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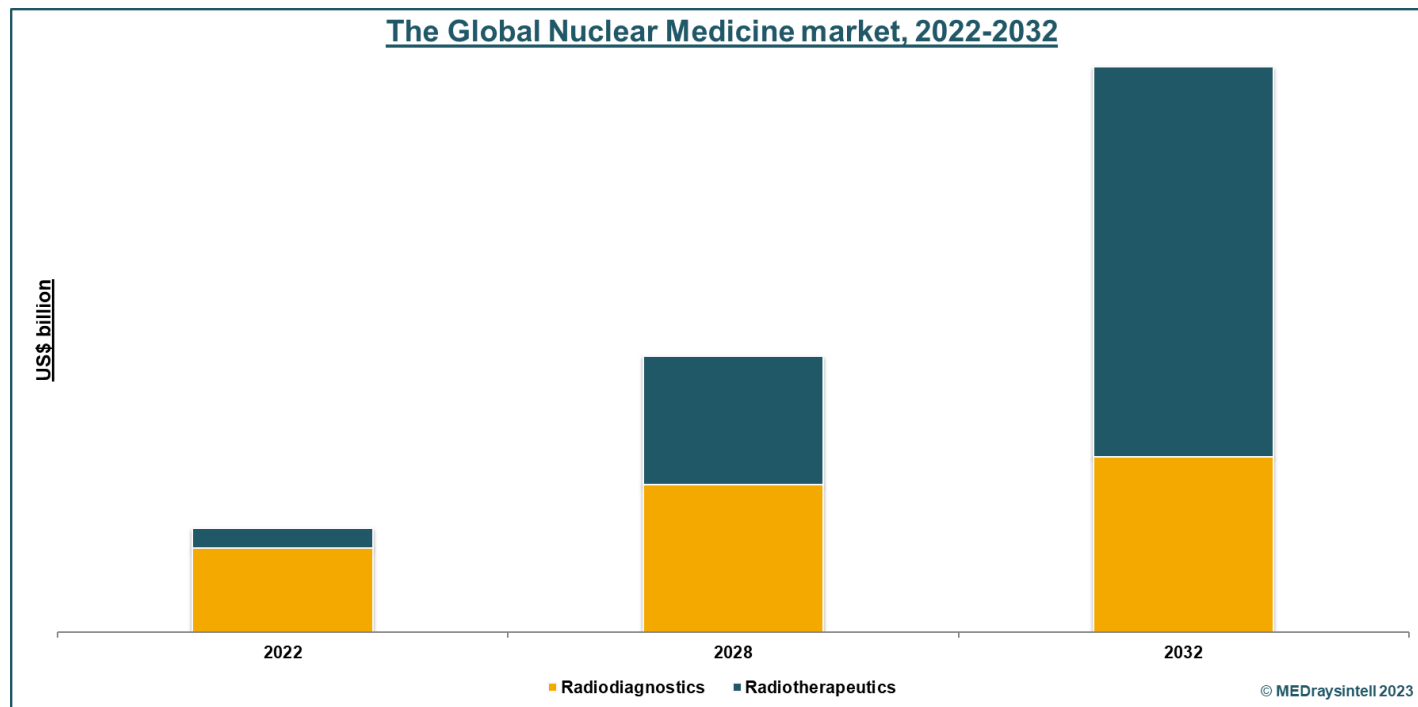
NUCLEAR MEDICINE

Report & Directory

10th Anniversary edition

Nuclear Medicine, Edition 2023

- The global market for nuclear medicine reached over US\$ 7 billion in 2022, growing by 15% from 2021
- The market is expected to reach US\$ 39 billion by 2032

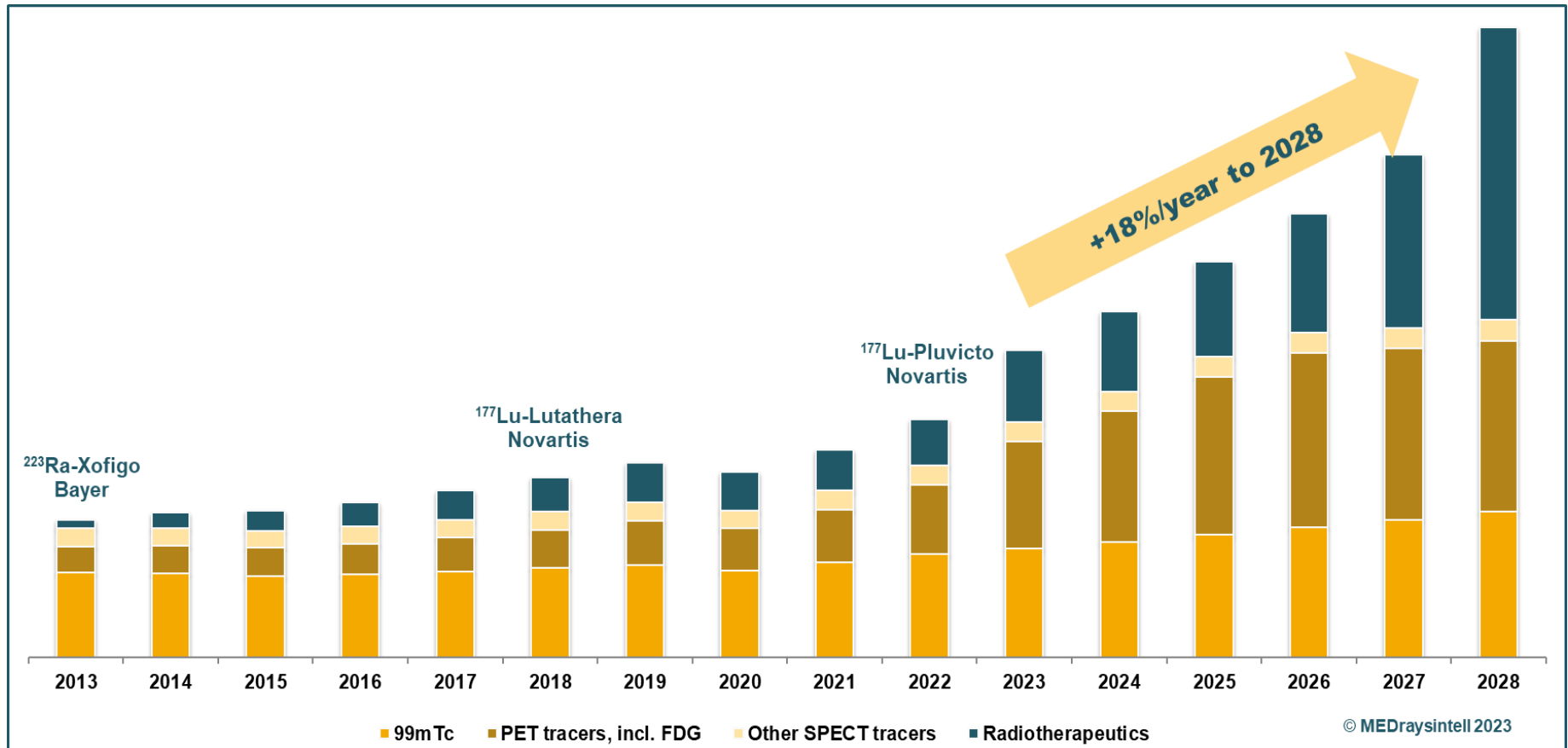


Nuclear Medicine, Edition 2023

- Nuclear medicine continues to be a niche market, accounting for less than 1% of the worldwide pharmaceutical industry. Nevertheless, there are promising prospects on the horizon, particularly in the field of radiotherapeutics
- In 2022, radiotherapeutics made up 20% of the global nuclear medicine market, and this share is projected to increase to 70% by 2032
- New radiotheranostics under development might lead to much stronger market figures than expected in coming years

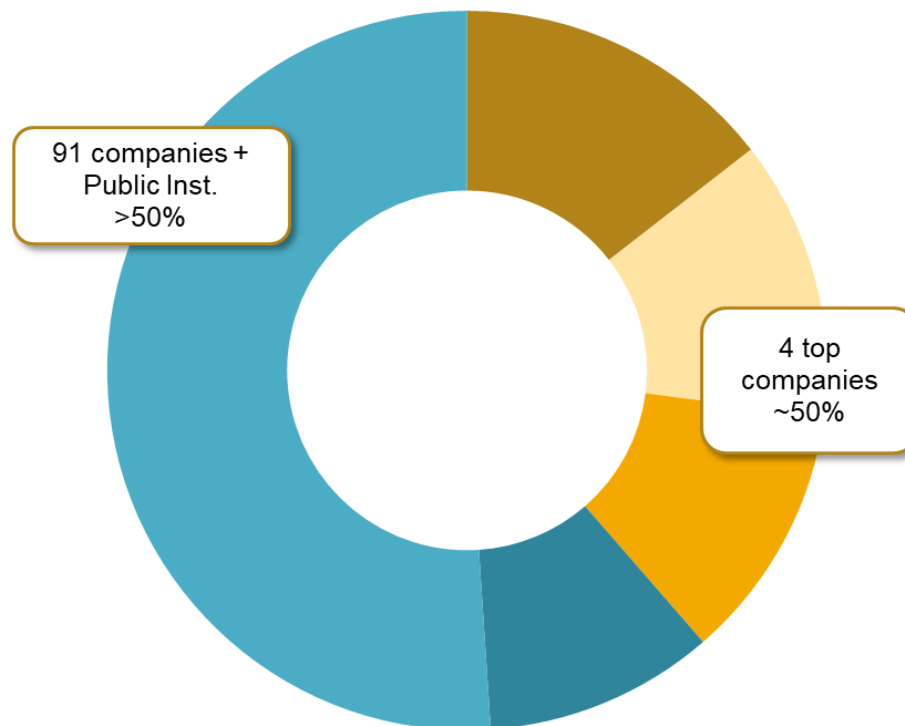
Nuclear Medicine, Edition 2023

- Numerous promising radiotherapeutics with substantial revenue prospects are poised to enter the market by 2028



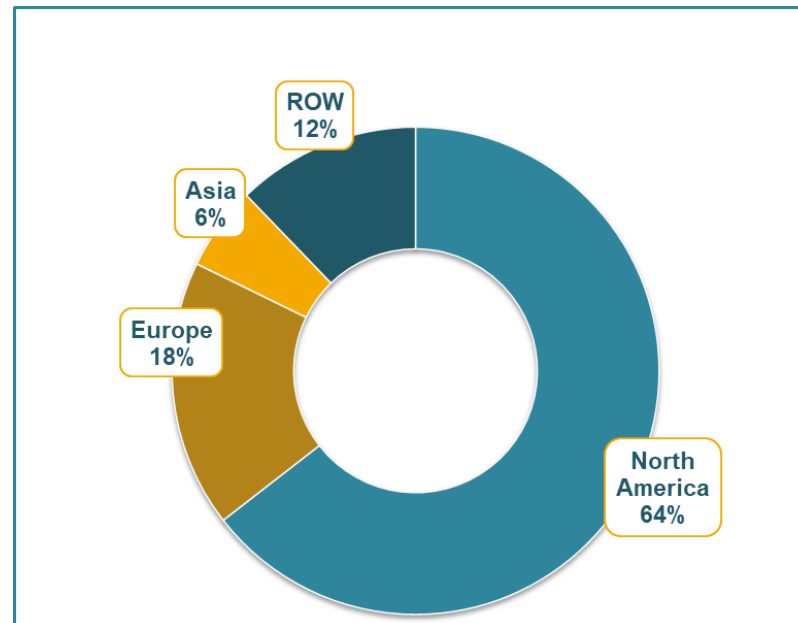
Nuclear Medicine, Edition 2023

- In 2022, nearly half of the global nuclear medicine market was dominated by four companies, while the other half was distributed among 91 companies and public institutions



Nuclear Medicine, Edition 2023

- In 2022, 35 radiopharmaceutical companies raised US\$1.4 billion in funding for their development
- Radiopharmaceutical development has been funded by both institutional investors and, increasingly, traditional pharmaceutical companies
- North American firms took 64% of the funding in 2022

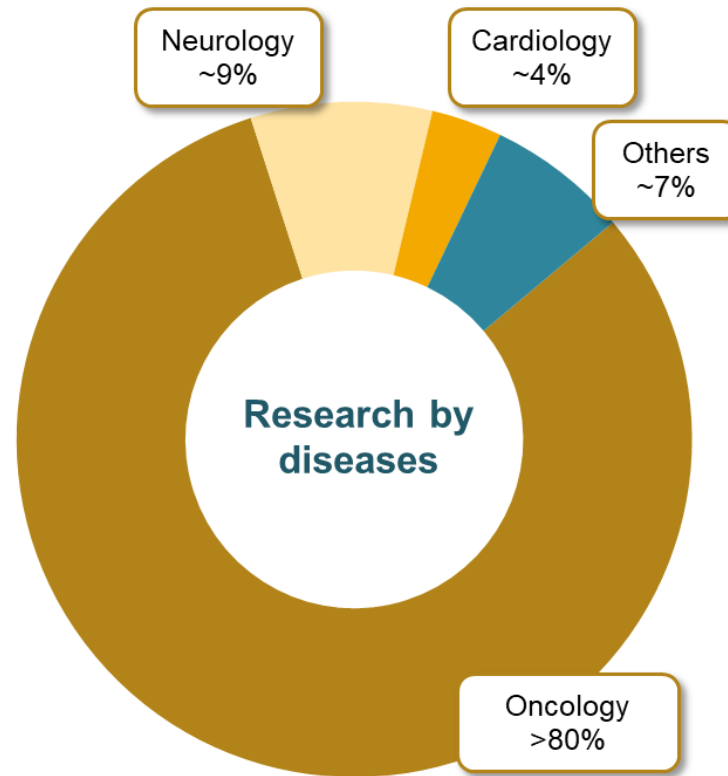


Nuclear Medicine, Edition 2023

- In the latter part of 2023, the radiopharmaceutical industry witnessed two significant M&A transactions, with Bristol-Myers Squibb acquiring RayzeBio for a sum of US\$ 4.1 billion, and Eli Lilly securing POINT Biopharma for US\$ 1.4 billion.
- Adding to the developments, in January 2024, Jubilant Pharma announced its plan to sell its complete 25.8% equity holding in Sofie Biosciences, for a total of US\$ 139.4 million, to private equity funds overseen by Trilantic Capital Partners. In addition, Alliance Medical Group has been sold to a British investment fund for just over US\$ 1 billion.

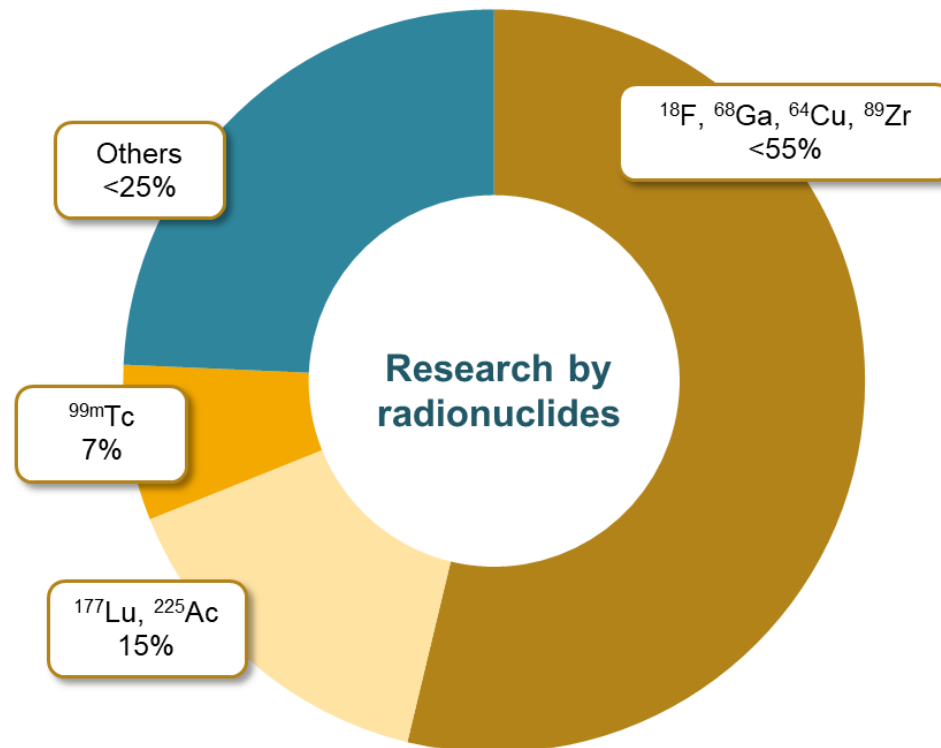
Nuclear Medicine, Edition 2023

- Several hundreds radiopharmaceuticals are under development, the majority (80%) of them are targeting Oncology



Nuclear Medicine, Edition 2023

- Among the new tracers under development about 55% are labeled with ^{18}F , ^{68}Ga , ^{64}Cu or ^{89}Zr – and drugs are in priority labeled with ^{177}Lu or ^{225}Ac (15%)

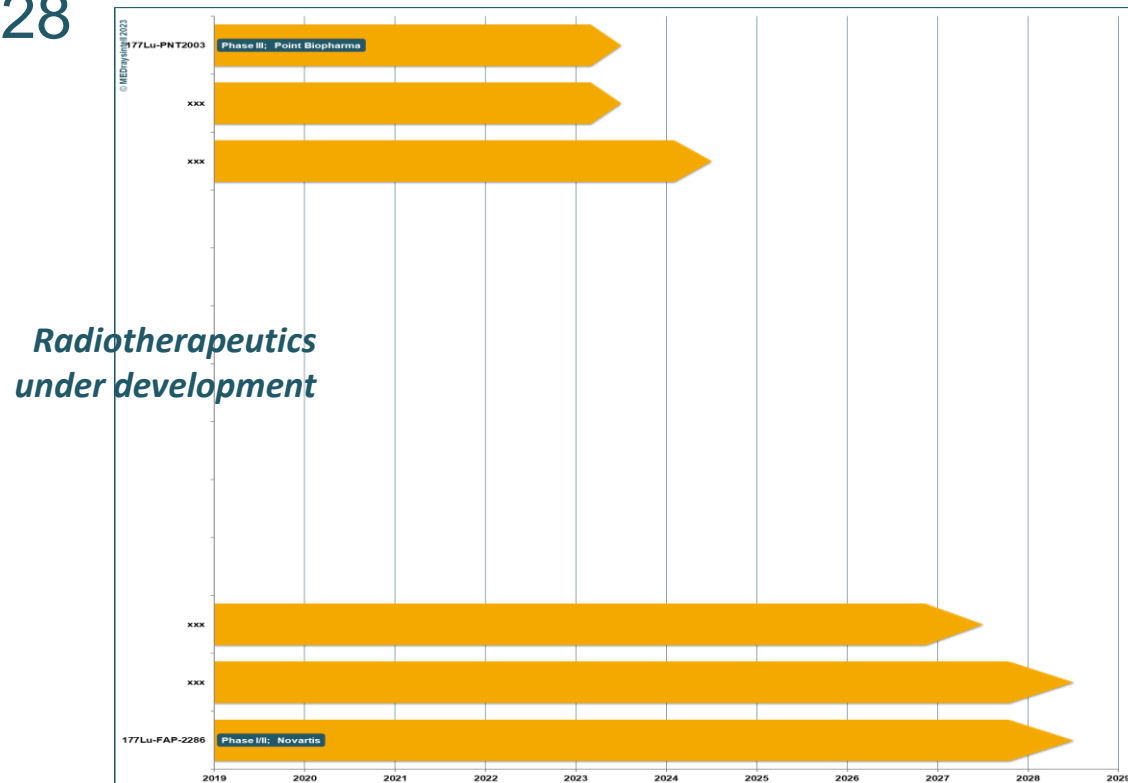


Nuclear Medicine, Edition 2023

- During 2022, about 120 radiopharmaceuticals were marketed around the World, but some were only available locally
- The top 5 radiopharmaceuticals accounted for >20% of the world market
- ^{99m}Tc based radiopharmaceuticals accounted for less than 45% of the world market (in US\$), radiotherapeutics accounted for 20%
- There is a large unexplored potential for new ^{99m}Tc -labeled tracers. Several dozen new proprietary PET tracers (labelled with ^{18}F , ^{68}Ga or ^{64}Cu) could reach the market before 2028
- The concept of radiotheranostics is now in all minds. ^{177}Lu labeled drugs will mainly develop in parallel to their equivalent ^{18}F , ^{68}Ga or ^{89}Zr labeled tracers (radiotheranostic approach)

Nuclear Medicine, Edition 2023

- Over 150 companies are currently developing one or more radiodiagnostic or radiotherapeutic from their own pipeline
- The pipelines for radiotherapeutic development reveal a substantial number of products that could potentially hit the market by 2028



Nuclear Medicine, Edition 2023

- Nuclear Medicine Report & Directory Edition 2023
 - A set of three reports (3,700 pages)
 - 1,070 products extensively described including radiopharmaceuticals under clinical or preclinical/early-stage development and including more than 130 radionuclides and generators
 - 410 companies active in NM comprehensively profiled
 - 3,600 bibliographical references and their Web links
- Numerous possibilities are present within the radiopharmaceutical sector. These opportunities extend beyond diagnostic radiopharmaceuticals. There are multiple openings for larger corporations or investors to fund these developments and potentially collaborate with strategic partners through M&A

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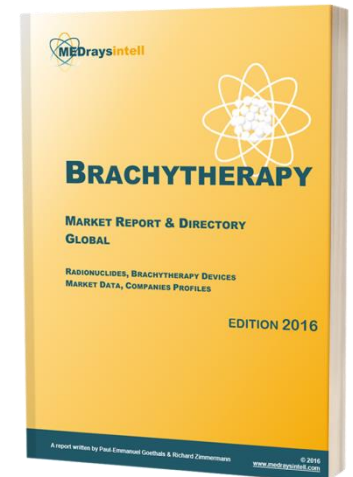
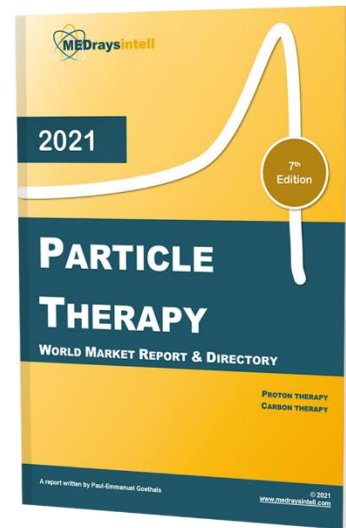
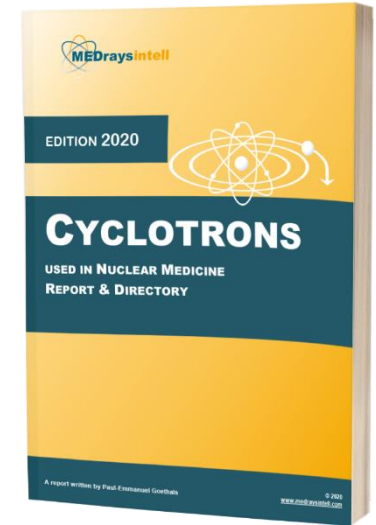
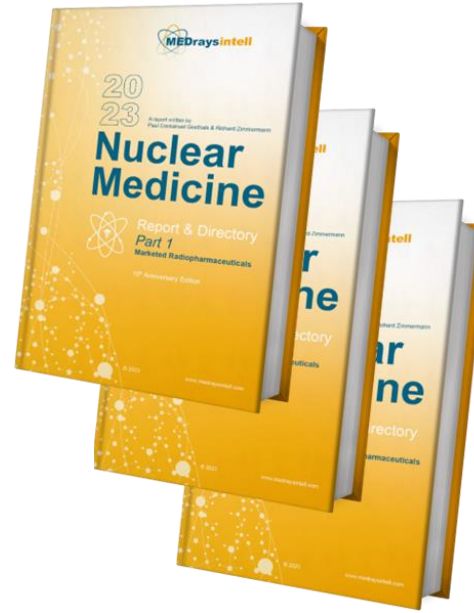
The team brings together more than 50 years of expertise in the field of radiation healthcare, with experience in:

- Nuclear Medicine
- Cyclotrons
- Particle therapy
- Brachytherapy

MEDraysintell provides strategic intelligence for the radiation healthcare to help clients understand

- Markets and Competitive environment
- Potential for M&A
- Technology development

The most comprehensive set of reports & directories with over 4,900 pages of unrivaled intelligence, covering some of the most exciting healthcare technologies using radiation for diagnosis and treatment



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