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# Global 18F-Fluorocholine PET Imaging Agents Market Growth 2026-2032

https://marketpublishers.com/r/G48A3548B11DEN.html
Date: October 2026
Pages: 87
Price: US$ 3,660.00 (Single User License)
ID: G48A3548B11DEN

## Abstracts

The global 18F-Fluorocholine PET Imaging Agents market size is predicted to grow from US$ 30.13 million in 2025 to US$ 37.67 million in 2032; it is expected to grow at a CAGR of 3.3% from 2026 to 2032.

18F-Fluorocholine PET Imaging Agents are diagnostic radiopharmaceuticals based on fluorine-18-labeled fluorocholine, commonly referred to as 18F-FCH, designed for positron emission tomography and PET/CT imaging of tissues with elevated choline transport and phospholipid metabolism. Commercial products are predominantly supplied as sterile solutions for intravenous injection, either in multi-dose vials or as patient-specific unit doses, with activity defined at a specified calibration time because fluorine-18 has a physical half-life of approximately 110 minutes. The product is manufactured through an integrated radiopharmaceutical process involving cyclotron-based 18F production, automated radiosynthesis, purification, sterile formulation, quality control and time-sensitive distribution. The market is centered on clinical-grade finished 18F-fluorocholine radiopharmaceuticals used primarily in prostate cancer imaging, parathyroid imaging and selected liver cancer applications, with hospitals, diagnostic imaging centers and research institutions forming the principal end-user base. The short physical half-life creates a structurally regionalized supply model in which commercial radiopharmaceutical manufacturers, regional radiopharmacies and hospital-based production centers coexist, making production-site coverage and delivery radius important determinants of market access and competitive position.

## Key Findings

In 2025, the average gross margin of the 18F-Fluorocholine PET Imaging Agents industry was approximately 35%–45%.Europe is the largest commercial market and

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production base for 18F-Fluorocholine.Prostate cancer imaging remains the largest application.Parathyroid imaging is currently the fastest-growing application and is becoming an important new source of demand for 18F-Fluorocholine.The number of commercial manufacturers worldwide remains limited.

## Market Trends

The most important market trend is the transition from a prostate-cancer-centered demand structure toward a more diversified clinical profile. 18F-FCH remains an established diagnostic tracer with mature radiosynthesis and regulatory pathways, but its historical role in prostate cancer is increasingly challenged by PSMA PET. At the same time, parathyroid imaging is becoming more clinically relevant, allowing the product to retain value in nuclear medicine despite substitution in its traditional application. The result is a mature market characterized by application redistribution rather than broad-based volume expansion.

A second trend is the continued regionalization of radiopharmaceutical production. Fluorine-18 decay requires production, release testing and delivery to be tightly coordinated within hours. Commercial suppliers therefore compete not only through product registration but also through cyclotron access, manufacturing-site density, quality-control capability and transport coverage. Current European product portfolios continue to show registered 18F-fluorocholine injection products across multiple countries, confirming that supply-network reach remains a key competitive asset.

## Market Dynamics

### Drivers

Demand is supported by the installed base of PET and PET/CT systems, established clinical familiarity with choline metabolism imaging, mature 18F radiochemistry and the growing use of PET in endocrine and oncologic diagnostics. Parathyroid localization is becoming particularly important because fluorocholine PET can provide additional diagnostic value when conventional imaging is inconclusive. The product also benefits from existing manufacturing infrastructure originally developed for other 18F radiopharmaceuticals, allowing qualified cyclotron centers to add FCH production without building an entirely independent supply platform.

### Restraints

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The principal restraint is technological substitution in prostate cancer. PSMA-targeted PET agents provide more disease-specific imaging and have increasingly entered regulatory and reimbursement pathways. EMA data comparing piflufolastat (18F) with fluorocholine (18F) demonstrate a materially higher detection rate for the PSMA tracer, reinforcing a long-term shift away from FCH in prostate cancer recurrence imaging. The short half-life of 18F also limits geographic distribution, increases logistics complexity and prevents the centralized manufacturing economics typical of conventional pharmaceuticals.

### Opportunities

Parathyroid imaging is the clearest near- to medium-term opportunity. Broader clinical recognition of 18F-fluorocholine PET for localization of hyperfunctioning parathyroid tissue can partially offset declining prostate cancer demand. Additional opportunities exist in selected hepatocellular carcinoma imaging, especially in clinical situations where FDG PET is inconclusive. Current product documentation continues to recognize prostate cancer and hepatocellular carcinoma as documented diagnostic indications for fluorocholine (18F), providing an established clinical base for continued use.

### Challenges

The market faces a difficult balance between clinical value and limited commercial scale. Each production center must maintain cyclotron access, GMP-compliant radiosynthesis, quality assurance and rapid delivery while serving a relatively small patient pool compared with FDG. Demand can also shift rapidly when newer tracers gain reimbursement or local production capability. Manufacturers therefore need sufficient tracer portfolios and production utilization across multiple radiopharmaceuticals rather than relying on 18F-FCH as a stand-alone product.

## Industry Chain Analysis

The upstream segment comprises cyclotron systems, enriched target materials, fluorine-18 production inputs, synthesis precursors, disposable cassettes, purification materials, sterile formulation components and radiopharmaceutical packaging. Midstream activities include radionuclide production, automated radiosynthesis, purification, aseptic formulation, quality control, batch release and radioactive-material logistics. Downstream demand comes primarily from hospitals, PET/CT imaging centers and academic or clinical research institutions. Because the product decays continuously after manufacture, the industry chain is unusually time-sensitive, and the physical distance between production sites and end users is a core operating variable rather

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than a secondary logistics consideration.

## Value Chain Analysis

Value is concentrated in regulatory-compliant production and local delivery capability rather than in the molecular raw material itself. Cyclotron operation, GMP radiopharmacy infrastructure, specialized personnel, sterility and radiochemical quality testing, radiation-protection compliance and time-critical distribution account for a substantial share of delivered product value. Manufacturer-level pricing of approximately US$300–350 per patient dose therefore reflects not only the radiopharmaceutical compound but also production scheduling, decay losses, quality release and regional delivery. Multi-product cyclotron networks generally have a structural advantage because fixed infrastructure can be shared across FDG, FCH, PSMA and other PET tracers.

## Segment Insights

By clinical application, prostate cancer imaging remains the largest established segment, while parathyroid imaging is the strongest growth segment. Liver cancer imaging remains smaller and more selective, and other indications account for a limited long tail. By dosage form, multi-dose injection remains the mainstream commercial presentation for centralized and regional radiopharmacy supply, while patient-specific unit doses are important in scheduled delivery models. By production and supply model, commercial radiopharmaceutical production dominates monetized market revenue, while regional radiopharmacies and hospital in-house production remain important for physical supply availability but do not always generate external commercial revenue.

## Downstream Market Opportunities

The most attractive downstream opportunity lies in nuclear medicine centers expanding parathyroid PET pathways, particularly institutions already equipped with PET/CT and access to nearby 18F production. Hospitals that currently rely on conventional parathyroid imaging may become incremental users where fluorocholine PET improves lesion localization and surgical planning. Selected liver cancer applications and difficult oncologic cases provide additional niche demand, but they are unlikely to match the scale of prostate or parathyroid imaging.

## Regional Insights

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Europe holds the strongest position because it combines clinical adoption, regulatory registrations and a relatively dense regional manufacturing network. Western and Southern Europe have established commercial use, while Central and Eastern Europe also contain several specialized radiopharmaceutical manufacturers and regional production centers. Curium’s current European portfolio continues to list Fluorocholine (18F) as an active PET product across multiple countries, illustrating the depth of the regional commercial infrastructure. North America has substantial PET and cyclotron capabilities but a less developed commercial FCH market, with greater emphasis on alternative prostate cancer tracers and institution-based production. Asia Pacific remains comparatively limited in commercial 18F-FCH supply, with hospital or research production more visible than large-scale branded distribution.

## Competitive Landscape Analysis

Competition is primarily regional rather than purely global. Europe contains the highest concentration of commercial manufacturers, licensed production sites and specialized radiopharmacies, producing a competitive structure in which a limited number of large radiopharmaceutical groups coexist with country-level and regional manufacturers. Competitive advantage depends on registered product coverage, cyclotron-site density, reliable same-day production, release testing and delivery radius. Central and Eastern Europe exhibit a relatively active base of specialized producers, while North America and Asia have fewer clearly established commercial FCH suppliers. The competitive landscape is therefore best understood as a network-based radiopharmaceutical market in which local manufacturing access can be as important as corporate scale.

## Report Scope

LP Information, Inc. (LPI) ' newest research report, the “18F-Fluorocholine PET Imaging Agents Industry Forecast” looks at past sales and reviews total world 18F-Fluorocholine PET Imaging Agents sales in 2025, providing a comprehensive analysis by region and market sector of projected 18F-Fluorocholine PET Imaging Agents sales for 2026 through 2032. With 18F-Fluorocholine PET Imaging Agents sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world 18F-Fluorocholine PET Imaging Agents industry.

This Insight Report provides a comprehensive analysis of the global 18F-Fluorocholine PET Imaging Agents landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with

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a focus on 18F-Fluorocholine PET Imaging Agents portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global 18F-Fluorocholine PET Imaging Agents market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for 18F-Fluorocholine PET Imaging Agents and breaks down the forecast by Dosage Form, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global 18F-Fluorocholine PET Imaging Agents.

This report presents a comprehensive overview, market shares, and growth opportunities of 18F-Fluorocholine PET Imaging Agents market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### Segmentation by Dosage Form:

Multi-dose Injection

Patient-specific Unit Dose

Others

### Segmentation by Production and Supply Model:

Commercial Radiopharmaceutical Production

Regional Radiopharmacy Production

In-house Hospital Production

Others

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## Segmentation by Application:

Prostate Cancer Imaging

Parathyroid Imaging

Liver Cancer Imaging

Others

## This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

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Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Curium

Novartis AG

Siemens Healthineers AG

Synektik S.A.

Voxel S.A.

BIONT, a.s.

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B.V. Cyclotron VU

ITEL Telecomunicazioni S.r.l.

PositroScint Pvt. Ltd.

## Key Questions Addressed in this Report

What is the 10-year outlook for the global 18F-Fluorocholine PET Imaging Agents market?

What factors are driving 18F-Fluorocholine PET Imaging Agents market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do 18F-Fluorocholine PET Imaging Agents market opportunities vary by end market size?

How does 18F-Fluorocholine PET Imaging Agents break out by Dosage Form, by Application?

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