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

https://marketpublishers.com/r/G74062385361EN.html
Date: September 2026
Pages: 90
Price: US$ 4,480.00 (Single User License)
ID: G74062385361EN

Abstracts

The global Terbium-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 production of Terbium-149 is approximately 37 grams, with a global average market price of around $125,000 per gram. That year, total global production capacity for Terbium-149 reaches approximately 70 grams, and the industry's gross profit margin stands at about 54%. Terbium-149 (Tb-149) is an artificial radioisotope of the element terbium, characterized by an atomic number of 65, a mass number of 149, and a half-life of approximately 4.1 hours. Capable of emitting short-range alpha particles alongside a proportion of positrons, it holds potential for both targeted alpha therapy and PET imaging, making it one of the few radionuclides in nuclear medicine to possess this dual "therapy-plus-imaging" capability. Its alpha particles have an energy of approximately 3.97–3.98 MeV and a tissue range of tens of micrometers, allowing for high linear energy transfer within a localized area; theoretically, this makes it suitable for eliminating micrometastases, single tumor cells, or small tumor foci. Meanwhile, its positron emission offers prospects for PET-based monitoring of drug distribution and post-treatment dosimetry. Together with Terbium-152, Terbium-155, and Terbium-161, this group of terbium radionuclides covers the modalities of PET, SPECT, alpha therapy, and beta therapy.

The upstream segment of the industry chain primarily encompasses high-purity tantalum targets and other nuclear reaction target materials, high-energy proton accelerators, online or offline isotope mass separation equipment, ion sources, radiation shielding facilities, and radiochemical separation consumables. A currently established experimental production route involves bombarding tantalum targets with high-energy protons to generate fission or spallation products, isolating the nuclide with a mass

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number of 149 via ISOL (Isotope Separation On-Line) technology, and subsequently performing chemical purification. Due to Tb-149's short half-life, limited yield, and the potential presence of isobaric impurities during production, key upstream barriers center on access to high-energy accelerators, mass separation efficiency, radionuclide purity, and rapid transport capabilities. The midstream segment consists mainly of nuclear medicine research institutions, radiopharmaceutical laboratories, isotope separation platforms, and specialized radiochemistry teams; these entities are responsible for further purifying the accelerator-produced and isolated Tb-149, converting it into a chemical form suitable for labeling, and conjugating it with targeting vectors such as peptides, antibodies, or folic acid analogs. Terbium is a lanthanide metal capable of forming stable complexes with chelating agents such as DOTA, thereby enabling the development of radiopharmaceuticals linked to various targeting molecules. The midstream sector requires rigorous testing of parameters—including radionuclide purity, radiochemical purity, specific activity, sterility, endotoxin levels, stability, and labeling efficiency—alongside the completion of production, quality control, and distribution within a very short timeframe. Given that Terbium-149 has a half-life of only about four hours, its commercialization relies heavily on close coordination between production facilities, radiopharmaceutical preparation centers, and clinical hospitals; currently, activities remain primarily focused on experimental batches and research projects. The downstream sector of the industry chain encompasses major oncology hospitals, nuclear medicine centers, clinical trial sites for radiopharmaceuticals, and cancer biology research institutions. The core potential application of Terbium-149 lies in conjugating it with specific targeting molecules to treat tumors expressing corresponding receptors or antigens—particularly micro-lesions, disseminated tumor cells, and micrometastases. Simultaneously, its positron-emitting capability allows for PET imaging to monitor the drug's distribution in vivo, providing supplementary data for treatment verification and dosimetry assessment. Research has explored targeting strategies involving folate receptors, peptides, and antibodies; however, the large-scale clinical application of Terbium-149 remains constrained by factors such as production yield, logistical radius, standardized preparation, patient dosimetry, and regulatory approval.

The rising demand for targeted alpha therapy is the primary driver behind the continued development of Terbium-149 (Tb-149). Tb-149 emits alpha particles characterized by high linear energy transfer (LET) and a short tissue range; theoretically, it is well-suited for eliminating micrometastatic lesions, individual tumor cells, and disseminated metastases, with targeted delivery achievable via antibodies, peptides, or small-molecule carriers. As nuclear medicine evolves from traditional external beam radiation and beta-emitter therapies toward highly selective targeted alpha therapy, research

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institutions are seeking novel radionuclides that combine high cytotoxic efficacy with a controllable range of tissue damage. Existing studies demonstrate the potential of Tb-149 in folate receptor- and antibody-targeted therapies, with experimental evidence confirming its ability to kill single cells; consequently, its long-term value hinges on advancements in novel targeting molecules, indication selection, and clinical dosimetry research.

The potential for "theranostic" integration—combining alpha therapy with PET imaging—serves as a key development driver distinguishing Tb-149 from most other alpha-emitting radionuclides. In addition to alpha decay, Tb-149 exhibits positron emission properties, theoretically allowing a single radionuclide to perform both therapy and PET tracing; this enables the monitoring of a radiopharmaceutical's in vivo distribution, targeting efficiency, and uptake in non-target organs. This "Alpha-PET" model promises to minimize discrepancies in chemical properties, pharmacokinetics, and tissue distribution between diagnostic and therapeutic radionuclides, thereby providing more direct data to support patient selection, personalized dosimetry, and post-treatment verification. Furthermore, the suite of terbium radionuclides—comprising Tb-149, Tb-152, Tb-155, and Tb-161—covers applications ranging from PET and SPECT imaging to various forms of particle therapy, facilitating the platform-based development of terbium-based radiopharmaceuticals. The IAEA’s launch of a collaborative research project on terbium-based radiopharmaceuticals for 2026 underscores the international nuclear medicine community's commitment to standardized cooperation regarding production, quality control, and integrated theranostic applications.

Technological trends in the industry will focus primarily on enhancing production yields and radionuclide purity, as well as ensuring the reproducibility of production pathways. Currently, Terbium-149 is primarily produced by bombarding tantalum targets with high-energy protons and employing on-line mass separation; this process places stringent demands on accelerator energy, target stations, ion sources, and mass separation facilities, limiting the number of institutions worldwide capable of stable experimental production. Research conducted in 2024 optimized the ISOLDE production, separation, and purification workflows, boosting the yield of Terbium-149 to a maximum of approximately 260 MBq per batch and achieving a radionuclidic purity exceeding 99%, signaling a transition from low-yield fundamental experiments to the production of batches suitable for preclinical use. Future efforts will explore alternative routes—such as bombarding samarium targets with heavy ions—alongside techniques like laser resonance ionization, the use of more efficient target materials, and rapid radiochemical purification, all aimed at minimizing isobaric impurities and enhancing the capacity for reproducible supply. Research on heavy-ion reactions with samarium targets, made

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public in 2025, further demonstrates the industry's pursuit of alternative production pathways that bypass the limitations associated with a small number of large-scale ISOL facilities.

Report Scope

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

Global Terbium-149 production by Application, production, value, CAGR,

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

This report profiles key players in the global Terbium-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 TRIUMF, CERN, J-PARC, RIBF, 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 Terbium-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 forecast year.

Global Terbium-149 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Market Segmentation

Global Terbium-149 Market, Segmentation by Type:

Purity: >99%

Purity: >98%

Global Terbium-149 Market, Segmentation by Product Form:

Unlabeled Terbium-149 Radionuclide

Terbium-149-labeled Intermediate

Terbium-149 Radiopharmaceutical Preparation

Global Terbium-149 Market, Segmentation by Production Technology Route:

High-energy Proton Fission

Heavy-ion Bombardment

Cyclotron Production

Global Terbium-149 Market, Segmentation by Radionuclide Quality Grade:

Research-grade Radionuclide

Preclinical Drug-grade Radionuclide

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Global Terbium-149 Market, Segmentation by Application:

Cancer Treatment

Scientific Research

Companies Profiled:

TRIUMF

CERN

J-PARC

RIBF

Key Questions Answered

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

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