

Global Terbium-152 Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Terbium-152 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-152 was approximately 124 grams, with an average global market price of around \$39,000 per gram. Total global production capacity for Terbium-152 reached 220 grams in 2025. The average gross profit margin for the industry stood at 26%. Terbium-152 (Tb-152) is an artificial radioisotope of the rare-earth element terbium, characterized by an atomic number of 65, a mass number of 152, and a half-life of approximately 17.5 hours; it is a nuclide of significant diagnostic value within the terbium radioisotope family. Tb-152 decays into stable Gadolinium-152 (Gd-152) primarily via electron capture and positron emission (??), thereby emitting positron signals suitable for Positron Emission Tomography (PET). Accompanied by gamma-ray emission, it is also applicable to high-resolution molecular imaging research. Because Tb-152 shares the same elemental properties as the therapeutic nuclide Tb-161 and the diagnostic nuclide Tb-155—allowing for labeling with identical chelators and targeting molecules—it is considered a key PET diagnostic nuclide within the "terbium theranostics" framework. It facilitates patient screening prior to Tb-161 therapy, assessment of drug distribution, and precise dosimetry planning. Compared to traditional PET nuclides such as Gallium-68 and Fluorine-18, Tb-152 offers a longer half-life and the unique chemical advantages of the terbium element, making it particularly suitable for studying the *in vivo* behavior of antibodies, long-circulating peptides, and complex targeting molecules.

The upstream sector of the Tb-152 industry chain primarily encompasses high-purity enriched gadolinium targets, accelerator equipment, irradiation target stations, radiochemical separation systems, and nuclide quality analysis platforms. Tb-152 is

typically produced via accelerator-based nuclear reactions; common routes include proton bombardment of enriched Gd-152 targets to generate Tb-152, as well as research utilizing targets of other isotopes such as Gd-155 or Gd-156. Another production method involves bombarding heavy-metal targets with high-energy protons and subsequently obtaining high-purity Tb-152 through isotope separation devices. Due to the short half-life of Terbium-152 (Tb-152), production must be tightly coordinated with end-use; consequently, upstream operations typically rely on research cyclotrons, proton accelerators, and large-scale isotope production facilities. Institutions such as CERN-MEDICIS and the Paul Scherrer Institute (PSI) have initiated research into the production of Terbium-series nuclides, driving the development of supply systems for novel theranostic nuclides, including Tb-152. Key upstream technical barriers center on the preparation of enriched Gadolinium (Gd) targets, target recycling, high-purity separation, control of nuclide impurities, and rapid logistics systems for short-lived nuclides. The midstream sector comprises national laboratories, medical isotope R&D institutions, radiopharmaceutical companies, and nuclear medicine technology platforms; these entities are responsible for the separation and purification of Tb-152 from irradiated targets, chemical conversion, and radiopharmaceutical labeling. As Terbium and Gadolinium are both lanthanides with similar chemical properties, Tb-152 production requires highly selective processes—such as ion exchange, extraction chromatography, or multi-column separation—to remove unreacted Gd targets and potential impurity nuclides like Tb-151 and Tb-154. Purified Tb-152 typically exists as a Tb³⁺ solution and is subsequently conjugated with chelating agents (e.g., DOTA or DOTA derivatives) to form radiopharmaceuticals suitable for PET imaging research. Midstream quality control focuses on nuclidic purity, radiochemical purity, specific activity, metal impurity content, labeling stability, and the evaluation of *in vivo* metabolic behavior. With the advancement of precision nuclear medicine, midstream technology is shifting from simple nuclide production toward an integrated service model encompassing nuclide preparation, targeted molecule development, and dosimetry analysis. Downstream applications of Tb-152 primarily involve nuclear medicine centers, oncology diagnostic facilities, radiopharmaceutical R&D companies, and precision medicine research platforms. Its most significant application is as a PET diagnostic nuclide; it forms an elemental theranostic pair with the therapeutic nuclide Tb-161, enabling a "diagnosis-to-therapy" closed loop through the use of identical targeting molecules. For instance, PET imaging using Terbium-152-labeled targeting peptides or small molecules allows for the pre-assessment of tumor target expression, drug distribution, and therapeutic dosages, thereby informing the selection of subsequent treatment regimens—such as those utilizing Terbium-161. This approach minimizes pharmacokinetic disparities between different elemental radionuclides and enhances the precision of personalized radiopharmaceutical therapy. Furthermore, the

relatively long half-life of Terbium-152 (approximately 17.5 hours) makes it more suitable than certain short-lived PET radionuclides for inter-regional transport and complex biodistribution studies, particularly those involving antibodies, nanocarriers, and long-circulating drugs. As multi-modal radiotherapies utilizing alpha, beta, and Auger electron emissions continue to evolve, Terbium-152 is poised to become a key diagnostic component within the Terbium radionuclide platform; however, its commercialization remains constrained by factors such as supply scale, production costs, clinical validation, and the regulatory approval process.

The development of precision radiopharmaceuticals and the integration of diagnostics and therapeutics (theranostics) are the primary drivers of the growing demand for Terbium-152. With the rapid advancement of precision tumor diagnostics and radionuclide therapy, the traditional model of using "diagnostic radionuclides" and "therapeutic radionuclides" separately is shifting toward a theranostic pairing approach. As a positron emission tomography (PET) diagnostic radionuclide, Terbium-152 shares the same elemental properties as the therapeutic radionuclide Terbium-161; both can be labeled using identical chelator systems and targeting molecules. This allows data on drug distribution, tumor uptake, and dosimetry obtained during the diagnostic phase to more accurately predict therapeutic outcomes. This "same-element diagnostic-therapeutic closed-loop" model minimizes pharmacokinetic differences between radionuclides and enhances the precision of personalized treatment, thereby garnering sustained attention in the treatment of neuroendocrine tumors, prostate cancer, and other receptor-targeted malignancies.

The platform-based development of terbium radionuclides creates long-term application potential for Terbium-152. In recent years, the field of nuclear medicine has increasingly focused on the value of a multi-radionuclide terbium suite—comprising Terbium-152 (PET diagnostics), Terbium-155 (SPECT diagnostics), Terbium-161 (beta-particle and Auger electron therapy), and Terbium-149 (alpha therapy research)—to form a comprehensive radionuclide system covering diverse diagnostic and therapeutic scenarios. Compared to traditional diagnostic-therapeutic pairs (such as Gallium-68/Lutetium-177), the terbium series offers advantages such as consistent elemental chemistry, unified labeling methods, and predictable pharmacokinetic behavior, promising to reduce technical transition costs during radiopharmaceutical R&D. As the demand for precision medicine and personalized nuclear medicine therapies rises, the importance of Terbium-152 as a PET diagnostic agent will grow, driving the evolution of the terbium radionuclide series from isolated research products into a comprehensive medical technology platform.

Advancements in production technology and supply chain development are critical drivers for the industrialization of Terbium-152. Currently, Terbium-152 is primarily produced using accelerators, utilizing methods such as proton bombardment of enriched gadolinium targets, high-energy proton-induced reactions, and mass separation techniques. Future industry development will focus on enhancing the utilization efficiency of enriched gadolinium targets, optimizing production processes for low-energy cyclotrons, increasing radionuclide purity, and reducing production costs. Furthermore, given that Terbium-152 has a half-life of approximately 17.5 hours—necessitating precise timing coordination across production, purification, transportation, and clinical application—it is essential to establish regional isotope production centers, automated radiochemical preparation platforms, and standardized quality control systems.

Report Scope

This report studies the global Terbium-152 production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Terbium-152 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-152 that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Terbium-152 total production and demand, 2021-2032, (Gram)

Global Terbium-152 total production value, 2021-2032, (USD Million)

Global Terbium-152 production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Gram), (based on production site)

Global Terbium-152 consumption by region & country, CAGR, 2021-2032 & (Gram)

U.S. VS China: Terbium-152 domestic production, consumption, key domestic

manufacturers and share

Global Terbium-152 production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Gram)

Global Terbium-152 production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Gram)

Global Terbium-152 production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Gram)

This report profiles key players in the global Terbium-152 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, SHINE Technologies, CERN, PSI, 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-152 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-152 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Terbium-152 Market, Segmentation by Type:

Radionuclide Purity: <99%

Radionuclide Purity: ≥99%

Global Terbium-152 Market, Segmentation by Product Form:

Terbium-152 Radionuclide Stock Solution

Terbium-152 Labeling Precursor

Terbium-152 Standard Source

Terbium-152 Irradiation Target Material

Global Terbium-152 Market, Segmentation by Production Route:

Production of Enriched Gadolinium-152 Target

Production of Enriched Gadolinium-155 Target

Production of Natural Gadolinium Target

Production via High-energy Proton Spallation

Global Terbium-152 Market, Segmentation by Quality Grade:

Nuclear Physics Research Grade

Medical Isotope Research Grade

Metrological Standard Grade

Global Terbium-152 Market, Segmentation by Application:

Nuclear Medicine

Industrial Tracer

Scientific Research

Companies Profiled:

Rosatom

ORNL

SHINE Technologies

CERN

PSI

Key Questions Answered

Global Terbium-152 Supply, Demand and Key Producers, 2026-2032

1. How big is the global Terbium-152 market?
2. What is the demand of the global Terbium-152 market?
3. What is the year over year growth of the global Terbium-152 market?
4. What is the total value of the global Terbium-152 market?
5. Who are the Major Players in the global Terbium-152 market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Terbium-152 Introduction
- 1.2 World Terbium-152 Supply & Forecast
 - 1.2.1 World Terbium-152 Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Terbium-152 Production (2021-2032)
 - 1.2.3 World Terbium-152 Pricing Trends (2021-2032)
- 1.3 World Terbium-152 Production by Region (Based on Production Site)
 - 1.3.1 World Terbium-152 Production Value by Region (2021-2032)
 - 1.3.2 World Terbium-152 Production by Region (2021-2032)
 - 1.3.3 World Terbium-152 Average Price by Region (2021-2032)
 - 1.3.4 North America Terbium-152 Production (2021-2032)
 - 1.3.5 Europe Terbium-152 Production (2021-2032)
 - 1.3.6 China Terbium-152 Production (2021-2032)
 - 1.3.7 Japan Terbium-152 Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Terbium-152 Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Terbium-152 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Terbium-152 Demand (2021-2032)
- 2.2 World Terbium-152 Consumption by Region
 - 2.2.1 World Terbium-152 Consumption by Region (2021-2026)
 - 2.2.2 World Terbium-152 Consumption Forecast by Region (2027-2032)
- 2.3 United States Terbium-152 Consumption (2021-2032)
- 2.4 China Terbium-152 Consumption (2021-2032)
- 2.5 Europe Terbium-152 Consumption (2021-2032)
- 2.6 Japan Terbium-152 Consumption (2021-2032)
- 2.7 South Korea Terbium-152 Consumption (2021-2032)
- 2.8 ASEAN Terbium-152 Consumption (2021-2032)
- 2.9 India Terbium-152 Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Terbium-152 Production Value by Manufacturer (2021-2026)

- 3.2 World Terbium-152 Production by Manufacturer (2021-2026)
- 3.3 World Terbium-152 Average Price by Manufacturer (2021-2026)
- 3.4 Terbium-152 Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Terbium-152 Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Terbium-152 in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Terbium-152 in 2025
- 3.6 Terbium-152 Market: Overall Company Footprint Analysis
 - 3.6.1 Terbium-152 Market: Region Footprint
 - 3.6.2 Terbium-152 Market: Company Product Type Footprint
 - 3.6.3 Terbium-152 Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Terbium-152 Production Value Comparison
 - 4.1.1 United States VS China: Terbium-152 Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Terbium-152 Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Terbium-152 Production Comparison
 - 4.2.1 United States VS China: Terbium-152 Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Terbium-152 Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Terbium-152 Consumption Comparison
 - 4.3.1 United States VS China: Terbium-152 Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Terbium-152 Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Terbium-152 Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Terbium-152 Manufacturers, Headquarters and Production Site (States, Country)
 - 4.4.2 United States Based Manufacturers Terbium-152 Production Value (2021-2026)

- 4.4.3 United States Based Manufacturers Terbium-152 Production (2021-2026)
- 4.5 China Based Terbium-152 Manufacturers and Market Share
 - 4.5.1 China Based Terbium-152 Manufacturers, Headquarters and Production Site (Province, Country)
 - 4.5.2 China Based Manufacturers Terbium-152 Production Value (2021-2026)
 - 4.5.3 China Based Manufacturers Terbium-152 Production (2021-2026)
- 4.6 Rest of World Based Terbium-152 Manufacturers and Market Share, 2021-2026
 - 4.6.1 Rest of World Based Terbium-152 Manufacturers, Headquarters and Production Site (State, Country)
 - 4.6.2 Rest of World Based Manufacturers Terbium-152 Production Value (2021-2026)
 - 4.6.3 Rest of World Based Manufacturers Terbium-152 Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

- 5.1 World Terbium-152 Market Size Overview by Type: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Type
 - 5.2.1 Radionuclide Purity: <99%
 - 5.2.2 Radionuclide Purity: ≥99%
- 5.3 Market Segment by Type
 - 5.3.1 World Terbium-152 Production by Type (2021-2032)
 - 5.3.2 World Terbium-152 Production Value by Type (2021-2032)
 - 5.3.3 World Terbium-152 Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PRODUCT FORM

- 6.1 World Terbium-152 Market Size Overview by Product Form: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Product Form
 - 6.2.1 Terbium-152 Radionuclide Stock Solution
 - 6.2.2 Terbium-152 Labeling Precursor
 - 6.2.3 Terbium-152 Standard Source
 - 6.2.4 Terbium-152 Irradiation Target Material
- 6.3 Market Segment by Product Form
 - 6.3.1 World Terbium-152 Production by Product Form (2021-2032)
 - 6.3.2 World Terbium-152 Production Value by Product Form (2021-2032)
 - 6.3.3 World Terbium-152 Average Price by Product Form (2021-2032)

7 MARKET ANALYSIS BY PRODUCTION ROUTE

- 7.1 World Terbium-152 Market Size Overview by Production Route: 2021 VS 2025 VS

2032

7.2 Segment Introduction by Production Route

7.2.1 Production of Enriched Gadolinium-152 Target

7.2.2 Production of Enriched Gadolinium-155 Target

7.2.3 Production of Natural Gadolinium Target

7.2.4 Production via High-energy Proton Spallation

7.3 Market Segment by Production Route

7.3.1 World Terbium-152 Production by Production Route (2021-2032)

7.3.2 World Terbium-152 Production Value by Production Route (2021-2032)

7.3.3 World Terbium-152 Average Price by Production Route (2021-2032)

8 MARKET ANALYSIS BY QUALITY GRADE

8.1 World Terbium-152 Market Size Overview by Quality Grade: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Quality Grade

8.2.1 Nuclear Physics Research Grade

8.2.2 Medical Isotope Research Grade

8.2.3 Metrological Standard Grade

8.3 Market Segment by Quality Grade

8.3.1 World Terbium-152 Production by Quality Grade (2021-2032)

8.3.2 World Terbium-152 Production Value by Quality Grade (2021-2032)

8.3.3 World Terbium-152 Average Price by Quality Grade (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Terbium-152 Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Nuclear Medicine

9.2.2 Industrial Tracer

9.2.3 Scientific Research

9.3 Market Segment by Application

9.3.1 World Terbium-152 Production by Application (2021-2032)

9.3.2 World Terbium-152 Production Value by Application (2021-2032)

9.3.3 World Terbium-152 Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Rosatom

- 10.1.1 Rosatom Details
- 10.1.2 Rosatom Major Business
- 10.1.3 Rosatom Terbium-152 Product and Services
- 10.1.4 Rosatom Terbium-152 Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.1.5 Rosatom Recent Developments/Updates
- 10.1.6 Rosatom Competitive Strengths & Weaknesses
- 10.2 ORNL
 - 10.2.1 ORNL Details
 - 10.2.2 ORNL Major Business
 - 10.2.3 ORNL Terbium-152 Product and Services
 - 10.2.4 ORNL Terbium-152 Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.2.5 ORNL Recent Developments/Updates
 - 10.2.6 ORNL Competitive Strengths & Weaknesses
- 10.3 SHINE Technologies
 - 10.3.1 SHINE Technologies Details
 - 10.3.2 SHINE Technologies Major Business
 - 10.3.3 SHINE Technologies Terbium-152 Product and Services
 - 10.3.4 SHINE Technologies Terbium-152 Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.3.5 SHINE Technologies Recent Developments/Updates
 - 10.3.6 SHINE Technologies Competitive Strengths & Weaknesses
- 10.4 CERN
 - 10.4.1 CERN Details
 - 10.4.2 CERN Major Business
 - 10.4.3 CERN Terbium-152 Product and Services
 - 10.4.4 CERN Terbium-152 Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.4.5 CERN Recent Developments/Updates
 - 10.4.6 CERN Competitive Strengths & Weaknesses
- 10.5 PSI
 - 10.5.1 PSI Details
 - 10.5.2 PSI Major Business
 - 10.5.3 PSI Terbium-152 Product and Services
 - 10.5.4 PSI Terbium-152 Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.5.5 PSI Recent Developments/Updates
 - 10.5.6 PSI Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

11.1 Terbium-152 Industry Chain

11.2 Terbium-152 Upstream Analysis

11.2.1 Terbium-152 Core Raw Materials

11.2.2 Main Manufacturers of Terbium-152 Core Raw Materials

11.3 Midstream Analysis

11.4 Downstream Analysis

11.5 Terbium-152 Production Mode

11.6 Terbium-152 Procurement Model

11.7 Terbium-152 Industry Sales Model and Sales Channels

11.7.1 Terbium-152 Sales Model

11.7.2 Terbium-152 Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

13.1 Methodology

13.2 Research Process and Data Source

13.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Terbium-152 Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Terbium-152 Production Value by Region (2021-2026) & (USD Million)

Table 3. World Terbium-152 Production Value by Region (2027-2032) & (USD Million)

Table 4. World Terbium-152 Production Value Market Share by Region (2021-2026)

Table 5. World Terbium-152 Production Value Market Share by Region (2027-2032)

Table 6. World Terbium-152 Production by Region (2021-2026) & (Gram)

Table 7. World Terbium-152 Production by Region (2027-2032) & (Gram)

Table 8. World Terbium-152 Production Market Share by Region (2021-2026)

Table 9. World Terbium-152 Production Market Share by Region (2027-2032)

Table 10. World Terbium-152 Average Price by Region (2021-2026) & (US\$/g)

Table 11. World Terbium-152 Average Price by Region (2027-2032) & (US\$/g)

Table 12. Terbium-152 Major Market Trends

Table 13. World Terbium-152 Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Gram)

Table 14. World Terbium-152 Consumption by Region (2021-2026) & (Gram)

Table 15. World Terbium-152 Consumption Forecast by Region (2027-2032) & (Gram)

Table 16. World Terbium-152 Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Terbium-152 Producers in 2025

Table 18. World Terbium-152 Production by Manufacturer (2021-2026) & (Gram)

Table 19. Production Market Share of Key Terbium-152 Producers in 2025

Table 20. World Terbium-152 Average Price by Manufacturer (2021-2026) & (US\$/g)

Table 21. Global Terbium-152 Company Evaluation Quadrant

Table 22. World Terbium-152 Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Terbium-152 Production Site of Key Manufacturer

Table 24. Terbium-152 Market: Company Product Type Footprint

Table 25. Terbium-152 Market: Company Product Application Footprint

Table 26. Terbium-152 Competitive Factors

Table 27. Terbium-152 New Entrant and Capacity Expansion Plans

Table 28. Terbium-152 Mergers & Acquisitions Activity

Table 29. United States VS China Terbium-152 Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Terbium-152 Production Comparison, (2021 & 2025

& 2032) & (Gram)

Table 31. United States VS China Terbium-152 Consumption Comparison, (2021 & 2025 & 2032) & (Gram)

Table 32. United States Based Terbium-152 Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Terbium-152 Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Terbium-152 Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Terbium-152 Production (2021-2026) & (Gram)

Table 36. United States Based Manufacturers Terbium-152 Production Market Share (2021-2026)

Table 37. China Based Terbium-152 Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Terbium-152 Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Terbium-152 Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Terbium-152 Production, (2021-2026) & (Gram)

Table 41. China Based Manufacturers Terbium-152 Production Market Share (2021-2026)

Table 42. Rest of World Based Terbium-152 Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Terbium-152 Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Terbium-152 Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Terbium-152 Production, (2021-2026) & (Gram)

Table 46. Rest of World Based Manufacturers Terbium-152 Production Market Share (2021-2026)

Table 47. World Terbium-152 Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Terbium-152 Production by Type (2021-2026) & (Gram)

Table 49. World Terbium-152 Production by Type (2027-2032) & (Gram)

Table 50. World Terbium-152 Production Value by Type (2021-2026) & (USD Million)

Table 51. World Terbium-152 Production Value by Type (2027-2032) & (USD Million)

Table 52. World Terbium-152 Average Price by Type (2021-2026) & (US\$/g)

Table 53. World Terbium-152 Average Price by Type (2027-2032) & (US\$/g)
Table 54. World Terbium-152 Production Value by Product Form, (USD Million), 2021 & 2025 & 2032
Table 55. World Terbium-152 Production by Product Form (2021-2026) & (Gram)
Table 56. World Terbium-152 Production by Product Form (2027-2032) & (Gram)
Table 57. World Terbium-152 Production Value by Product Form (2021-2026) & (USD Million)
Table 58. World Terbium-152 Production Value by Product Form (2027-2032) & (USD Million)
Table 59. World Terbium-152 Average Price by Product Form (2021-2026) & (US\$/g)
Table 60. World Terbium-152 Average Price by Product Form (2027-2032) & (US\$/g)
Table 61. World Terbium-152 Production Value by Production Route, (USD Million), 2021 & 2025 & 2032
Table 62. World Terbium-152 Production by Production Route (2021-2026) & (Gram)
Table 63. World Terbium-152 Production by Production Route (2027-2032) & (Gram)
Table 64. World Terbium-152 Production Value by Production Route (2021-2026) & (USD Million)
Table 65. World Terbium-152 Production Value by Production Route (2027-2032) & (USD Million)
Table 66. World Terbium-152 Average Price by Production Route (2021-2026) & (US\$/g)
Table 67. World Terbium-152 Average Price by Production Route (2027-2032) & (US\$/g)
Table 68. World Terbium-152 Production Value by Quality Grade, (USD Million), 2021 & 2025 & 2032
Table 69. World Terbium-152 Production by Quality Grade (2021-2026) & (Gram)
Table 70. World Terbium-152 Production by Quality Grade (2027-2032) & (Gram)
Table 71. World Terbium-152 Production Value by Quality Grade (2021-2026) & (USD Million)
Table 72. World Terbium-152 Production Value by Quality Grade (2027-2032) & (USD Million)
Table 73. World Terbium-152 Average Price by Quality Grade (2021-2026) & (US\$/g)
Table 74. World Terbium-152 Average Price by Quality Grade (2027-2032) & (US\$/g)
Table 75. World Terbium-152 Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 76. World Terbium-152 Production by Application (2021-2026) & (Gram)
Table 77. World Terbium-152 Production by Application (2027-2032) & (Gram)
Table 78. World Terbium-152 Production Value by Application (2021-2026) & (USD Million)

Table 79. World Terbium-152 Production Value by Application (2027-2032) & (USD Million)

Table 80. World Terbium-152 Average Price by Application (2021-2026) & (US\$/g)

Table 81. World Terbium-152 Average Price by Application (2027-2032) & (US\$/g)

Table 82. Rosatom Basic Information, Manufacturing Base and Competitors

Table 83. Rosatom Major Business

Table 84. Rosatom Terbium-152 Product and Services

Table 85. Rosatom Terbium-152 Production (Gram), Price (US\$/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Rosatom Recent Developments/Updates

Table 87. Rosatom Competitive Strengths & Weaknesses

Table 88. ORNL Basic Information, Manufacturing Base and Competitors

Table 89. ORNL Major Business

Table 90. ORNL Terbium-152 Product and Services

Table 91. ORNL Terbium-152 Production (Gram), Price (US\$/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. ORNL Recent Developments/Updates

Table 93. ORNL Competitive Strengths & Weaknesses

Table 94. SHINE Technologies Basic Information, Manufacturing Base and Competitors

Table 95. SHINE Technologies Major Business

Table 96. SHINE Technologies Terbium-152 Product and Services

Table 97. SHINE Technologies Terbium-152 Production (Gram), Price (US\$/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. SHINE Technologies Recent Developments/Updates

Table 99. SHINE Technologies Competitive Strengths & Weaknesses

Table 100. CERN Basic Information, Manufacturing Base and Competitors

Table 101. CERN Major Business

Table 102. CERN Terbium-152 Product and Services

Table 103. CERN Terbium-152 Production (Gram), Price (US\$/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. CERN Recent Developments/Updates

Table 105. CERN Competitive Strengths & Weaknesses

Table 106. PSI Basic Information, Manufacturing Base and Competitors

Table 107. PSI Major Business

Table 108. PSI Terbium-152 Product and Services

Table 109. PSI Terbium-152 Production (Gram), Price (US\$/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. PSI Recent Developments/Updates

Table 111. PSI Competitive Strengths & Weaknesses

Table 112. Global Key Players of Terbium-152 Upstream (Raw Materials)

Table 113. Global Terbium-152 Typical Customers

Table 114. Terbium-152 Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Terbium-152 Picture

Figure 2. World Terbium-152 Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Terbium-152 Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Terbium-152 Production (2021-2032) & (Gram)

Figure 5. World Terbium-152 Average Price (2021-2032) & (US\$/g)

Figure 6. World Terbium-152 Production Value Market Share by Region (2021-2032)

Figure 7. World Terbium-152 Production Market Share by Region (2021-2032)

Figure 8. North America Terbium-152 Production (2021-2032) & (Gram)

Figure 9. Europe Terbium-152 Production (2021-2032) & (Gram)

Figure 10. China Terbium-152 Production (2021-2032) & (Gram)

Figure 11. Japan Terbium-152 Production (2021-2032) & (Gram)

Figure 12. Terbium-152 Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Terbium-152 Consumption (2021-2032) & (Gram)

Figure 15. World Terbium-152 Consumption Market Share by Region (2021-2032)

Figure 16. United States Terbium-152 Consumption (2021-2032) & (Gram)

Figure 17. China Terbium-152 Consumption (2021-2032) & (Gram)

Figure 18. Europe Terbium-152 Consumption (2021-2032) & (Gram)

Figure 19. Japan Terbium-152 Consumption (2021-2032) & (Gram)

Figure 20. South Korea Terbium-152 Consumption (2021-2032) & (Gram)

Figure 21. ASEAN Terbium-152 Consumption (2021-2032) & (Gram)

Figure 22. India Terbium-152 Consumption (2021-2032) & (Gram)

Figure 23. Producer Shipments of Terbium-152 by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Terbium-152 Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Terbium-152 Markets in 2025

Figure 26. United States VS China: Terbium-152 Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Terbium-152 Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Terbium-152 Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Terbium-152 Production Market Share 2025

Figure 30. China Based Manufacturers Terbium-152 Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Terbium-152 Production Market Share 2025

Figure 32. World Terbium-152 Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Terbium-152 Production Value Market Share by Type in 2025

Figure 34. Radionuclide Purity: <99%

Figure 35. Radionuclide Purity: ≥99%

Figure 36. World Terbium-152 Production Market Share by Type (2021-2032)

Figure 37. World Terbium-152 Production Value Market Share by Type (2021-2032)

Figure 38. World Terbium-152 Average Price by Type (2021-2032) & (US\$/g)

Figure 39. World Terbium-152 Production Value by Product Form, (USD Million), 2021 & 2025 & 2032

Figure 40. World Terbium-152 Production Value Market Share by Product Form in 2025

Figure 41. Terbium-152 Radionuclide Stock Solution

Figure 42. Terbium-152 Labeling Precursor

Figure 43. Terbium-152 Standard Source

Figure 44. Terbium-152 Irradiation Target Material

Figure 45. World Terbium-152 Production Market Share by Product Form (2021-2032)

Figure 46. World Terbium-152 Production Value Market Share by Product Form (2021-2032)

Figure 47. World Terbium-152 Average Price by Product Form (2021-2032) & (US\$/g)

Figure 48. World Terbium-152 Production Value by Production Route, (USD Million), 2021 & 2025 & 2032

Figure 49. World Terbium-152 Production Value Market Share by Production Route in 2025

Figure 50. Production of Enriched Gadolinium-152 Target

Figure 51. Production of Enriched Gadolinium-155 Target

Figure 52. Production of Natural Gadolinium Target

Figure 53. Production via High-energy Proton Spallation

Figure 54. World Terbium-152 Production Market Share by Production Route (2021-2032)

Figure 55. World Terbium-152 Production Value Market Share by Production Route (2021-2032)

Figure 56. World Terbium-152 Average Price by Production Route (2021-2032) & (US\$/g)

Figure 57. World Terbium-152 Production Value by Quality Grade, (USD Million), 2021

& 2025 & 2032

Figure 58. World Terbium-152 Production Value Market Share by Quality Grade in 2025

Figure 59. Nuclear Physics Research Grade

Figure 60. Medical Isotope Research Grade

Figure 61. Metrological Standard Grade

Figure 62. World Terbium-152 Production Market Share by Quality Grade (2021-2032)

Figure 63. World Terbium-152 Production Value Market Share by Quality Grade (2021-2032)

Figure 64. World Terbium-152 Average Price by Quality Grade (2021-2032) & (US\$/g)

Figure 65. World Terbium-152 Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 66. World Terbium-152 Production Value Market Share by Application in 2025

Figure 67. Nuclear Medicine

Figure 68. Industrial Tracer

Figure 69. Scientific Research

Figure 70. World Terbium-152 Production Market Share by Application (2021-2032)

Figure 71. World Terbium-152 Production Value Market Share by Application (2021-2032)

Figure 72. World Terbium-152 Average Price by Application (2021-2032) & (US\$/g)

Figure 73. Terbium-152 Industry Chain

Figure 74. Terbium-152 Procurement Model

Figure 75. Terbium-152 Sales Model

Figure 76. Terbium-152 Sales Channels, Direct Sales, and Distribution

Figure 77. Methodology

Figure 78. Research Process and Data Source

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