

# Global PSMA-labeled Imaging Ligands Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global PSMA-labeled Imaging Ligands market size was valued at US\$ 2928 million in 2025 and is forecast to a readjusted size of US\$ 12023 million by 2032 with a CAGR of 22.8% during review period.

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 is a detailed and comprehensive analysis for global PSMA-labeled Imaging Ligands market. Both quantitative and qualitative analyses are presented by manufacturers, 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 PSMA-labeled Imaging Ligands market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global PSMA-labeled Imaging Ligands market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global PSMA-labeled Imaging Ligands market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling

prices (US\$/Unit), 2021-2032

Global PSMA-labeled Imaging Ligands market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 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 PSMA-labeled Imaging Ligands

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 PSMA-labeled Imaging Ligands market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

PSMA-labeled Imaging Ligands 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 in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Gallium-68?Ga-68?

Fluorine-18?F-18?

Market segment by Dosage

Ready-to-use Drug

Kit-based Radiolabeling

Market segment by Application

Initial Staging

Biochemical Recurrence

Theranostics Selection

Others

Major players covered

Lantheus Holdings

Novartis

Curium

Blue Earth Diagnostics

Bayer

Advanced Biochemical Compounds(ABX)

Yantai Dongcheng

China Isotope & Radiation

Grand Pharmaceutical

Telix Pharmaceuticals

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe PSMA-labeled Imaging Ligands product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of PSMA-labeled Imaging Ligands, with price, sales quantity, revenue, and global market share of PSMA-labeled Imaging Ligands from 2021 to 2026.

Chapter 3, the PSMA-labeled Imaging Ligands competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the PSMA-labeled Imaging Ligands breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and PSMA-labeled Imaging Ligands market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of PSMA-labeled Imaging Ligands.

Chapter 14 and 15, to describe PSMA-labeled Imaging Ligands sales channel, distributors, customers, research findings and conclusion.

## Contents

### 1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global PSMA-labeled Imaging Ligands Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Gallium-68?Ga-68?

1.3.3 Fluorine-18?F-18?

1.4 Market Analysis by Dosage

1.4.1 Overview: Global PSMA-labeled Imaging Ligands Consumption Value by Dosage: 2021 Versus 2025 Versus 2032

1.4.2 Ready-to-use Drug

1.4.3 Kit-based Radiolabeling

1.5 Market Analysis by Application

1.5.1 Overview: Global PSMA-labeled Imaging Ligands Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.5.2 Initial Staging

1.5.3 Biochemical Recurrence

1.5.4 Theranostics Selection

1.5.5 Others

1.6 Global PSMA-labeled Imaging Ligands Market Size & Forecast

1.6.1 Global PSMA-labeled Imaging Ligands Consumption Value (2021 & 2025 & 2032)

1.6.2 Global PSMA-labeled Imaging Ligands Sales Quantity (2021-2032)

1.6.3 Global PSMA-labeled Imaging Ligands Average Price (2021-2032)

### 2 MANUFACTURERS PROFILES

2.1 Lantheus Holdings

2.1.1 Lantheus Holdings Details

2.1.2 Lantheus Holdings Major Business

2.1.3 Lantheus Holdings PSMA-labeled Imaging Ligands Product and Services

2.1.4 Lantheus Holdings PSMA-labeled Imaging Ligands Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Lantheus Holdings Recent Developments/Updates

2.2 Novartis

- 2.2.1 Novartis Details
- 2.2.2 Novartis Major Business
- 2.2.3 Novartis PSMA-labeled Imaging Ligands Product and Services
- 2.2.4 Novartis PSMA-labeled Imaging Ligands Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.2.5 Novartis Recent Developments/Updates
- 2.3 Curium
  - 2.3.1 Curium Details
  - 2.3.2 Curium Major Business
  - 2.3.3 Curium PSMA-labeled Imaging Ligands Product and Services
  - 2.3.4 Curium PSMA-labeled Imaging Ligands Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.3.5 Curium Recent Developments/Updates
- 2.4 Blue Earth Diagnostics
  - 2.4.1 Blue Earth Diagnostics Details
  - 2.4.2 Blue Earth Diagnostics Major Business
  - 2.4.3 Blue Earth Diagnostics PSMA-labeled Imaging Ligands Product and Services
  - 2.4.4 Blue Earth Diagnostics PSMA-labeled Imaging Ligands Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.4.5 Blue Earth Diagnostics Recent Developments/Updates
- 2.5 Bayer
  - 2.5.1 Bayer Details
  - 2.5.2 Bayer Major Business
  - 2.5.3 Bayer PSMA-labeled Imaging Ligands Product and Services
  - 2.5.4 Bayer PSMA-labeled Imaging Ligands Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.5.5 Bayer Recent Developments/Updates
- 2.6 Advanced Biochemical Compounds(ABX)
  - 2.6.1 Advanced Biochemical Compounds(ABX) Details
  - 2.6.2 Advanced Biochemical Compounds(ABX) Major Business
  - 2.6.3 Advanced Biochemical Compounds(ABX) PSMA-labeled Imaging Ligands Product and Services
  - 2.6.4 Advanced Biochemical Compounds(ABX) PSMA-labeled Imaging Ligands Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.6.5 Advanced Biochemical Compounds(ABX) Recent Developments/Updates
- 2.7 Yantai Dongcheng
  - 2.7.1 Yantai Dongcheng Details
  - 2.7.2 Yantai Dongcheng Major Business
  - 2.7.3 Yantai Dongcheng PSMA-labeled Imaging Ligands Product and Services

- 2.7.4 Yantai Dongcheng PSMA-labeled Imaging Ligands Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.7.5 Yantai Dongcheng Recent Developments/Updates
- 2.8 China Isotope & Radiation
  - 2.8.1 China Isotope & Radiation Details
  - 2.8.2 China Isotope & Radiation Major Business
  - 2.8.3 China Isotope & Radiation PSMA-labeled Imaging Ligands Product and Services
  - 2.8.4 China Isotope & Radiation PSMA-labeled Imaging Ligands Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.8.5 China Isotope & Radiation Recent Developments/Updates
- 2.9 Grand Pharmaceutical
  - 2.9.1 Grand Pharmaceutical Details
  - 2.9.2 Grand Pharmaceutical Major Business
  - 2.9.3 Grand Pharmaceutical PSMA-labeled Imaging Ligands Product and Services
  - 2.9.4 Grand Pharmaceutical PSMA-labeled Imaging Ligands Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.9.5 Grand Pharmaceutical Recent Developments/Updates
- 2.10 Telix Pharmaceuticals
  - 2.10.1 Telix Pharmaceuticals Details
  - 2.10.2 Telix Pharmaceuticals Major Business
  - 2.10.3 Telix Pharmaceuticals PSMA-labeled Imaging Ligands Product and Services
  - 2.10.4 Telix Pharmaceuticals PSMA-labeled Imaging Ligands Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.10.5 Telix Pharmaceuticals Recent Developments/Updates

### **3 COMPETITIVE ENVIRONMENT: PSMA-LABELED IMAGING LIGANDS BY MANUFACTURER**

- 3.1 Global PSMA-labeled Imaging Ligands Sales Quantity by Manufacturer (2021-2026)
- 3.2 Global PSMA-labeled Imaging Ligands Revenue by Manufacturer (2021-2026)
- 3.3 Global PSMA-labeled Imaging Ligands Average Price by Manufacturer (2021-2026)
- 3.4 Market Share Analysis (2025)
  - 3.4.1 Producer Shipments of PSMA-labeled Imaging Ligands by Manufacturer Revenue (\$MM) and Market Share (%): 2025
  - 3.4.2 Top 3 PSMA-labeled Imaging Ligands Manufacturer Market Share in 2025
  - 3.4.3 Top 6 PSMA-labeled Imaging Ligands Manufacturer Market Share in 2025
- 3.5 PSMA-labeled Imaging Ligands Market: Overall Company Footprint Analysis
  - 3.5.1 PSMA-labeled Imaging Ligands Market: Region Footprint
  - 3.5.2 PSMA-labeled Imaging Ligands Market: Company Product Type Footprint

- 3.5.3 PSMA-labeled Imaging Ligands Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

## **4 CONSUMPTION ANALYSIS BY REGION**

- 4.1 Global PSMA-labeled Imaging Ligands Market Size by Region
  - 4.1.1 Global PSMA-labeled Imaging Ligands Sales Quantity by Region (2021-2032)
  - 4.1.2 Global PSMA-labeled Imaging Ligands Consumption Value by Region (2021-2032)
  - 4.1.3 Global PSMA-labeled Imaging Ligands Average Price by Region (2021-2032)
- 4.2 North America PSMA-labeled Imaging Ligands Consumption Value (2021-2032)
- 4.3 Europe PSMA-labeled Imaging Ligands Consumption Value (2021-2032)
- 4.4 Asia-Pacific PSMA-labeled Imaging Ligands Consumption Value (2021-2032)
- 4.5 South America PSMA-labeled Imaging Ligands Consumption Value (2021-2032)
- 4.6 Middle East & Africa PSMA-labeled Imaging Ligands Consumption Value (2021-2032)

## **5 MARKET SEGMENT BY TYPE**

- 5.1 Global PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2032)
- 5.2 Global PSMA-labeled Imaging Ligands Consumption Value by Type (2021-2032)
- 5.3 Global PSMA-labeled Imaging Ligands Average Price by Type (2021-2032)

## **6 MARKET SEGMENT BY APPLICATION**

- 6.1 Global PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2032)
- 6.2 Global PSMA-labeled Imaging Ligands Consumption Value by Application (2021-2032)
- 6.3 Global PSMA-labeled Imaging Ligands Average Price by Application (2021-2032)

## **7 NORTH AMERICA**

- 7.1 North America PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2032)
- 7.2 North America PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2032)
- 7.3 North America PSMA-labeled Imaging Ligands Market Size by Country
  - 7.3.1 North America PSMA-labeled Imaging Ligands Sales Quantity by Country (2021-2032)

7.3.2 North America PSMA-labeled Imaging Ligands Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

## **8 EUROPE**

8.1 Europe PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2032)

8.2 Europe PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2032)

8.3 Europe PSMA-labeled Imaging Ligands Market Size by Country

8.3.1 Europe PSMA-labeled Imaging Ligands Sales Quantity by Country (2021-2032)

8.3.2 Europe PSMA-labeled Imaging Ligands Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

## **9 ASIA-PACIFIC**

9.1 Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific PSMA-labeled Imaging Ligands Market Size by Region

9.3.1 Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific PSMA-labeled Imaging Ligands Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

## **10 SOUTH AMERICA**

- 10.1 South America PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2032)
- 10.2 South America PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2032)
- 10.3 South America PSMA-labeled Imaging Ligands Market Size by Country
  - 10.3.1 South America PSMA-labeled Imaging Ligands Sales Quantity by Country (2021-2032)
  - 10.3.2 South America PSMA-labeled Imaging Ligands Consumption Value by Country (2021-2032)
  - 10.3.3 Brazil Market Size and Forecast (2021-2032)
  - 10.3.4 Argentina Market Size and Forecast (2021-2032)

## **11 MIDDLE EAST & AFRICA**

- 11.1 Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2032)
- 11.2 Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2032)
- 11.3 Middle East & Africa PSMA-labeled Imaging Ligands Market Size by Country
  - 11.3.1 Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity by Country (2021-2032)
  - 11.3.2 Middle East & Africa PSMA-labeled Imaging Ligands Consumption Value by Country (2021-2032)
  - 11.3.3 Turkey Market Size and Forecast (2021-2032)
  - 11.3.4 Egypt Market Size and Forecast (2021-2032)
  - 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
  - 11.3.6 South Africa Market Size and Forecast (2021-2032)

## **12 MARKET DYNAMICS**

- 12.1 PSMA-labeled Imaging Ligands Market Drivers
- 12.2 PSMA-labeled Imaging Ligands Market Restraints
- 12.3 PSMA-labeled Imaging Ligands Trends Analysis
- 12.4 Porters Five Forces Analysis
  - 12.4.1 Threat of New Entrants
  - 12.4.2 Bargaining Power of Suppliers
  - 12.4.3 Bargaining Power of Buyers
  - 12.4.4 Threat of Substitutes
  - 12.4.5 Competitive Rivalry

## **13 RAW MATERIAL AND INDUSTRY CHAIN**

13.1 Raw Material of PSMA-labeled Imaging Ligands and Key Manufacturers

13.2 Manufacturing Costs Percentage of PSMA-labeled Imaging Ligands

13.3 PSMA-labeled Imaging Ligands Production Process

13.4 Industry Value Chain Analysis

## **14 SHIPMENTS BY DISTRIBUTION CHANNEL**

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 PSMA-labeled Imaging Ligands Typical Distributors

14.3 PSMA-labeled Imaging Ligands Typical Customers

## **15 RESEARCH FINDINGS AND CONCLUSION**

## **16 APPENDIX**

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. Global PSMA-labeled Imaging Ligands Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global PSMA-labeled Imaging Ligands Consumption Value by Dosage, (USD Million), 2021 & 2025 & 2032

Table 3. Global PSMA-labeled Imaging Ligands Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 4. Lantheus Holdings Basic Information, Manufacturing Base and Competitors

Table 5. Lantheus Holdings Major Business

Table 6. Lantheus Holdings PSMA-labeled Imaging Ligands Product and Services

Table 7. Lantheus Holdings PSMA-labeled Imaging Ligands Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 8. Lantheus Holdings Recent Developments/Updates

Table 9. Novartis Basic Information, Manufacturing Base and Competitors

Table 10. Novartis Major Business

Table 11. Novartis PSMA-labeled Imaging Ligands Product and Services

Table 12. Novartis PSMA-labeled Imaging Ligands Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 13. Novartis Recent Developments/Updates

Table 14. Curium Basic Information, Manufacturing Base and Competitors

Table 15. Curium Major Business

Table 16. Curium PSMA-labeled Imaging Ligands Product and Services

Table 17. Curium PSMA-labeled Imaging Ligands Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 18. Curium Recent Developments/Updates

Table 19. Blue Earth Diagnostics Basic Information, Manufacturing Base and Competitors

Table 20. Blue Earth Diagnostics Major Business

Table 21. Blue Earth Diagnostics PSMA-labeled Imaging Ligands Product and Services

Table 22. Blue Earth Diagnostics PSMA-labeled Imaging Ligands Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 23. Blue Earth Diagnostics Recent Developments/Updates

Table 24. Bayer Basic Information, Manufacturing Base and Competitors

Table 25. Bayer Major Business

- Table 26. Bayer PSMA-labeled Imaging Ligands Product and Services
- Table 27. Bayer PSMA-labeled Imaging Ligands Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 28. Bayer Recent Developments/Updates
- Table 29. Advanced Biochemical Compounds(ABX) Basic Information, Manufacturing Base and Competitors
- Table 30. Advanced Biochemical Compounds(ABX) Major Business
- Table 31. Advanced Biochemical Compounds(ABX) PSMA-labeled Imaging Ligands Product and Services
- Table 32. Advanced Biochemical Compounds(ABX) PSMA-labeled Imaging Ligands Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 33. Advanced Biochemical Compounds(ABX) Recent Developments/Updates
- Table 34. Yantai Dongcheng Basic Information, Manufacturing Base and Competitors
- Table 35. Yantai Dongcheng Major Business
- Table 36. Yantai Dongcheng PSMA-labeled Imaging Ligands Product and Services
- Table 37. Yantai Dongcheng PSMA-labeled Imaging Ligands Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 38. Yantai Dongcheng Recent Developments/Updates
- Table 39. China Isotope & Radiation Basic Information, Manufacturing Base and Competitors
- Table 40. China Isotope & Radiation Major Business
- Table 41. China Isotope & Radiation PSMA-labeled Imaging Ligands Product and Services
- Table 42. China Isotope & Radiation PSMA-labeled Imaging Ligands Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 43. China Isotope & Radiation Recent Developments/Updates
- Table 44. Grand Pharmaceutical Basic Information, Manufacturing Base and Competitors
- Table 45. Grand Pharmaceutical Major Business
- Table 46. Grand Pharmaceutical PSMA-labeled Imaging Ligands Product and Services
- Table 47. Grand Pharmaceutical PSMA-labeled Imaging Ligands Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 48. Grand Pharmaceutical Recent Developments/Updates
- Table 49. Telix Pharmaceuticals Basic Information, Manufacturing Base and Competitors

Table 50. Telix Pharmaceuticals Major Business

Table 51. Telix Pharmaceuticals PSMA-labeled Imaging Ligands Product and Services

Table 52. Telix Pharmaceuticals PSMA-labeled Imaging Ligands Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 53. Telix Pharmaceuticals Recent Developments/Updates

Table 54. Global PSMA-labeled Imaging Ligands Sales Quantity by Manufacturer (2021-2026) & (Units)

Table 55. Global PSMA-labeled Imaging Ligands Revenue by Manufacturer (2021-2026) & (USD Million)

Table 56. Global PSMA-labeled Imaging Ligands Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 57. Market Position of Manufacturers in PSMA-labeled Imaging Ligands, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 58. Head Office and PSMA-labeled Imaging Ligands Production Site of Key Manufacturer

Table 59. PSMA-labeled Imaging Ligands Market: Company Product Type Footprint

Table 60. PSMA-labeled Imaging Ligands Market: Company Product Application Footprint

Table 61. PSMA-labeled Imaging Ligands New Market Entrants and Barriers to Market Entry

Table 62. PSMA-labeled Imaging Ligands Mergers, Acquisition, Agreements, and Collaborations

Table 63. Global PSMA-labeled Imaging Ligands Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 64. Global PSMA-labeled Imaging Ligands Sales Quantity by Region (2021-2026) & (Units)

Table 65. Global PSMA-labeled Imaging Ligands Sales Quantity by Region (2027-2032) & (Units)

Table 66. Global PSMA-labeled Imaging Ligands Consumption Value by Region (2021-2026) & (USD Million)

Table 67. Global PSMA-labeled Imaging Ligands Consumption Value by Region (2027-2032) & (USD Million)

Table 68. Global PSMA-labeled Imaging Ligands Average Price by Region (2021-2026) & (US\$/Unit)

Table 69. Global PSMA-labeled Imaging Ligands Average Price by Region (2027-2032) & (US\$/Unit)

Table 70. Global PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2026) & (Units)

Table 71. Global PSMA-labeled Imaging Ligands Sales Quantity by Type (2027-2032) & (Units)

Table 72. Global PSMA-labeled Imaging Ligands Consumption Value by Type (2021-2026) & (USD Million)

Table 73. Global PSMA-labeled Imaging Ligands Consumption Value by Type (2027-2032) & (USD Million)

Table 74. Global PSMA-labeled Imaging Ligands Average Price by Type (2021-2026) & (US\$/Unit)

Table 75. Global PSMA-labeled Imaging Ligands Average Price by Type (2027-2032) & (US\$/Unit)

Table 76. Global PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2026) & (Units)

Table 77. Global PSMA-labeled Imaging Ligands Sales Quantity by Application (2027-2032) & (Units)

Table 78. Global PSMA-labeled Imaging Ligands Consumption Value by Application (2021-2026) & (USD Million)

Table 79. Global PSMA-labeled Imaging Ligands Consumption Value by Application (2027-2032) & (USD Million)

Table 80. Global PSMA-labeled Imaging Ligands Average Price by Application (2021-2026) & (US\$/Unit)

Table 81. Global PSMA-labeled Imaging Ligands Average Price by Application (2027-2032) & (US\$/Unit)

Table 82. North America PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2026) & (Units)

Table 83. North America PSMA-labeled Imaging Ligands Sales Quantity by Type (2027-2032) & (Units)

Table 84. North America PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2026) & (Units)

Table 85. North America PSMA-labeled Imaging Ligands Sales Quantity by Application (2027-2032) & (Units)

Table 86. North America PSMA-labeled Imaging Ligands Sales Quantity by Country (2021-2026) & (Units)

Table 87. North America PSMA-labeled Imaging Ligands Sales Quantity by Country (2027-2032) & (Units)

Table 88. North America PSMA-labeled Imaging Ligands Consumption Value by Country (2021-2026) & (USD Million)

Table 89. North America PSMA-labeled Imaging Ligands Consumption Value by Country (2027-2032) & (USD Million)

Table 90. Europe PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2026)

& (Units)

Table 91. Europe PSMA-labeled Imaging Ligands Sales Quantity by Type (2027-2032)

& (Units)

Table 92. Europe PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2026) & (Units)

Table 93. Europe PSMA-labeled Imaging Ligands Sales Quantity by Application (2027-2032) & (Units)

Table 94. Europe PSMA-labeled Imaging Ligands Sales Quantity by Country (2021-2026) & (Units)

Table 95. Europe PSMA-labeled Imaging Ligands Sales Quantity by Country (2027-2032) & (Units)

Table 96. Europe PSMA-labeled Imaging Ligands Consumption Value by Country (2021-2026) & (USD Million)

Table 97. Europe PSMA-labeled Imaging Ligands Consumption Value by Country (2027-2032) & (USD Million)

Table 98. Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2026) & (Units)

Table 99. Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity by Type (2027-2032) & (Units)

Table 100. Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2026) & (Units)

Table 101. Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity by Application (2027-2032) & (Units)

Table 102. Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity by Region (2021-2026) & (Units)

Table 103. Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity by Region (2027-2032) & (Units)

Table 104. Asia-Pacific PSMA-labeled Imaging Ligands Consumption Value by Region (2021-2026) & (USD Million)

Table 105. Asia-Pacific PSMA-labeled Imaging Ligands Consumption Value by Region (2027-2032) & (USD Million)

Table 106. South America PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2026) & (Units)

Table 107. South America PSMA-labeled Imaging Ligands Sales Quantity by Type (2027-2032) & (Units)

Table 108. South America PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2026) & (Units)

Table 109. South America PSMA-labeled Imaging Ligands Sales Quantity by Application (2027-2032) & (Units)

Table 110. South America PSMA-labeled Imaging Ligands Sales Quantity by Country (2021-2026) & (Units)

Table 111. South America PSMA-labeled Imaging Ligands Sales Quantity by Country (2027-2032) & (Units)

Table 112. South America PSMA-labeled Imaging Ligands Consumption Value by Country (2021-2026) & (USD Million)

Table 113. South America PSMA-labeled Imaging Ligands Consumption Value by Country (2027-2032) & (USD Million)

Table 114. Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity by Type (2021-2026) & (Units)

Table 115. Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity by Type (2027-2032) & (Units)

Table 116. Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity by Application (2021-2026) & (Units)

Table 117. Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity by Application (2027-2032) & (Units)

Table 118. Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity by Country (2021-2026) & (Units)

Table 119. Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity by Country (2027-2032) & (Units)

Table 120. Middle East & Africa PSMA-labeled Imaging Ligands Consumption Value by Country (2021-2026) & (USD Million)

Table 121. Middle East & Africa PSMA-labeled Imaging Ligands Consumption Value by Country (2027-2032) & (USD Million)

Table 122. PSMA-labeled Imaging Ligands Raw Material

Table 123. Key Manufacturers of PSMA-labeled Imaging Ligands Raw Materials

Table 124. PSMA-labeled Imaging Ligands Typical Distributors

Table 125. PSMA-labeled Imaging Ligands Typical Customers

## List Of Figures

### LIST OF FIGURES

Figure 1. PSMA-labeled Imaging Ligands Picture

Figure 2. Global PSMA-labeled Imaging Ligands Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global PSMA-labeled Imaging Ligands Revenue Market Share by Type in 2025

Figure 4. Gallium-68?Ga-68? Examples

Figure 5. Fluorine-18?F-18? Examples

Figure 6. Global PSMA-labeled Imaging Ligands Revenue by Dosage, (USD Million), 2021 & 2025 & 2032

Figure 7. Global PSMA-labeled Imaging Ligands Revenue Market Share by Dosage in 2025

Figure 8. Ready-to-use Drug Examples

Figure 9. Kit-based Radiolabeling Examples

Figure 10. Global PSMA-labeled Imaging Ligands Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 11. Global PSMA-labeled Imaging Ligands Revenue Market Share by Application in 2025

Figure 12. Initial Staging Examples

Figure 13. Biochemical Recurrence Examples

Figure 14. Theranostics Selection Examples

Figure 15. Others Examples

Figure 16. Global PSMA-labeled Imaging Ligands Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 17. Global PSMA-labeled Imaging Ligands Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 18. Global PSMA-labeled Imaging Ligands Sales Quantity (2021-2032) & (Units)

Figure 19. Global PSMA-labeled Imaging Ligands Price (2021-2032) & (US\$/Unit)

Figure 20. Global PSMA-labeled Imaging Ligands Sales Quantity Market Share by Manufacturer in 2025

Figure 21. Global PSMA-labeled Imaging Ligands Revenue Market Share by Manufacturer in 2025

Figure 22. Producer Shipments of PSMA-labeled Imaging Ligands by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 23. Top 3 PSMA-labeled Imaging Ligands Manufacturer (Revenue) Market Share in 2025

Figure 24. Top 6 PSMA-labeled Imaging Ligands Manufacturer (Revenue) Market Share in 2025

Figure 25. Global PSMA-labeled Imaging Ligands Sales Quantity Market Share by Region (2021-2032)

Figure 26. Global PSMA-labeled Imaging Ligands Consumption Value Market Share by Region (2021-2032)

Figure 27. North America PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 28. Europe PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 29. Asia-Pacific PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 30. South America PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 31. Middle East & Africa PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 32. Global PSMA-labeled Imaging Ligands Sales Quantity Market Share by Type (2021-2032)

Figure 33. Global PSMA-labeled Imaging Ligands Consumption Value Market Share by Type (2021-2032)

Figure 34. Global PSMA-labeled Imaging Ligands Average Price by Type (2021-2032) & (US\$/Unit)

Figure 35. Global PSMA-labeled Imaging Ligands Sales Quantity Market Share by Application (2021-2032)

Figure 36. Global PSMA-labeled Imaging Ligands Revenue Market Share by Application (2021-2032)

Figure 37. Global PSMA-labeled Imaging Ligands Average Price by Application (2021-2032) & (US\$/Unit)

Figure 38. North America PSMA-labeled Imaging Ligands Sales Quantity Market Share by Type (2021-2032)

Figure 39. North America PSMA-labeled Imaging Ligands Sales Quantity Market Share by Application (2021-2032)

Figure 40. North America PSMA-labeled Imaging Ligands Sales Quantity Market Share by Country (2021-2032)

Figure 41. North America PSMA-labeled Imaging Ligands Consumption Value Market Share by Country (2021-2032)

Figure 42. United States PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 43. Canada PSMA-labeled Imaging Ligands Consumption Value (2021-2032) &

(USD Million)

Figure 44. Mexico PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 45. Europe PSMA-labeled Imaging Ligands Sales Quantity Market Share by Type (2021-2032)

Figure 46. Europe PSMA-labeled Imaging Ligands Sales Quantity Market Share by Application (2021-2032)

Figure 47. Europe PSMA-labeled Imaging Ligands Sales Quantity Market Share by Country (2021-2032)

Figure 48. Europe PSMA-labeled Imaging Ligands Consumption Value Market Share by Country (2021-2032)

Figure 49. Germany PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 50. France PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 51. United Kingdom PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 52. Russia PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 53. Italy PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 54. Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity Market Share by Type (2021-2032)

Figure 55. Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity Market Share by Application (2021-2032)

Figure 56. Asia-Pacific PSMA-labeled Imaging Ligands Sales Quantity Market Share by Region (2021-2032)

Figure 57. Asia-Pacific PSMA-labeled Imaging Ligands Consumption Value Market Share by Region (2021-2032)

Figure 58. China PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 59. Japan PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 60. South Korea PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 61. India PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 62. Southeast Asia PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 63. Australia PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 64. South America PSMA-labeled Imaging Ligands Sales Quantity Market Share by Type (2021-2032)

Figure 65. South America PSMA-labeled Imaging Ligands Sales Quantity Market Share by Application (2021-2032)

Figure 66. South America PSMA-labeled Imaging Ligands Sales Quantity Market Share by Country (2021-2032)

Figure 67. South America PSMA-labeled Imaging Ligands Consumption Value Market Share by Country (2021-2032)

Figure 68. Brazil PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 69. Argentina PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 70. Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity Market Share by Type (2021-2032)

Figure 71. Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity Market Share by Application (2021-2032)

Figure 72. Middle East & Africa PSMA-labeled Imaging Ligands Sales Quantity Market Share by Country (2021-2032)

Figure 73. Middle East & Africa PSMA-labeled Imaging Ligands Consumption Value Market Share by Country (2021-2032)

Figure 74. Turkey PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 75. Egypt PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 76. Saudi Arabia PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 77. South Africa PSMA-labeled Imaging Ligands Consumption Value (2021-2032) & (USD Million)

Figure 78. PSMA-labeled Imaging Ligands Market Drivers

Figure 79. PSMA-labeled Imaging Ligands Market Restraints

Figure 80. PSMA-labeled Imaging Ligands Market Trends

Figure 81. Porters Five Forces Analysis

Figure 82. Manufacturing Cost Structure Analysis of PSMA-labeled Imaging Ligands in 2025

Figure 83. Manufacturing Process Analysis of PSMA-labeled Imaging Ligands

Figure 84. PSMA-labeled Imaging Ligands Industrial Chain

Figure 85. Sales Channel: Direct to End-User vs Distributors

Figure 86. Direct Channel Pros & Cons

Figure 87. Indirect Channel Pros & Cons

Figure 88. Methodology

Figure 89. Research Process and Data Source

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