

Global Carbon-14 Radiosynthesis Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Carbon-14 Radiosynthesis Services market size is expected to reach \$ 333 million by 2032, rising at a market growth of 5.2% CAGR during the forecast period (2026-2032).

Carbon-14 Radiosynthesis Services refer to specialized technical services that design and execute the synthesis of compounds labeled with the radioactive isotope carbon-14 (^{14}C) for scientific research, drug development, and industrial applications. These services, typically offered by contract research organizations (CROs), academic research institutions, or specialized biotech service providers, follow custom-tailored workflows: they first select appropriate ^{14}C precursors (e.g., sodium acetate-1- ^{14}C , potassium cyanide- ^{14}C) based on the target compound's structure and client needs, then use chemical reactions like carbon-carbon bond formation, oxidation, or reduction to covalently incorporate ^{14}C into specific positions of the molecule—ensuring the isotope's stability and retention throughout the synthesis process. Ultimately, the ^{14}C -labeled compounds produced through these services enable clients (pharmaceutical companies, research labs, environmental agencies) to track molecular pathways, study long-term drug absorption, distribution, metabolism, and excretion (ADME) in preclinical and clinical studies, or analyze environmental pollutant degradation and carbon cycling in ecological research.

Key Findings

Carbon-14 remains preferred for pharmaceutical mass balance studies

GMP projects require expanded documentation testing and release controls

Pharmaceutical and biotechnology applications represent the largest demand segment

North America leads demand while Europe anchors specialist supply

Integrated radiosynthesis and ADME platforms strengthen provider differentiation

Complex peptides and conjugates expand high-value project opportunities

Market Trends

The Carbon-14 Radiosynthesis Services market is moving from isolated custom synthesis assignments toward integrated radiolabelled development programs that connect route design, isotope incorporation, analytical release, formulation, preclinical ADME, human mass-balance studies and metabolite identification. Pharmaceutical customers increasingly involve radiochemists earlier in development so that the carbon-14 position remains metabolically stable, the synthesis route can use commercially accessible radioactive precursors and sufficient material can be produced for successive study stages. Demand is also shifting toward more complex molecules, including chiral compounds, peptides, linker-payload structures, antibody-drug conjugates and other new therapeutic modalities that require expertise across synthetic chemistry, bioconjugation, purification and radioanalysis. Suppliers are strengthening capabilities for GMP production, low-activity clinical materials, microtracer programs and integrated accelerated mass spectrometry workflows. Digital batch records, electronic analytical data packages and stronger chain-of-custody documentation are becoming more important as projects move between synthesis laboratories, clinical units and analytical facilities. Carbon-14 remains the principal isotope for many mass-balance applications because it can be incorporated into the molecular carbon skeleton without materially changing the structure and has a sufficiently long half-life for extended development programs.

Market Dynamics

Drivers

The most important demand driver is the continuing regulatory role of radiolabelled mass-balance and ADME studies in drug development. The US Food and Drug

Administration states that human radiolabelled mass-balance studies are generally needed for new molecular entities because they clarify absorption, metabolic pathways, routes of elimination, total recovery and the need for additional metabolite safety evaluation. Carbon-14 accounted for 103 of 104 human radiolabelled mass-balance studies examined in an FDA-associated analysis, confirming its position as the dominant tracer for this application. Demand is also supported by crop-protection and environmental registration requirements. OECD crop and livestock metabolism guidelines specify radiolabelled test substances and identify carbon-14 as the preferred isotope for tracing residues, metabolites and degradation products. Growth in pharmaceutical pipelines, outsourcing by emerging biotechnology companies, environmental-fate testing and regulatory expectations for comprehensive metabolite characterization therefore supports recurring demand for specialized synthesis capacity.

Restraints

Market expansion is restrained by the technical complexity, long project cycles and limited availability of specialized infrastructure and personnel. Carbon-14 synthesis cannot always follow the established non-radioactive medicinal chemistry route because the number of commercially available carbon-14 building blocks is restricted and the label must be inserted at a position that remains stable during metabolism or environmental degradation. Low-yield reactions, radioactive waste generation, radiolytic degradation and losses during multistep purification can materially increase project cost. Providers must maintain licensed radioactive-material facilities, contamination controls, specialist analytical instruments, qualified personnel and compliant waste-management procedures even when project utilization fluctuates. International shipment also requires approved packaging, documentation and coordination with carriers and national authorities. These requirements create substantial entry barriers but can also limit capacity, extend lead times and complicate cross-border project scheduling.

Opportunities

The strongest opportunities lie in integrated development programs, GMP clinical supply and complex-molecule radiolabelling. Providers able to combine radiosynthetic chemistry with formulation, toxicology support, nonclinical ADME, human mass-balance studies, metabolite profiling and bioanalysis can capture a larger share of each drug-development program and reduce handoff risks for clients. New modalities create additional opportunities because peptides, oligonucleotide-related structures, antibody-drug conjugates and targeted delivery systems often require site-specific or multisite labelling strategies and specialized purification. Carbon-14 synthesis for low-dose microtracer and absolute bioavailability studies is another attractive field, particularly

when combined with accelerated mass spectrometry. Agrochemical, biocide and specialty chemical customers also provide diversification beyond pharmaceuticals because carbon-14 remains important for crop metabolism, livestock metabolism, soil degradation, water studies and environmental-fate assessment. Asian CROs with integrated chemistry and DMPK platforms are positioned to gain projects from global biotechnology companies seeking coordinated execution and competitive development timelines.

Challenges

The principal challenge is consistently delivering material that satisfies chemical, radiochemical and regulatory specifications despite the small quantities and complex reaction routes involved. A successful project must control label position, specific activity, chemical purity, radiochemical purity, stereochemical integrity, residual solvents, stability and formulation compatibility. Clinical projects impose additional requirements for protocol control, validated or qualified analytical methods, batch documentation, change management and formal release. Project delays may occur when a proposed labelling route proves unsuitable, an intermediate is unstable, purification recovery is low or insufficient radioactive precursor is available. Providers also face radiation-safety risk, environmental liability and a shortage of experienced radiochemists. Intellectual-property protection is particularly important because clients often disclose proprietary structures and unpublished synthetic routes. Finally, dependence on a limited number of specialist facilities can create supply-chain concentration risk if a laboratory experiences licensing delays, equipment downtime, contamination events or transport disruption.

Value Chain Analysis

The upstream value chain includes carbon-14 raw materials and labelled building blocks, non-radioactive starting materials, solvents, reagents, chromatography media, analytical standards, radioactive-material packaging and specialist laboratory equipment. Critical equipment includes controlled radiochemistry workstations, fume hoods or containment systems, preparative chromatography, radio-HPLC, liquid scintillation counters, mass spectrometers, NMR systems and stability-storage facilities. Upstream value is also created by radiation licensing, personnel training, dosimetry, waste disposal and qualified logistics services. The limited availability of suitable carbon-14 precursors makes procurement strategy and route planning important determinants of project economics.

Midstream service providers perform feasibility assessment, label-position selection,

cold-route development, radioactive precursor preparation, carbon-14 incorporation, purification, characterization, stability testing, formulation and batch release. Non-GMP materials are mainly used in discovery, preclinical ADME, environmental-fate and research studies, while GMP-compliant materials support human clinical administration. Downstream customers include pharmaceutical and biotechnology companies, agrochemical manufacturers, contract research organizations, specialty chemical companies, universities and regulatory laboratories. The highest value is created when the radiosynthesis provider integrates chemistry with analytical release and downstream study execution, thereby reducing material transfers, timeline uncertainty and responsibility gaps between multiple contractors.

Segment Insights

By quality standard, the market is divided into GMP-Compliant Services and Non-GMP Services. GMP-Compliant Services cover carbon-14 labelled APIs, clinical drug substances and other materials produced under controlled quality systems for human administration in mass-balance, microdosing or related clinical studies. These projects require formal manufacturing instructions, controlled raw materials, documented deviations, stability assessment, comprehensive analytical release and traceable packaging. GMP projects account for a smaller number of contracts but generally carry higher average project values because of the additional quality, analytical and regulatory workload. Providers with dedicated licensed GMP radiochemistry facilities and established regulatory inspection histories have a defensible competitive advantage in this segment.

Non-GMP Services account for the larger share of project volume and cover discovery compounds, preclinical ADME materials, metabolites, reference standards, agrochemical test substances, environmental-fate materials and exploratory research compounds. The segment is more diverse in molecular structure, quantity and analytical requirements, with competition based on synthetic problem-solving, delivery time, purity and cost.

Downstream Market Opportunities

Pharmaceutical and biotechnology companies represent the largest downstream customer group. Carbon-14 labelled compounds are used in nonclinical and human ADME, mass balance, metabolite profiling, tissue distribution, absolute bioavailability, drug-drug interaction support and the evaluation of peptides, conjugates and other complex modalities. Demand is concentrated around clinical-development milestones because the radiolabelled batch must be available before the corresponding study can

begin. Small and medium biotechnology companies create attractive outsourcing opportunities because they rarely maintain internal licensed radiochemistry facilities. Crop-protection companies form the second major application group, using carbon-14 materials in plant metabolism, livestock metabolism, rotational-crop, soil, water and environmental-fate studies. Specialty chemicals, biocides, cosmetics, academic research and industrial toxicology provide additional demand. Providers that can supply both labelled material and the associated analytical or ADME study are better positioned to secure recurring programs and become embedded in customer development workflows.

Regional Insights

North America is assessed as the largest demand region, supported by the scale of pharmaceutical and biotechnology research, FDA expectations for human radiolabelled mass-balance studies and a substantial crop-protection testing industry. The region also hosts established providers such as Revvity, Moravek, American Radiolabeled Chemicals and Labcorp. Competition ranges from specialist radiochemical manufacturers to integrated CRO platforms, while US radioactive-material licensing and transport requirements create significant compliance barriers.

Europe is the principal specialist supply cluster and contains experienced carbon-14 chemistry operations in the United Kingdom, Sweden and Germany. Eurofins-owned Selcia, Almac, Novandi Chemistry and Nuvisan provide capabilities spanning custom synthesis, GMP manufacture, isotope chemistry and integrated DMPK support. Europe also benefits from extensive pharmaceutical, agrochemical and chemical-regulation demand. Asia Pacific is the fastest-developing regional supply base, led by China-based integrated CROs such as Pharmaron and WuXi AppTec, together with specialist providers such as Beita Pharmatech. Japan, South Korea and Taiwan remain important end-user markets but have fewer internationally visible independent carbon-14 radiosynthesis facilities, resulting in greater reliance on overseas or integrated global suppliers.

Report Scope

This report studies the global Carbon-14 Radiosynthesis Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Carbon-14 Radiosynthesis Services, and provides market size (US\$ million) and Year-over-Year

(YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Carbon-14 Radiosynthesis Services that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Carbon-14 Radiosynthesis Services total market, 2021-2032, (USD Million)

Global Carbon-14 Radiosynthesis Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Carbon-14 Radiosynthesis Services total market, key domestic companies, and share, (USD Million)

Global Carbon-14 Radiosynthesis Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global Carbon-14 Radiosynthesis Services total market by Type, CAGR, 2021-2032, (USD Million)

Global Carbon-14 Radiosynthesis Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Carbon-14 Radiosynthesis Services market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Eurofins, Revvity, Selcia, Novandi Chemistry, Almac, Pharmaron, WuXi AppTec, Nuvisan, Alfa Cytology, Headway, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Carbon-14 Radiosynthesis Services market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Carbon-14 Radiosynthesis Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Carbon-14 Radiosynthesis Services Market, Segmentation by Type:

GMP - Compliant Services

Non - GMP Services

Global Carbon-14 Radiosynthesis Services Market, Segmentation by Compounds Type:

Volatile Compounds

Aromatics and Heterocyclics

Other

Global Carbon-14 Radiosynthesis Services Market, Segmentation by Detection Method:

Liquid Scintillation and Solid Scintillation Methods

Ionization Method

Global Carbon-14 Radiosynthesis Services Market, Segmentation by Application:

Medical

Chemical Research

Others

Companies Profiled:

Eurofins

Rewvity

Selcia

Novandi Chemistry

Almac

Pharmaron

WuXi AppTec

Nuvisan

Alfa Cytology

Headway

ViTrax

Beita Pharmatech Co., Ltd.

Moravek, Inc.

Labcorp

American Radiolabeled Chemicals, Inc.

Frontage Laboratories

Key Questions Answered

1. How big is the global Carbon-14 Radiosynthesis Services market?
2. What is the demand of the global Carbon-14 Radiosynthesis Services market?
3. What is the year over year growth of the global Carbon-14 Radiosynthesis Services market?
4. What is the total value of the global Carbon-14 Radiosynthesis Services market?
5. Who are the Major Players in the global Carbon-14 Radiosynthesis Services market?
6. What are the growth factors driving the market demand?

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