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# Global Technetium-99m Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Technetium-99m market size is expected to reach $ 799 million by 2032, rising at a market growth of 4.5% CAGR during the forecast period (2026-2032).
Technetium-99m is a nuclear isomer of technetium-99 and the most widely used radiopharmaceutical in diagnostic nuclear medicine. The 'm' stands for metastable, indicating that the nucleus remains in an excited state for a measurable period before decaying. It is typically generated from the decay of Molybdenum-99 in a technetium generator. With a physical half-life of approximately 6.02 hours, Tc99 decays by emitting a gamma photon with a principal energy of 140 keV, which is ideal for detection by gamma cameras and Single-Photon Emission Computed Tomography (SPECT). Its optimal energy profile, short half-life (which minimizes patient radiation exposure), and versatile chemistry for labeling various biological compounds make it the 'gold standard' for imaging the skeleton, heart, and various internal organs.In 2025, global Technetium-99m production reached approximately 546.98 K Curie.
Technetium-99m (Tc-99m) is the most widely used and strategically important radionuclide in the global nuclear medicine diagnostics market, often regarded as the cornerstone of modern medical imaging. Owing to its favorable physical characteristics?such as a short half-life of approximately six hours, an optimal gamma emission energy of 140 keV, and relatively low radiation exposure to patients?Tc-99m is extensively used in single-photon emission computed tomography (SPECT). It plays a dominant role in diagnostic imaging for cardiology, orthopedics, oncology, nephrology, pulmonology, and thyroid disorders. Globally, Tc-99m-based procedures consistently account for more than 70% of all nuclear medicine diagnostic examinations, underscoring its entrenched and resilient market position.
From a supply perspective, Technetium-99m is not produced directly but is obtained through the radioactive decay of its parent isotope, Molybdenum-99 (Mo-99), and distributed primarily via Tc-99m generators. This supply structure results in a highly

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centralized and sensitive upstream market. Historically, global Mo-99 production has relied on a limited number of aging research reactors, making the Tc-99m supply chain vulnerable to maintenance shutdowns, operational disruptions, and geopolitical risks. As a result, supply security has become a critical issue for healthcare systems worldwide, driving investment into alternative production methods, including low-enriched uranium (LEU)-based reactors, accelerator-based technologies, and regionalized isotope manufacturing initiatives.

On the demand side, the market for Tc-99m is closely linked to demographic and epidemiological trends, particularly population aging and the rising prevalence of chronic diseases. Cardiovascular diseases, bone disorders, and cancer screening increasingly rely on nuclear imaging for early detection and functional assessment, reinforcing Tc-99m?s role as a ?workhorse? isotope in routine diagnostics. In emerging economies and developing regions, SPECT systems combined with Tc-99m radiopharmaceuticals offer a cost-effective and scalable solution compared to PET imaging, which requires higher capital investment and more complex infrastructure. This dynamic supports sustained demand growth for Tc-99m in markets with expanding healthcare access.

In terms of competition and substitution, positron emission tomography (PET) and radionuclides such as Fluorine-18 are experiencing rapid growth in high-end diagnostic applications. However, their higher costs, logistical challenges, and limited accessibility constrain their ability to fully replace Tc-99m in mainstream clinical practice. Instead, Tc-99m continues to evolve through the development of new radiopharmaceutical kits, improved targeting specificity, and enhanced imaging protocols. Regulatory pathways for Tc-99m-based products are also well established in most major markets, facilitating ongoing innovation and clinical adoption.

Looking ahead, the Technetium-99m market is expected to demonstrate structural stability with gradual supply-side optimization and technological diversification. While demand fundamentals remain strong due to the essential role of nuclear medicine diagnostics, advancements in Mo-99 production and isotope supply resilience will reduce systemic risks over time. Ultimately, Tc-99m is not merely a diagnostic isotope but a critical infrastructure component of global healthcare systems, with enduring strategic and economic significance in the nuclear medicine value chain.

This report studies the global Technetium-99m production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Technetium-99m 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 Technetium-99m that contribute to its increasing demand across many markets.

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**Highlights and key features of the study**

Global Technetium-99m total production and demand, 2021-2032, (Curie)
Global Technetium-99m total production value, 2021-2032, (USD Million)
Global Technetium-99m production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Curie), (based on production site)
Global Technetium-99m consumption by region & country, CAGR, 2021-2032 & (Curie)
U.S. VS China: Technetium-99m domestic production, consumption, key domestic manufacturers and share
Global Technetium-99m production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Curie)
Global Technetium-99m production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Curie)
Global Technetium-99m production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Curie)
This report profiles key players in the global Technetium-99m 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 NRG, Rosatom, ANSTO, Nordion, IRE, 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 Technetium-99m market

**Detailed Segmentation:**

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Curie) and average price (US$/Curie) 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 Technetium-99m Market, By Region:

United States

China

Europe

Japan

South Korea

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ASEAN

India

Rest of World

Global Technetium-99m Market, Segmentation by Type:

Produced by HEU

Produced by LEU

Global Technetium-99m Market, Segmentation by Production Method:

Generator-Derived

Cyclotron-Produced

Global Technetium-99m Market, Segmentation by Clinical Procedure:

Planar Imaging

SPECT

Global Technetium-99m Market, Segmentation by Application:

Medical Imaging

Others

**Companies Profiled:**

NRG

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Rosatom

ANSTO

Nordion

IRE

**Key Questions Answered:**

1. How big is the global Technetium-99m market?
2. What is the demand of the global Technetium-99m market?
3. What is the year over year growth of the global Technetium-99m market?
4. What is the production and production value of the global Technetium-99m market?
5. Who are the key producers in the global Technetium-99m market?
6. What are the growth factors driving the market demand?

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