

Global PSMA-labeled Imaging Ligands Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global PSMA-labeled Imaging Ligands market size is expected to reach \$ 12023 million by 2032, rising at a market growth of 22.8% CAGR during the forecast period (2026-2032).

Prostate-specific membrane antigen (PSMA)-labeled ligands refer to small-molecule compounds that target PSMA and are conjugated with diagnostic radionuclides (primarily Gallium-68 and Fluorine-18) for PET imaging, enabling lesion detection, staging evaluation, and pre-therapeutic patient selection in prostate cancer; they do not deliver therapeutic radiation doses and are classified as radiodiagnostic agents, typically serving as a prerequisite step for PSMA-RLT. The PSMA-labeled ligand market is transitioning from early commercialization to rapid expansion, with a global effective addressable market (EAM) of approximately \$2.846 billion in 2025 (including \$1.679 billion in commercialized market and \$1.0–1.5 billion in convertible in-house demand), corresponding to an annual scan volume of 1.5–2.0 million and a CAGR of 23.3%. Growth is primarily driven by the expansion of F-18 industrialized distribution networks in the U.S. and increasing demand for patient selection alongside broader PSMA-RLT penetration, while the Chinese market remains in an early-stage expansion phase driven by infrastructure build-out.

On the supply side, nominal “capacity” is essentially the combination of radiopharmacy network coverage and hospital nuclear medicine processing capabilities, where the Fluorine-18 system offers superior scalability through centralized cyclotron production and distribution networks, while the Gallium-68 system is constrained by generator availability and in-house operational capacity, resulting in a decentralized supply structure. In terms of pricing, F-18 finished radiopharmaceuticals (represented by Pylarify) are priced at approximately \$3,000–5,000 per dose, while Ga-68 kit-based

usage corresponds to \$1,000–3,000 per dose; the industry overall exhibits high gross margins of 70–85% (with higher margins for kits but smaller revenue pools). Downstream applications are highly concentrated in the prostate cancer diagnostic workflow (initial staging ? recurrence detection ? RLT selection), with demand increasingly shifting toward pre-therapy selection as PSMA-targeted therapies expand. The value chain consists of upstream radionuclide supply (F-18, Ga-68 generators) and ligand synthesis, midstream radiopharmaceutical production and distribution networks (a centralized model led by Lantheus Holdings coexisting with a kit-based model led by Telix Pharmaceuticals), and downstream nuclear medicine departments and imaging centers. The global competitive landscape is characterized by an “F-18 oligopoly + Ga-68 dual-core” structure (industrial distribution dominated by Lantheus Holdings, and kit-based pathways led by Novartis and Telix Pharmaceuticals). The industry is fundamentally in a growth stage where demand has been validated but commercialization penetration remains incomplete, driven by the migration from in-house preparation to industrialized distribution and RLT-driven diagnostic demand, while the key uncertainty lies in logistical delivery radius and nuclear medicine infrastructure constraints on F-18 penetration.

This report studies the global PSMA-labeled Imaging Ligands production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for PSMA-labeled Imaging Ligands 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 PSMA-labeled Imaging Ligands that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global PSMA-labeled Imaging Ligands total production and demand, 2021-2032, (Units)

Global PSMA-labeled Imaging Ligands total production value, 2021-2032, (USD Million)

Global PSMA-labeled Imaging Ligands production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global PSMA-labeled Imaging Ligands consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: PSMA-labeled Imaging Ligands domestic production, consumption, key domestic manufacturers and share

Global PSMA-labeled Imaging Ligands production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global PSMA-labeled Imaging Ligands production by Type, production, value, CAGR,

2021-2032, (USD Million) & (Units)

Global PSMA-labeled Imaging Ligands production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global PSMA-labeled Imaging Ligands 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 Lantheus Holdings, Novartis, Curium, Blue Earth Diagnostics, Bayer, Advanced Biochemical Compounds(ABX), Yantai Dongcheng, China Isotope & Radiation, Grand Pharmaceutical, Telix Pharmaceuticals, 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 PSMA-labeled Imaging Ligands market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, 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 PSMA-labeled Imaging Ligands Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PSMA-labeled Imaging Ligands Market, Segmentation by Type:

Gallium-68?Ga-68?

Fluorine-18?F-18?

Global PSMA-labeled Imaging Ligands Market, Segmentation by Dosage:

Ready-to-use Drug

Kit-based Radiolabeling

Global PSMA-labeled Imaging Ligands Market, Segmentation by Application:

Initial Staging

Biochemical Recurrence

Theranostics Selection

Others

Companies Profiled:

Lantheus Holdings

Novartis

Curium

Blue Earth Diagnostics

Bayer

Advanced Biochemical Compounds(ABX)

Yantai Dongcheng

China Isotope & Radiation

Grand Pharmaceutical

Telix Pharmaceuticals

Key Questions Answered:

1. How big is the global PSMA-labeled Imaging Ligands market?
2. What is the demand of the global PSMA-labeled Imaging Ligands market?
3. What is the year over year growth of the global PSMA-labeled Imaging Ligands market?
4. What is the production and production value of the global PSMA-labeled Imaging Ligands market?
5. Who are the key producers in the global PSMA-labeled Imaging Ligands market?
6. What are the growth factors driving the market demand?

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