per the International Agency for Research on Cancer (IARC), lung, breast, and prostate cancer types had the highest incidence rate in 2022. These diseases have an age-standardized rate of 23.6, 47.1, and 29.4 cases per 100,000 population, respectively. According to the estimates by IARC, the number of total cancer cases is expected to jump from 19.98 million in 2022 to 23.71 million by 2030 and 30.97 million by 2045. Various cancer conditions, such as head and neck cancers (nasal, oral, eye,

and larynx) and brain cancers have precise treatment requirements, which results in a high demand for advanced treatment approaches such as intensity-modulated proton therapy (IMPT). In traditional radiation therapies, such as X-ray radiation therapy, the healthy tissue around the tumor also receives a dose of radiation, which leads to side effects and may cause secondary cancers. However, proton therapy aids in the effective treatment of complicated tumors in the brain, and head and neck region while minimizing the collateral damage to nearby tissues. Thus, the high prevalence of cancer and demand for advanced treatments boost the demand for proton-based radiotherapy, fueling the proton therapy systems market growth.

Opportunities in the Proton Therapy Systems Market

Emerging countries such as India, China, Argentina, Brazil, UAE, and South Africa are expected to offer significant growth opportunities for proton therapy systems market players due to rising disposable incomes, expanding cancer patient population, increasing R&D activities, improving healthcare infrastructure, growing disease awareness, and relatively lenient guidelines compared to developed countries. This is an indication of strength in the proton therapy systems market. As cancer incidence rises in these countries, there is a greater demand for various proton therapy and other cancer treatment options. Furthermore, the governments of these countries are focusing on increasing access to effective and cutting-edge healthcare services for a larger proportion of their populations and improving reimbursement coverage. The expansion of healthcare products (including cancer treatment devices) across these nations is driven by the quick increase in per-capita healthcare spending and the growing public demand for affordable healthcare services. For instance, According to the World Economic Forum, as of 2022, Russia, Brazil, China, India, and South Africa collectively accounted for a third of global health spending. As per the World Bank, health spending in India and China increased by 3.01% and 5.35%, respectively, from 2018 to 2019. Thus, the increasing healthcare expenditure in emerging countries will likely provide opportunities for the proton therapy systems market growth during the forecast period.

Proton Therapy Systems Market: Segmental Overview

The market is bifurcated by setup type into single room and multi room. The multi room segment held the largest market share in 2022 and single room segment is anticipated to register the highest CAGR during the forecast period. The proton therapy systems market, by application, is categorized into brain and central nervous system cancer, head and neck cancer, prostate cancer, breast cancer, lung cancer, gastrointestinal cancer, and others. The brain and central nervous system cancer segment held the

largest proton therapy systems market share in 2022 and it is anticipated to register the highest CAGR during the forecast period.

Proton Therapy Systems Market: Geographical Overview

Asia Pacific is estimated to register the highest CAGR during 2022–2030. Countries in the Asia Pacific, such as India and China, hold significant potential for the growth of the proton therapy systems market. In 2022, North America accounted for the largest market share. The growing acceptance and adoption of the latest medical devices, the high prevalence of cancer, and product innovations by key players contribute to the expansion of the proton therapy systems market size in North America. According to the American Cancer Society estimates, the US recorded ~1.95 million new cancer cases and ~0.61 million mortalities related to the disease in 2023, exhibiting a significant increase from 1.60 million cancer cases and 0.60 million deaths reported in 2020. As per the Particle Therapy Co-Operative Group, at the end of 2023, the US had the highest number of proton therapy systems globally, with 46 proton therapy treatment facilities. Thus, the high prevalence of cancer and the high number of installed proton therapy systems favor the proton therapy systems market progress.

A few of the major primary and secondary sources referred to while preparing the report on the proton therapy systems market are the World Bank Data, National Health Service (NHS), FDA (Food and Drug Administration), EMA (European Medicines Agency), and WHO (World Health Organization).

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