NUCLEAR MEDICINE

WORLD MARKET REPORT & DIRECTORY

RADIONUCLIDES, RADIOPHARMACEUTICALS, MARKET PIPELINE AND R&D PORTFOLIO, MARKET DATA, PRODUCT PRICING, COMPANIES PROFILES

EDITION 2016
Nuclear Medicine, Edition 2016

This 990-page report has become the sole trusted source of intelligence in this industry and includes:
- 370 radiopharmaceuticals and radionuclides
- 170 companies and institutions active in Nuclear Medicine

Nuclear medicine remains a niche market representing less than 1% of the global pharmaceutical industry, but new opportunities lie ahead, especially in radiotherapeutics:
- Five new radiotherapeutics with a blockbuster potential (annual sales potential ≥US$ 1 billion) to reach the market before 2025
- Opportunities exist for larger groups or investors to finance such development, to merge with key partners and/or to acquire companies.
The global market is expected to reach US$ 25 billion by 2030, showing an annual average growth of 13%

- The diagnostic radiopharmaceutical (radiodiagnostics) market is expected to grow, on average, by 7% a year, mainly driven by volume with some impact from new tracers.

- The therapeutic radiopharmaceutical (radiotherapeutics) market is expected to grow 27% annually from 2015 to 2030.
72 companies are active in the global nuclear medicine market (with revenue shown in 2015), selling radiodiagnostics and/or radiotherapeutics, with three dominant players.
Almost 100 radiopharmaceuticals are currently marketed around the World, but some are only available locally.

The top 15 radiopharmaceuticals account for over 20% of the world market.

$^{99m}$Tc based radiopharmaceuticals account for over 50% of the world market.

Innovative solutions and additional sources will also emerge to cover the need for $^{99}$Mo.

The year 2016 is also the turning point for the introduction of new proprietary fluorinated molecules and novel radiodiagnostics based on $^{68}$Ga.
Over 60 companies are currently researching and developing one or more radiopharmaceuticals / radiotherapeutics from their own pipeline.

Out of these companies doing R&D, over 35 have not yet marketed a radiopharmaceutical product.
There is an increasing interest from the conventional pharmaceutical industry, with some recent M&A activities

- Bayer acquired Algeta
- Sun Pharmaceutical Industries acquired Pharmalucence
- Otsuka Pharmaceuticals entered into a global licensing and collaboration agreement with NuView Life Sciences
- Norgine entered into a partnership with Navidea
- Ipsen acquired OctreoPharm Sciences and partnered with 3B Pharmaceuticals.

The market saw some major recent consolidations

- AAA acquiring Atreus and IDB Group
- IHS acquiring IBA Molecular North America and is now part of Zevacor

Most recent news

- IBAM will acquire Mallinckrodt Nuclear Imaging business.
Contact

A detailed table of contents and sample pages are available upon request, please send an e-mail with your contact details to: peg@medraysintell.com

Price: EUR 7,000

MEDraysintell is a team of international experts providing first-rate strategic intelligence in nuclear medicine, radiotherapy, proton therapy and brachytherapy.

We offer the most comprehensive set of reports and directories, with over 1,900 pages of unrivaled intelligence covering some of the most exciting healthcare technologies using radiation for diagnosis and treatment.

We offer client-specific intelligence in the field of radiation healthcare, with the upmost knowledge leveraging our extended network of worldwide contacts.

We are proud to support numerous companies globally, helping them to better understand the markets, the competitive environment as well as the potential of merger and acquisitions (M&A) and technology development. We have repeat satisfied clients operating in the field of medical radiation, investment banks and institutional investors, large international consulting firms and universities research laboratories.

MEDraysintell was created in 2013 by Paul-Emmanuel Goethals and Richard Zimmermann. It combines over 40 years of experience in radiation healthcare.

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