

The MEDraysintell newsletter

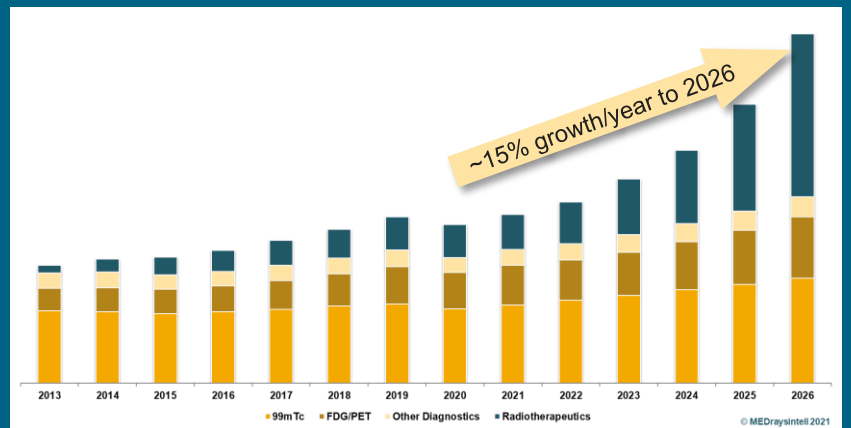
January 2022

Money continues to flow into the Radiopharma industry

Nearly 30 radiopharmaceutical companies were able to raise a total of over US\$ 1.5 billion in 2021 to finance their development. Funding flows increased by more than 12% in 2021 versus 2020. Resources came from institutional investors but also from a growing number of conventional pharmaceutical companies interested in developing radiopharmaceuticals. The most recent financial rounds include Full-Life Technologies (US\$ 10 million); Ablaze Pharmaceuticals and Curie Therapeutics raising each US\$ 75 million.

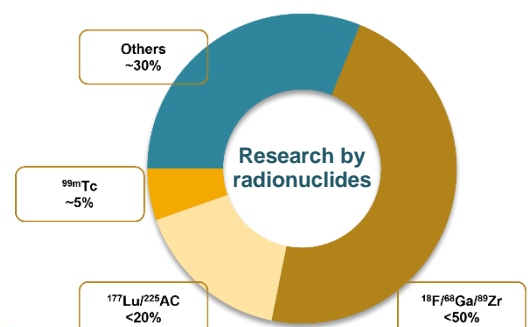
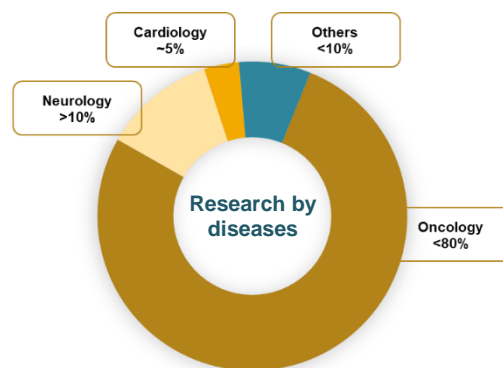
The global market for nuclear medicine reached just over US\$ 5.6 billion in 2020 somewhat declining from 2019, a direct consequence of the COVID-19 pandemic.

A new wave of growth is expected to start in 2022 with novel radiotherapeutics entering the market such as ^{177}Lu -PSMA-617 (Endocyte/Novartis) and ^{177}Lu -PNT2003 (POINT Biopharma)



Several hundreds radiopharmaceuticals are under development, less than 80% of them are targeting Oncology and more than 10% Neurology. Close to 50% of the products under development are labelled with ^{18}F , ^{68}Ga or ^{89}Zr , while close to 20% are labelled with ^{177}Lu or ^{225}Ac .

Over 100 companies presently involved in research and development, are still not yet selling radiopharmaceuticals.



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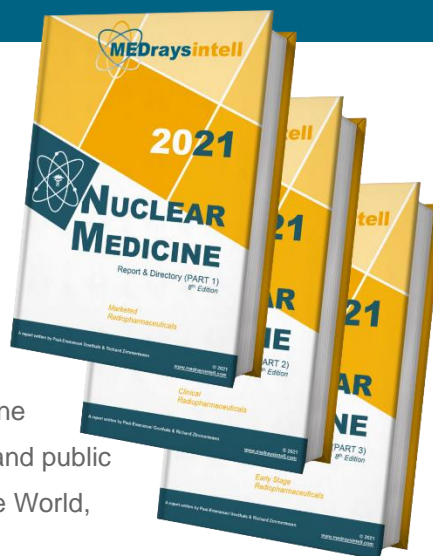
Nuclear Medicine Report & Directory Edition 2021

- A set of three reports (over 3,100 pages)
- 870 products extensively described including about 600 radiopharmaceuticals under clinical or preclinical/early stage development
- 340 companies active in nuclear medicine comprehensively profiled
- 2,700 bibliographical references and their Web links.

Marketed Radiopharmaceuticals

Clinical Radiopharmaceuticals

Early Stage Radiopharmaceuticals

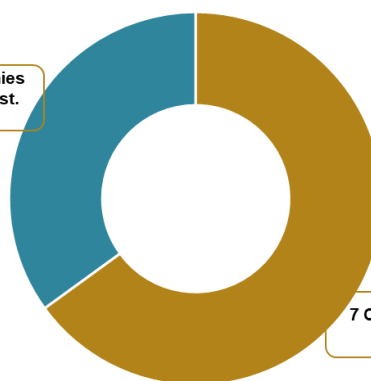


In 2020, seven companies controlled 65% of the world nuclear medicine market, the remaining 35% of the market is shared by 81 companies and public institutions. Over 100 radiopharmaceuticals were marketed around the World, but some were only available locally. The top 4 radiopharmaceuticals accounted for 20% of the world market. ^{99m}Tc based radiopharmaceuticals accounted for less than 50% of the world market (in US\$), radiotherapeutics accounted for almost 21%.

The concept of radiotheranostics is now in all minds. ^{177}Lu labeled drugs will mainly develop in parallel to their equivalent ^{68}Ga or ^{89}Zr labeled tracers (radiotheranostic approach).

New opportunities for development, investments, mergers and acquisitions are just popping up.

81 Companies
+ Public Inst.
35%



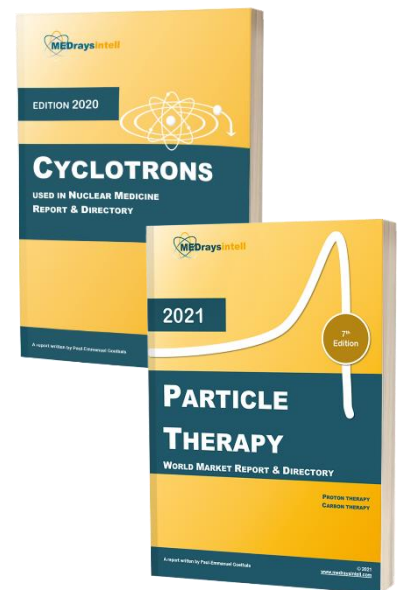
7 Companies
65%

The MEDraysintell newsletter

MEDraysintell is a team of international experts providing first-rate strategic intelligence in nuclear medicine, cyclotron, proton therapy and brachytherapy. We offer the most comprehensive set of reports and directories, with over 4,200 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 better understand the markets, the competitive environment as well as the potential of merger and acquisitions (M&A) and technology development. We have repeated 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 a century of experience in radiation healthcare.

Cyclotrons and Proton Therapy

Two other well reputed Reports and Directories are available, one covering about 1,500 cyclotrons worldwide dedicated to the production of medical radionuclides (for nuclear medicine - radiopharmaceuticals). The other reviewing the particle therapy (Proton & Carbon) market dynamics including a directory of all PT facilities that are expected to become operational by 2025.



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