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Global Samarium-149 Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Samarium-149 market size is expected to reach $ million by 2032, rising at a market growth of %CAGR during the forecast period (2026-2032).

In 2025, global Samarium-149 production was approximately 380 grams, with an average global market price of around $4,900 per gram. That year, total global production capacity for Samarium-149 reached approximately 600 grams, and the industry's average gross profit margin stood at about 34%. Samarium-149 is a naturally occurring stable isotope of the element samarium, characterized by an atomic number of 62 and a mass number of 149; its nucleus consists of 62 protons and 87 neutrons, and it accounts for approximately 13.82% of the atomic abundance of natural samarium. Its most notable characteristic is an exceptionally high thermal neutron absorption capacity: for thermal neutrons traveling at 2,200 m/s, the absorption cross-section is approximately 42,080 barns, and upon neutron absorption, it primarily transforms into stable samarium-150. Consequently, samarium-149 serves as both a significant neutron-absorbing nuclide and a classic "fission-product poison" in nuclear reactors.

Upstream operations primarily encompass rare-earth ore mining, natural samarium separation, the preparation of high-purity samarium compounds, and stable isotope separation. Samarium is mainly derived from monazite, bastnäsite, xenotime, and ion-adsorption rare-earth ores; through processes such as crushing, leaching, solvent extraction, and ion exchange, these ores are converted into samarium oxide, samarium chloride, or other high-purity samarium feedstocks. Since standard chemical methods cannot separate samarium-149 from other samarium isotopes, the production of enriched samarium-149 requires isotope separation technologies based on mass differences, such as electromagnetic separation. The core upstream resources are not natural samarium itself, but rather high-purity feedstocks, isotope separation facilities,

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specialized ion sources, and high-precision isotope detection capabilities. Midstream activities include isotope enrichment, chemical purification, chemical form conversion, target fabrication, and quality inspection. Following physical isotope separation, samarium-149 can be obtained at various enrichment levels and subsequently processed—depending on the intended application—into forms such as metal powder, samarium oxide, chlorides, nitrates, pressed pellets, or thin-film targets. Product quality is primarily evaluated based on isotope abundance, chemical purity, impurity element content, and target thickness and uniformity. The U.S. National Isotope Development Center offers enriched Samarium-149 with enrichment levels ranging from approximately 81% to 97%; it is primarily quoted on a milligram scale and can be processed into elemental or oxide targets for scientific research, characterizing it as a low-volume, high-value-added stable isotope product. Downstream applications primarily encompass nuclear reactor physics, nuclear data measurement, neutron science, and research into specialized neutron-absorbing materials. Within nuclear reactors, Samarium-149 is generated through the successive beta decay of the fission product Neodymium-149 (via Promethium-149); it continuously absorbs neutrons, significantly influencing calculations regarding core reactivity and fuel burnup. However, this reactor-generated Samarium-149 typically remains within the nuclear fuel and does not enter the commercial supply market. Externally supplied enriched Samarium-149 is primarily used for measuring neutron capture cross-sections and resonance parameters, validating reactor physics models, preparing targets for nuclear reaction experiments, and developing high-efficiency neutron-absorbing materials. It should be noted that while natural samarium compounds suffice for standard samarium-based absorbers, enriched Samarium-149 is employed only when there are specific requirements regarding absorption efficiency, material volume, or the precision of nuclear data.

The primary driver for the development of the Samarium-149 (Sm-149) industry stems from nuclear science research and reactor physics experiments. Possessing an extremely high thermal neutron absorption cross-section, Sm-149 is a significant neutron poison produced during nuclear fuel fission; its generation and depletion affect reactor reactivity, burnup calculations, and post-shutdown power variations. Consequently, activities such as nuclear data measurement, validation of reactor neutronics models, nuclear fuel burnup analysis, and criticality safety studies generate a persistent demand for small quantities of high-purity enriched Sm-149. It should be noted, however, that standard reactor neutron-absorbing materials typically utilize natural samarium or samarium compounds; thus, growth in installed nuclear power capacity does not translate proportionally into demand for enriched Sm-149.

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Neutron science facilities and fundamental physics research constitute another key driver. Enriched Sm-149 is utilized for thermal neutron filtering, neutron absorption within specific energy ranges, detector calibration, nuclear reaction cross-section measurements, and as target material for neutron beam experiments. With the construction of research reactors, spallation neutron sources, and advanced nuclear physics experimental platforms, user demand is shifting from standard enriched oxides toward products requiring high enrichment levels and high chemical purity—specifically custom-sized target foils, deposited layers, and pressed targets.

Developments on the supply side are primarily driven by isotope separation capabilities and inventory management systems. As the chemical properties of samarium's various stable isotopes are nearly identical, Sm-149 enrichment relies on technologies such as electromagnetic isotope separation. These processes entail high costs regarding equipment investment, energy consumption, purification, and quality control, limiting the number of institutions worldwide capable of ensuring a stable supply. Future industry efforts will focus on utilizing existing enriched isotope inventories, recovering and repurifying spent targets, managing batch consistency, and ensuring supply chain security, while simultaneously reducing unit costs through improved separation efficiency and post-processing techniques.

Report Scope

This report studies the global Samarium-149 production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Samarium-149 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 Samarium-149 that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Samarium-149 total production and demand, 2021-2032, (Gram)

Global Samarium-149 total production value, 2021-2032, (USD Million)

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Global Samarium-149 production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Gram), (based on production site)

Global Samarium-149 consumption by region & country, CAGR, 2021-2032 & (Gram)

U.S. VS China: Samarium-149 domestic production, consumption, key domestic manufacturers and share

Global Samarium-149 production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Gram)

Global Samarium-149 production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Gram)

Global Samarium-149 production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Gram)

This report profiles key players in the global Samarium-149 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 Rosatom, ORNL, Neonest AB(BuyIsotope), CortecNet, Trace Sciences International, Edgetech Industries, American Elements, LEAP CHEM CO., LTD, ATT Advanced Elemental, Xinglu Chemical, 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 Samarium-149 market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Gram) and average price (US$/g) 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

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forecast year.

Global Samarium-149 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Samarium-149 Market, Segmentation by Type:

Reactor Irradiation Production

Accelerator Synthesis

Others

Global Samarium-149 Market, Segmentation by Isotopic Abundance:

Standard Enrichment (80%–90%)

High Enrichment (>90%–95%)

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Ultra-high Enrichment (>95%)

Global Samarium-149 Market, Segmentation by Product Form:

Samarium-149 Oxide

Samarium-149 Metal

Samarium-149 Solution

Samarium-149 Target Material

Global Samarium-149 Market, Segmentation by Chemical Purity:

3N

4N

5N

Others

Global Samarium-149 Market, Segmentation by Application:

Nuclear Medicine

Scientific Research

Companies Profiled:

Rosatom

ORNL

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Neonest AB(BuyIsotope)

CortecNet

Trace Sciences International

Edgetech Industries

American Elements

LEAP CHEM CO., LTD

ATT Advanced Elemental

Xinglu Chemical

Epoch material

Key Questions Answered

1. How big is the global Samarium-149 market?
2. What is the demand of the global Samarium-149 market?
3. What is the year over year growth of the global Samarium-149 market?
4. What is the total value of the global Samarium-149 market?
5. Who are the Major Players in the global Samarium-149 market?
6. What are the growth factors driving the market demand?

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