



**LEADING INTELLIGENCE
FOR NUCLEAR MEDICINE
INNOVATION**

OUR COMPANY

MEDraysintell provides first-rate strategic market and clinical intelligence for nuclear medicine innovation, leveraging decades of combined expertise in medical applications of ionising radiations. Since 2024, MEDraysintell is part of NucAdvisor, a nuclear consulting firm within Soletanche Freyssinet (VINCI Group).



100+

Global customers



2014

First edition of
MEDraysintell Nuclear
Medicine reports



1000+

Radiopharmaceuticals
monitored in our report



425+

Companies monitored

WHAT WE OFFER

- **5,500+ pages of exclusive data** covering radiopharmaceuticals, radionuclides, detailed company profiles and equipment.
- **Continuous technology monitoring** by our dedicated expert team to keep clients informed of emerging trends.
- **Valuable industry insights** gained from active participation in major events, congresses, and panel discussions.
- **Tailored support** for investors, industry leaders, consultants, and research institutions, designed to meet specific needs.
- **Multi-source data collection** including publications, event proceedings, press releases, public databases, and direct industry exchanges.

WHY CHOOSE US ?

- **Track market trends** accurately
- **Analyze competitive landscapes** with clarity
- **Spot M&A opportunities** quickly
- **Develop innovation strategies** for growth
- **Act with confidence** using actionable insights
- **Make informed decisions** guided by deep industry expertise

OUR NUCLEAR MEDICINE SERIES



A trusted partner for 100+ industry leaders



Volume I - Current landscape of the nuclear medicine market

This report offers a comprehensive overview of the current global nuclear medicine market, providing insights on its evolving dynamics and trends. It includes detailed analyses of radionuclides and marketed radiopharmaceuticals, while also presenting thorough profiles of leading companies and institutions active in the field worldwide.

Key contents:

- Latest market trends and key events
- Strategic analysis of the radiopharmaceutical market
- 140 radionuclides detailed
- Review of 120+ marketed radiopharmaceuticals
- 190 companies monitored



Why this report matters for your business ?

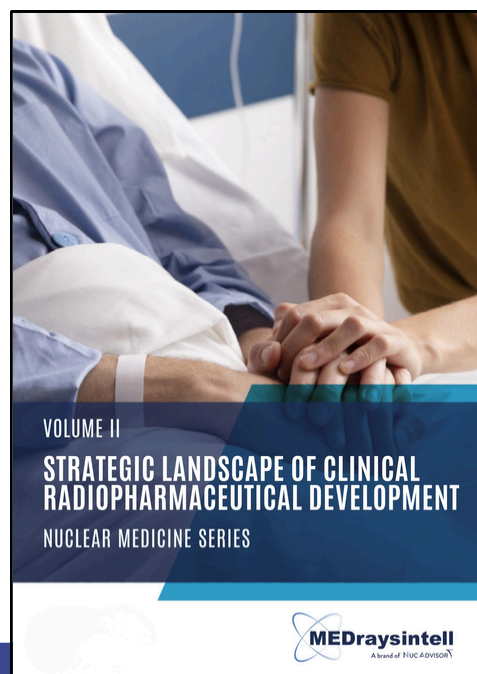
- Stay ahead : monitor market shifts and emerging trends in nuclear medicine
- Navigate the landscape : understand competitive dynamics
- Seize opportunities : leverage comprehensive market intelligence, product analyses, and detailed company profiles to make informed strategic decisions

Volume II - Strategic landscape of clinical radiopharmaceutical development

This report delivers a comprehensive analysis of radiopharmaceuticals currently in clinical development offering valuable insight into the next generation of innovations in nuclear medicine. It features in-depth evaluations of key radionuclides and presents detailed profiles of all major companies and institutions actively engaged in developing clinical-stage radiopharmaceuticals worldwide.

Key contents:

- Strategic analysis of the radiopharmaceutical market
- Detailed radionuclides profiles
- Exclusive review of 190 radiopharmaceuticals under active clinical development and 80 RP on hold
- 110 companies monitored



Why this report matters for your business ?

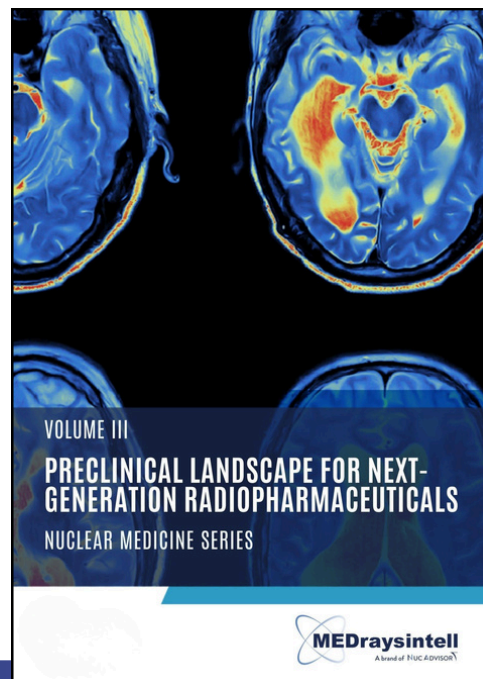
- For stakeholders, investors & researchers : strategic insights into clinical-stage radiopharmaceuticals
- Anticipate innovation trends : stay ahead in a rapidly evolving field
- Identify opportunities : track emerging targeted nuclear medicine therapies and market potential

Volume III - Preclinical landscape for next-generation radiopharmaceuticals

This report provides a detailed description and analysis of radiopharmaceuticals currently in preclinical and early-stage development, offering a clear view into the foundational stages of innovation in nuclear medicine. It also includes comprehensive profiles of all companies actively engaged in developing these emerging tracers and therapeutic agents, mapping the global landscape of early-stage radiopharma R&D.

Key contents:

- Latest market trends and key events
- Exclusive review of 600+ molecules under preclinical development
- 140 companies monitored
- Complete index of radiopharmaceuticals (A-Z)

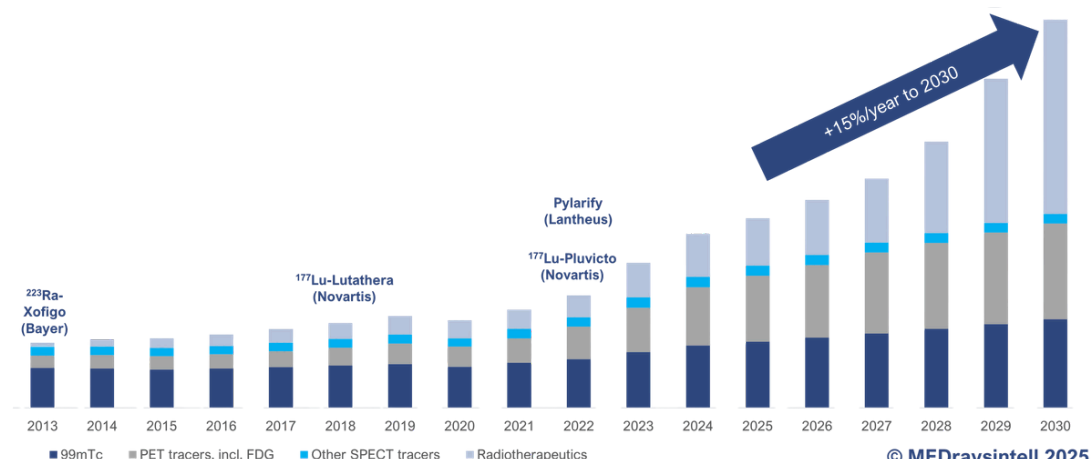


Why this report matters for your business ?

- Understand early-stage innovation in nuclear medicine, focusing on preclinical RP
- Monitor next-generation of diagnostic and therapeutic radiopharmaceuticals to assess scientific strengths, limitations, and strategic positioning of hundreds of molecules
- Guide R&D and investment decisions : anticipate trends, allocate resources, and align long-term strategies with promising opportunities

LATEST EVOLUTIONS ON THE NUCLEAR MEDICINE MARKET

According to MEDraysintell, the global nuclear medicine market reached US\$ 11.2 billion in 2024, marking a 20% year-on-year increase. One of the most notable drivers of this growth has been the rapid rise of radiotherapeutics, which expanded from just 6% of the market in 2013 to 25% by 2024. Several radiotherapeutics with strong revenue potential are expected to enter the market by 2030, most of them labeled with Lutetium-177 (^{177}Lu). The concept of radiotheranostics is gaining full traction and interest in alpha emitters, particularly Actinium-225 (^{225}Ac), is surging, fueling the launch of numerous new projects, many backed by major pharmaceutical companies. This dynamic landscape creates significant opportunities for strategic collaborations, and explore mergers to capitalize on the sector's momentum.

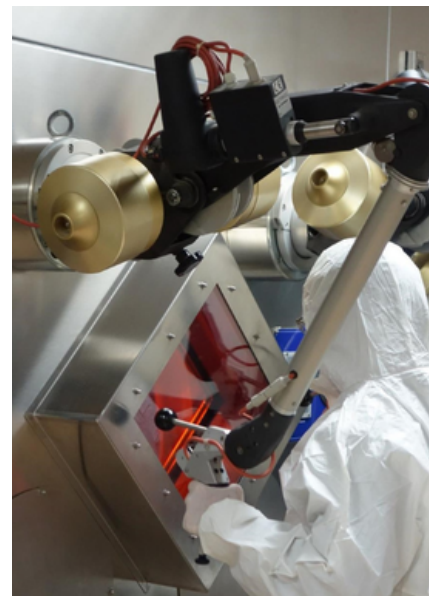


OUR CONSULTING SERVICES

SUPPORT TO THE INDUSTRY

From innovative labs developing new therapies to global manufacturers supplying hospitals, MEDraysintell supports the entire supply chain from the radionuclide and radiopharmaceutical industry : raw materials, enrichment, irradiation, and processing to radiopharmaceutical manufacturing, transport, and use in medical environment. Our expertise ensures safe, efficient, and scalable operations at every stage.

- **Market intelligence and strategy** : tailored studies, business case development, and optioneering to guide strategic decisions
- **Industrial strategy & investments** : high-level advisory, design, and scale-up of manufacturing capabilities
- **Owner's engineer services** : support for irradiation facilities (research reactors, accelerators, etc.), from early design to commissioning and operational management



SUPPORT TO INVESTORS

MEDraysintell supports investors and consulting firms with due diligence and advisory across the radiopharmaceutical and radionuclide supply chains.

- **Strategic assessments** : stakeholder mapping, competitive landscape, risk evaluation
- **Market & business analysis** : research, business models, optioneering studies
- **M&A advisory** : technical & financial due diligence
- **Audits & project reviews** : independent evaluations
- **Investment planning & expert calls** : project guidance and direct engagement



SUPPORT TO PUBLIC INSTITUTIONS

MEDraysintell contributes to European Commission DG ENER & JRC initiatives on ionising radiation in healthcare, from quality and safety to securing medical radioisotope supply in Europe.

- **Supply chain & market insights** : radionuclide mapping, demand forecasts, optioneering studies
- **Regulatory support** : compliance assessments and application of EU/national regulations
- **Event coordination** : organisation and technical support for scientific conferences and workshops



OUR REFERENCES



Analysis of European PET radiodiagnostic tracer market

Client: Confidential

We supported a major PET radiotracer company with a strategic analysis of the European PET market and its projected evolution over the next decade. The study covered :

- Pricing trends for FDG, FCH, and new tracers (PSMA, FAPI, GRPR)
- Reimbursement systems across European countries
- Manufacturing and competitive landscape
- Pipeline analysis of PET radiodiagnostics, including neurology
- Assessment of the PET scanner installed base in Europe

Nuclear compliance audits of radiopharmaceutical installations (Asia)

Client: Confidential

The MEDDraysintell team conducted compliance audits at various radiopharmaceutical manufacturing sites (PET, SPECT, and therapeutic) to assess regulatory status and long-term compliance with nuclear regulations. The evaluation covered :

- Licensing & compliance : status, renewals, constraints
- Waste & transport : management and logistics risks
- Radiological protection : staff, public, environment
- Safety & security : organisation, boundaries, documentation
- Incidents & inspections : past events, preparedness, corrective actions



Technical support for due diligences in the nuclear medicine sector

Client: Different clients

We acted as a technical advisor on several due diligence projects for major investments in radioisotope and radiopharmaceutical facilities. Key tasks included :

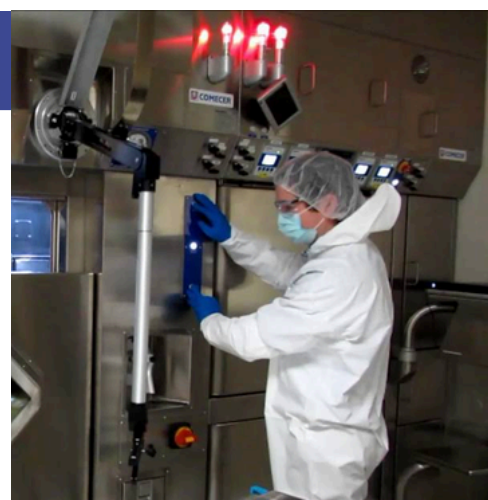
- Assessing CAPEX for nuclear safety improvements
- Evaluating OPEX, including equipment maintenance costs
- Analyzing production efficiency
- Conducting market

Optioneering study for a GMP RP manufacturing facility in Europe

Client: Confidential

MEDDraysintell conducted a comparative analysis of different options for the implementation of a radiopharmaceutical GMP manufacturing site in Europe, including :

- Definition of a manufacturing process
- Selection of equipment objectives
- Design feasibility study for each site, including: GMP compliance, nuclear regulatory and site-specific constraints, cost evaluation and schedules



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