



Press Release

Louvain-la-Neuve, Belgium and Lalaye, France – June 25, 2015

DEVELOPMENTS IN NUCLEAR MEDICINE ANALYZED IN A NEW EXHAUSTIVE REPORT AND DIRECTORY

MEDraysintell releases its updated World Market Report and Directory on Nuclear Medicine, Edition 2015, which in a 920-page document is providing a description and analysis of 335 radiopharmaceuticals and radionuclides and 160 companies and institutions active in nuclear medicine.

This new edition, written by experts, is more detailed than the previous edition, with 14 new products evaluated and with 24 additional companies assessed. Additionally, it presents an overview of the major manufacturing centers and their capacities for producing radionuclides on a country and regional basis; the status of the molybdenum shortage issue from an economic point of view; and comprehensive comparisons of estimated radionuclide and radiopharmaceuticals pricing observed in key regions of the world. As such, it becomes an exhaustive and detailed world directory of nuclear medicine with a full evaluation of both radiopharmaceutical products and nuclear medicine companies.

Several important changes occurred in the past year that will shape the short term of global nuclear medicine. The strong growth of radiotherapeutics represented 8% of the total nuclear medicine market in 2014, versus 4% in 2013, driven by the success of Xofigo (Bayer). It is expected that radiotherapeutics will represent over 50% of the US\$ 24 billion nuclear medicine market in 2030.

In radiodiagnostics, the recent developments in Gallium-68 makes the year 2015 a milestone for the development of this technology, which in the next five years will lead to a complete new PET environment. It seems that the future of radiodiagnostics will entirely be based on Technetium-99m for SPECT and on Fluorine-18 / Gallium-68 for PET.

The conventional pharmaceutical industry has gradually become interested in nuclear medicine with some recent M&A activity – Bayer acquired Algeta; Sun Pharmaceutical Industries acquired Pharmedica; Otsuka Pharmaceuticals entered into a global licensing and collaboration agreement with NuView Life Sciences; Norgine entered into a partnership with Navidea; and most recently, the pharmaceutical group, Ipsen, acquired OctreoPharm Sciences. In addition, the market saw some major consolidations with AAA acquiring Atreus and IHS acquiring IBA Molecular North America to merge with their Zevacor.

The global market for nuclear medicine reached US\$ 4.3 billion in 2014 compared to US\$ 4.1 billion in 2013, exhibiting growth of 5%. Without the exchange rate effect against the US dollar, the market would have reached US\$ 4.5 billion, and thus would have showed growth of 10% versus 2013. Presently, the global nuclear medicine market is rather fragmented, with nearly 70 companies selling radiopharmaceuticals on a regular basis. Three companies control almost half of the world market while 56 firms share 14% of the market. Though nuclear medicine is not a recent science, the past years have witnessed the emergence of new radionuclides, and over 35 companies are involved in research and development but not yet selling radiopharmaceuticals.

New opportunities lie ahead in the nuclear medicine landscape. This potential has been identified not only in the radiodiagnostic area, but most notably in therapeutic radiopharmaceuticals, with the first products scheduled to reach the market before the end of 2020. Opportunities exist for larger groups or investors to finance such development, to merge with key partners and/or to acquire companies.

More information and a table of contents are available at:

http://medraysintell.com/Nuclear_Medicine.html

MEDraysintell will be present at the EANM congress in Hamburg, Germany in October 2015, booth 177/183/184 within the Rad4Med.be Pavilion.



About MEDraysintell

Medical Radiation Strategic Intelligence Experts
Bringing value to Businesses and Investors!

MEDraysintell was founded in 2013 by Paul-Emmanuel Goethals (CSIntell) and Richard Zimmermann (Chrysalium Consulting). It combines over 40 years of experience in nuclear medicine, proton therapy and radiotherapy. We aim to form an international team of experts in the field of medical radiation to provide strategic intelligence in nuclear medicine, radiotherapy, proton therapy and brachytherapy to help our clients better understand the market – the competitive environment as well as the potential for mergers and acquisitions (M&A) – and technology development. MEDraysintell supports the decision process of manufacturers of radiopharmaceuticals and therapeutic radioisotopes, suppliers of equipment and software and members of the investor community. www.medraysintell.com

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