

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

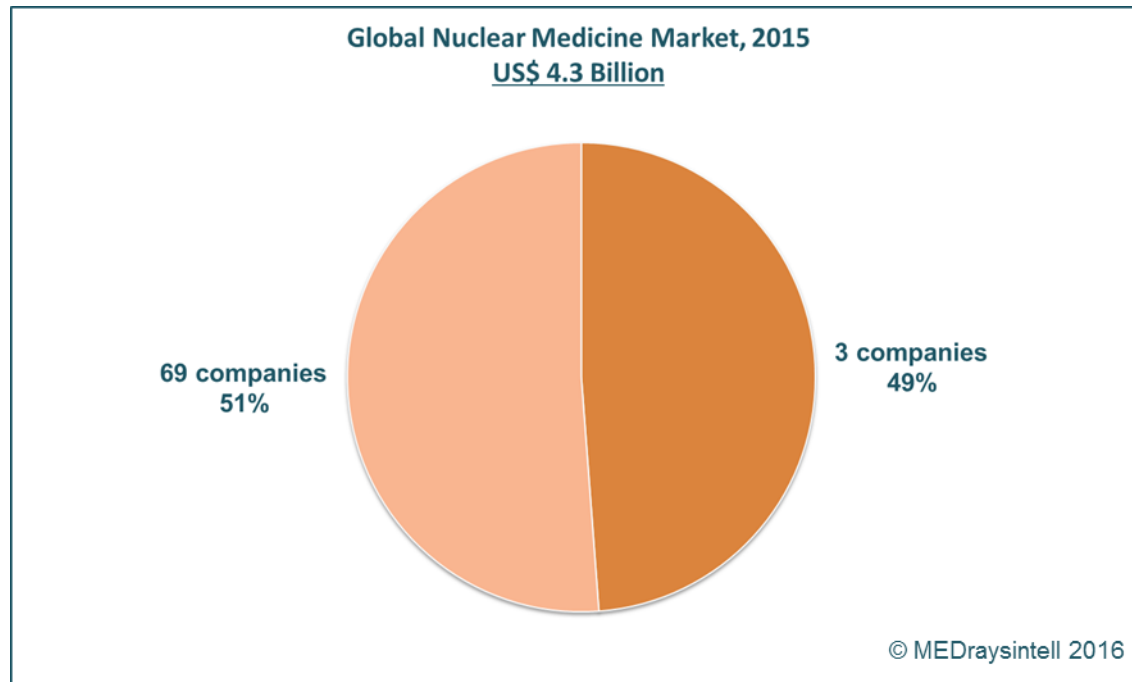
- Nuclear medicine remains a niche market representing less than 1% of the global pharmaceutical industry, but new opportunities lie ahead, especially in radiotherapeutics
 - Five new radiotherapeutics with a blockbuster potential (annual sales potential \geq US\$ 1 billion) to reach the market before 2025
 - Opportunities exist for larger groups or investors to finance such development, to merge with key partners and/or to acquire companies.

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- 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.

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- 72 companies are active in the global nuclear medicine market (with revenue shown in 2015), selling radiodiagnostics and/or radiotherapeutics, with three dominant players.



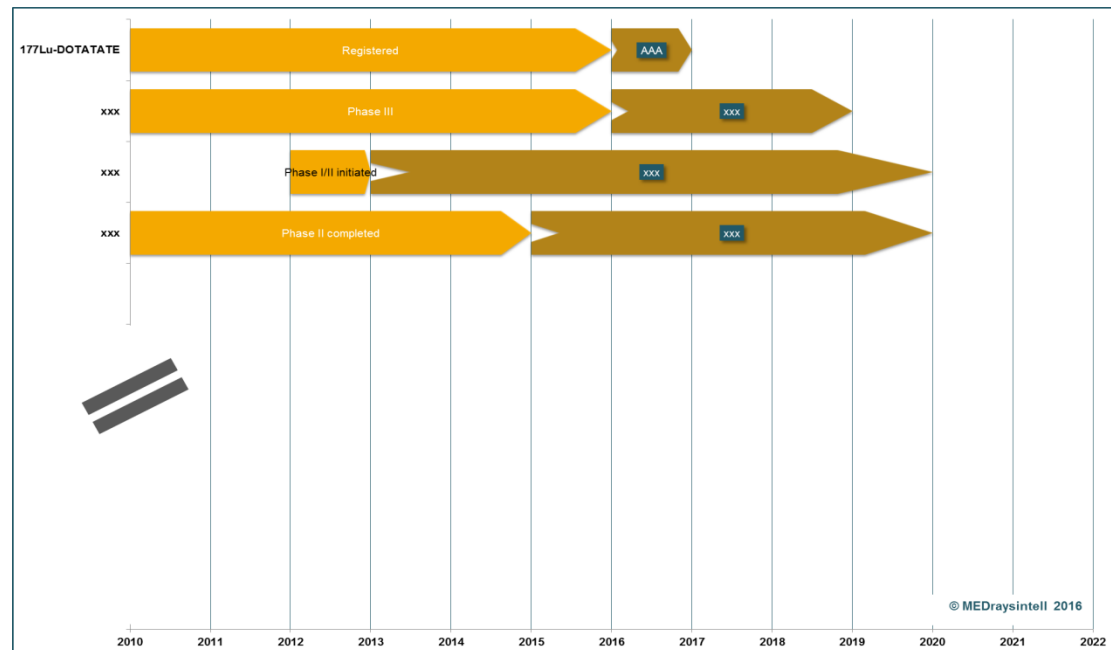
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- Almost 100 radiopharmaceuticals are currently marketed around the World, but some are only available locally
- The top 15 radiopharmaceuticals account for over 20% of the world market
- ^{99m}Tc based radiopharmaceuticals account for over 50% of 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 .

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- 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.

Radiotherapeutics under development



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- 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

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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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