

Global Nuclear Medicine Radioisotope Production Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Nuclear Medicine Radioisotope Production Systems market size is expected to reach \$ 1991 million by 2032, rising at a market growth of 9.7% CAGR during the forecast period (2026-2032).

Nuclear Medicine Radioisotope Production Systems are integrated system level equipment used to produce, separate, process and prepare medical radionuclides for nuclear medicine diagnosis, therapy and radiopharmaceutical research. Their core function is to convert stable target materials, parent nuclides or precursor materials into clinically usable medical radioisotopes through particle acceleration, target irradiation, reactor neutron irradiation, generator elution, radiochemical separation, shielded transfer and automated dispensing. These systems mainly cover medical cyclotron systems, solid target systems, liquid target systems, gas target systems, radionuclide transfer systems, hot cells, shielded isolators, automated dispensing units, radiochemistry synthesis modules, generator and separation modules, quality control units, radiation monitoring devices, safety interlock systems and clean production infrastructure. Key specifications include particle energy, beam current, target power handling capacity, isotope yield, radiochemical purity, automation level, shielding thickness, cleanroom grade, system availability, remote maintenance capability and GMP compatibility. The main applications include PET diagnostic isotope production, SPECT diagnostic isotope production, therapeutic isotope production, parent isotope preparation, on site production in hospital nuclear medicine centers, regional supply by commercial radiopharmacies, national isotope center construction and translational research for radiopharmaceuticals. The product is positioned as a high reliability and high compliance production system rather than a single laboratory instrument, because it combines nuclear engineering, radiation protection, radiochemistry, pharmaceutical

manufacturing and digital quality management. In 2025, the global average price of Nuclear Medicine Radioisotope Production Systems was approximately USD 2.5 million to USD 8.0 million per unit, the number of new and upgraded equivalent system units was about 150 to 220 units, and the global average gross margin was about 35% to 50%.

Nuclear Medicine Radioisotope Production Systems are positioned in the midstream equipment layer of the nuclear medicine value chain. The upstream side includes accelerator components, target materials, shielding materials, vacuum systems, RF systems, magnets, power supplies, hot cell materials, automation control, cleanroom engineering and quality control instruments. The midstream layer consists of radionuclide production systems, target systems, hot cells, generator platforms, separation modules and integrated production lines. The downstream side includes hospital nuclear medicine departments, commercial radiopharmacies, national isotope centers, radiopharmaceutical research organizations and therapeutic radiopharmaceutical production sites. The strategic value of this industry is not limited to the equipment itself. Its real value lies in the ability to create stable, safe and compliant isotope production capacity, while supporting the transition from diagnostic isotope supply to therapeutic isotope production and theranostic isotope platforms.

The global competitive landscape is shaped by both high technical specialization and regional supply chain restructuring. Europe, North America and Japan have accumulated strong capabilities in medical cyclotrons, high performance target systems, hot cells, radiochemistry automation and in reactor isotope production engineering. These regions still dominate the high end system and critical subsystem segments. China, parts of Asia and the Middle East are showing faster demand growth, supported by nuclear medicine center expansion, regional radiopharmacy construction, import substitution and broader healthcare infrastructure investment. As isotope supply security becomes a policy priority for healthcare systems and nuclear technology programs, more countries are investing in domestic production capacity. This trend is increasing the importance of localized, compact, modular and serviceable production systems.

The application structure is shifting from conventional PET diagnostic isotope production toward multi isotope production platforms. Historically, demand was mainly driven by routine PET and SPECT isotopes, with system configurations centered on low energy medical cyclotrons, hot cells and dispensing equipment. Current growth is increasingly linked to therapeutic isotopes, parent isotopes, solid target processing, generator separation and complete GMP production lines. Theranostic drugs, targeted

radioligand therapy and the need for local supply of short lived isotopes are encouraging customers to move from single equipment purchases to system level investment. In the future product mix, high automation target systems, remote operated hot cells, digital batch records, automated synthesis and dispensing, and high activity handling capability will become more important.

Policy environment and capital expenditure cycles have a strong influence on this market. Medical isotope supply is connected with public health, nuclear safety, drug regulation, radiation protection and strategic supply security, so government support, nuclear facility licensing, hospital construction plans and radiopharmaceutical approval schedules all affect equipment procurement. Recent global isotope supply disruptions, aging reactor infrastructure, rising interest in therapeutic radiopharmaceuticals and the expansion of nuclear medicine services are moving the industry from occasional equipment purchases toward long term capacity building. The outlook is positive, but equipment market growth will not fully mirror the growth rate of radiopharmaceutical sales because system delivery cycles are long, installation and validation are complex, regulatory review is strict and customer capital spending is staged. Overall, the industry is expected to maintain steady growth, with high end system capability and localized supply support becoming the key competitive priorities.

This report studies the global Nuclear Medicine Radioisotope Production Systems production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Nuclear Medicine Radioisotope Production Systems 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 Nuclear Medicine Radioisotope Production Systems that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Nuclear Medicine Radioisotope Production Systems total production and demand, 2021-2032, (Units)

Global Nuclear Medicine Radioisotope Production Systems total production value, 2021-2032, (USD Million)

Global Nuclear Medicine Radioisotope Production Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Nuclear Medicine Radioisotope Production Systems consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Nuclear Medicine Radioisotope Production Systems domestic production, consumption, key domestic manufacturers and share

Global Nuclear Medicine Radioisotope Production Systems production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Nuclear Medicine Radioisotope Production Systems production by Production Route, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Nuclear Medicine Radioisotope Production Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Nuclear Medicine Radioisotope Production Systems market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Ion Beam Applications SA, GE HealthCare Technologies Inc., Sumitomo Heavy Industries, Ltd., Advanced Cyclotron Systems Inc., Best Theratronics Ltd., PMB SAS, Sichuan Longevous Beamtech Co., Ltd., China Institute of Atomic Energy, ARTMS Inc., Comecer S.p.A., 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 Nuclear Medicine Radioisotope Production Systems market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Production Route, 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 Nuclear Medicine Radioisotope Production Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Nuclear Medicine Radioisotope Production Systems Market, Segmentation by Production Route:

Cyclotron based Production Systems

Reactor Irradiation Production Systems

Generator and Separation Production Systems

Electron Accelerator and Neutron Source Production Systems

Others

Global Nuclear Medicine Radioisotope Production Systems Market, Segmentation by Energy Level:

Compact Low Energy Systems (<20 MeV)

Medium Energy Multi Isotope Systems (20 to 35 MeV)

High Energy Isotope Production Systems (>35 MeV)

Others

Global Nuclear Medicine Radioisotope Production Systems Market, Segmentation by Application:

- Hospital Nuclear Medicine Centers
- Commercial Radiopharmacies
- National Isotope Production Centers
- Research Institutes and Universities
- Nuclear Reactor Facilities
- Radiopharmaceutical CDMO Sites
- Others

Companies Profiled:

- Ion Beam Applications SA
- GE HealthCare Technologies Inc.
- Sumitomo Heavy Industries, Ltd.
- Advanced Cyclotron Systems Inc.
- Best Theratronics Ltd.
- PMB SAS
- Sichuan Longevous Beamtech Co., Ltd.
- China Institute of Atomic Energy
- ARTMS Inc.
- Comecer S.p.A.

Tema Sinergie S.p.A.

Von Gahlen International B.V.

Trasis S.A.

Eckert & Ziegler Medical GmbH

Kinectrics Inc.

Framatome

NorthStar Medical Radioisotopes, LLC

Key Questions Answered:

1. How big is the global Nuclear Medicine Radioisotope Production Systems market?
2. What is the demand of the global Nuclear Medicine Radioisotope Production Systems market?
3. What is the year over year growth of the global Nuclear Medicine Radioisotope Production Systems market?
4. What is the production and production value of the global Nuclear Medicine Radioisotope Production Systems market?
5. Who are the key producers in the global Nuclear Medicine Radioisotope Production Systems market?
6. What are the growth factors driving the market demand?

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