

Global Thulium-170 Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G06A13DA1647EN.html>

Date: September 2026

Pages: 76

Price: US\$ 3,480.00 (Single User License)

ID: G06A13DA1647EN

Abstracts

According to our (Global Info Research) latest study, the global Thulium-170 market size was valued at US\$ 12.76 million in 2025 and is forecast to a readjusted size of US\$ 22.46 million by 2032 with a CAGR of 6.9% during review period.

In 2025, global Thulium-170 production was approximately 3,100,000 mCi, with a global average market price of around \$4.00 per mCi. That year, total global production capacity for Thulium-170 reached approximately 4,600,000 mCi, and the industry's average gross profit margin stood at about 37%. Thulium-170 (Tm-170) is an artificial radioisotope of the element thulium, characterized by an atomic number of 69, a mass number of 170, and a half-life of approximately 128.6 days. It primarily decays via beta-minus (??) emission into stable Ytterbium-170 (Yb-170), accompanied by low-energy gamma rays and characteristic X-rays. Due to its relatively low radiation energy and the ability to utilize compact shielding, it is well-suited as a radiation source for the non-destructive testing (NDT) of thin-walled materials and for experimental research.

The upstream segment primarily encompasses high-purity natural Thulium-169 raw materials, thulium oxide or metallic thulium targets, target cladding materials, and research reactors with associated neutron irradiation facilities. Since natural thulium consists almost entirely of the stable isotope Thulium-169, Tm-170 is typically produced via the $^{169}\text{Tm}(n, \gamma)^{170}\text{Tm}$ reaction, eliminating the need for complex pre-irradiation isotope enrichment. Key upstream barriers include the preparation of high-purity targets, reactor neutron flux capabilities, irradiation scheduling, radiological handling capabilities, and qualifications for nuclear material transport. The midstream segment involves target encapsulation, reactor irradiation, cooling, radiochemical analysis, activity calibration, sealed source fabrication, quality inspection, and compliant packaging and transport. Because the produced Tm-170 and unreacted Tm-169 are

isotopes of the same element—making separation via standard chemical methods difficult—the product's specific activity is primarily determined by neutron flux, irradiation duration, and target characteristics. Producers must control radioactive impurities, source core dimensions, activity uniformity, and seal integrity, while offering products in forms such as oxides, solutions, foils, or sealed radioactive sources based on customer requirements. Downstream applications primarily include industrial NDT, research in nuclear physics and radiation technology, instrument calibration, and experimental medical research. In the industrial sector, its low-energy photons enable close-range radiography of thin-walled metal components, small-diameter piping, welds, and precision parts; in the scientific research sector, it is used for detector response testing, shielding material evaluation, dosimetry, and nuclear decay studies. Thulium-170 has also been investigated for use in brachytherapy, bone pain palliation, and as a radioisotope heat source; however, these applications generally remain in the research or specific project implementation stage and have not yet developed into a large-scale market comparable to that of nuclides such as Cobalt-60 and Iridium-192.

The development of Thulium-170 (Tm-170) has been primarily driven by the demand for industrial non-destructive testing. Its low-energy photon emissions make it suitable for inspecting thin-walled metals, small-diameter pipes, precision welds, and electromechanical components; furthermore, it can be fabricated into compact, portable radiation sources that require no external power supply. Sectors such as petrochemicals, aerospace, shipbuilding, pressure vessel manufacturing, and on-site engineering inspection—which require lightweight equipment capable of operating in complex spaces—provide a market niche for Tm-170. However, given that Iridium-192, Selenium-75, Ytterbium-169, and digital X-ray systems remain the primary alternatives, Tm-170 is best positioned for applications requiring shallow penetration depths and specialized operating conditions, rather than as a wholesale replacement for traditional radiation sources.

Research into nuclear medicine and radiotherapy represents a potential driver for growth. Tm-170 undergoes primarily beta-minus (β⁻) decay with a half-life of approximately 128.6 days and emits low-energy photons; research areas include brachytherapy, localized tumor irradiation, bone pain palliation, and radioactive microsphere therapy. Its advantages lie in the ability to produce it via direct neutron activation of natural Thulium-169 (ensuring a relatively clear supply of target material) and the fact that low-energy radiation facilitates the control of radiation doses to surrounding tissues. Nevertheless, medical applications remain largely in the stages of preclinical research, dosimetry validation, or small-scale trials; short-term demand stems mainly from research institutions, so it should not yet be viewed as a mature,

large-scale medical market.

Supply-side development is driven by the availability of irradiation resources in research reactors and capabilities in radioactive source manufacturing. Tm-170 is typically produced via the $^{170}\text{Tm}(n, \gamma)^{170}\text{Tm}$ reaction route. Industry barriers center on high-flux reactor scheduling, target design, specific activity control, impurity detection, hermetic encapsulation, and cross-border transport qualifications. Due to Tm-170's relatively short half-life—resulting in a continuous decline in activity during storage and transport—the industry is increasingly adopting an on-demand production model characterized by "confirmed order → target irradiation → activity calibration → rapid delivery," alongside strategies such as regionalized supply, delivery cycle management, and pricing models that account for activity loss due to decay.

Report Scope

This report is a detailed and comprehensive analysis for global Thulium-170 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 Thulium-170 market size and forecasts, in consumption value (\$ Million), sales quantity (mCi), and average selling prices (US\$/mCi), 2021-2032

Global Thulium-170 market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (mCi), and average selling prices (US\$/mCi), 2021-2032

Global Thulium-170 market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (mCi), and average selling prices (US\$/mCi), 2021-2032

Global Thulium-170 market shares of main players, shipments in revenue (\$ Million), sales quantity (mCi), and ASP (US\$/mCi), 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 Thulium-170

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 Thulium-170 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 ORNL, Rosatom, Nordion, ISOFLEX USA, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Thulium-170 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 Segmentation

Market segment by Type

Thulium-170 Chloride

Thulium-170 Oxide

Thulium-170 Metal

Chelate

Market segment by Radioactivity

Low Activity (<100 mCi)

Medium Activity (100 mCi–20,000 mCi)

High Activity (20,000–200,000 mCi)

Market segment by Manufacturing Method

Direct Activation

Solution Dispensing

Surface Deposition

Double-layer Sealing

Micro Encapsulation

Market segment by Radionuclidic Purity

95%-99%

>99%

Market segment by Application

Nuclear Medicine

Industrial Tracer

Scientific Research

Major players covered

ORNL

Rosatom

Nordion

ISOFLEX USA

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)

Chapter Outline

Chapter 1, to describe Thulium-170 product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Thulium-170, with price, sales quantity, revenue, and global market share of Thulium-170 from 2021 to 2026.

Chapter 3, the Thulium-170 competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Thulium-170 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 Thulium-170 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 Thulium-170.

Chapter 14 and 15, to describe Thulium-170 sales channel, distributors, customers, research findings and conclusion.

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