

Global Carbon-14 Radiosynthesis Services Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Carbon-14 Radiosynthesis Services market size was valued at US\$ 235 million in 2025 and is forecast to a readjusted size of US\$ 333 million by 2032 with a CAGR of 5.2% during review period.

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 is a detailed and comprehensive analysis for global Carbon-14

Radiosynthesis Services market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Carbon-14 Radiosynthesis Services market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Carbon-14 Radiosynthesis Services market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Carbon-14 Radiosynthesis Services market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Carbon-14 Radiosynthesis Services market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Carbon-14 Radiosynthesis Services

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key 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.

Market segmentation

Carbon-14 Radiosynthesis Services market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

GMP - Compliant Services

Non - GMP Services

Market segment by Compounds Type

Volatile Compounds

Aromatics and Heterocyclics

Other

Market segment by Detection Method

Liquid Scintillation and Solid Scintillation Methods

Ionization Method

Market segment by Application

Medical

Chemical Research

Others

Market segment by players, this report covers

Eurofins

Revvity

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

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Carbon-14 Radiosynthesis Services product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Carbon-14 Radiosynthesis Services, with revenue, gross margin, and global market share of Carbon-14 Radiosynthesis Services from 2021 to 2026.

Chapter 3, the Carbon-14 Radiosynthesis Services competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Carbon-14 Radiosynthesis Services market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Carbon-14 Radiosynthesis Services.

Chapter 13, to describe Carbon-14 Radiosynthesis Services research findings and conclusion.

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