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Global Radiochemical Analysis Market Growth (Status and Outlook) 2026-2032

https://marketpublishers.com/r/GDADE81652B6EN.html
Date: October 2026
Pages: 131
Price: US$ 3,660.00 (Single User License)
ID: GDADE81652B6EN

Abstracts

The global Radiochemical Analysis market size is predicted to grow from US$ 1029 million in 2025 to US$ 1644 million in 2032; it is expected to grow at a CAGR of 7.0% from 2026 to 2032.

Radiochemical Analysis refers to laboratory-based analytical services used to identify, separate, characterize and quantitatively determine radionuclides and radioactive constituents in environmental, nuclear, industrial, biological, food, water and other sample matrices. The analysis typically combines radiochemical sample preparation and separation with measurement technologies such as gamma spectrometry, alpha spectrometry, liquid scintillation counting, gas-flow proportional counting and mass spectrometry. Services may include gross alpha/beta screening, radionuclide-specific analysis, isotopic composition determination, low-level radioactivity testing, radioactive waste characterization, NORM/TENORM analysis, nuclear decommissioning support and analytical interpretation.

For the purposes of this report, market revenue includes externally purchased laboratory testing, sample preparation, radionuclide separation, measurement, data validation and associated analytical reporting services. It excludes sales of radiation detection instruments, laboratory equipment, reagents and reference materials; manufacture of radioactive isotopes or radiolabeled compounds; standalone radiation dosimetry or workplace radiation surveys without laboratory radionuclide analysis; and captive internal laboratory activities that are not sold to external customers.

Radiochemical Analysis is a specialized analytical-testing market centered on the identification, separation and quantitative measurement of radioactive isotopes in environmental, nuclear, industrial, biological and waste samples. Typical techniques

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include gamma spectrometry, alpha spectrometry, liquid scintillation counting, gas-flow proportional counting and ICP-MS following radionuclide-specific chemical separation. Demand is generated mainly by nuclear power plant operation, nuclear decommissioning, radioactive waste characterization, environmental monitoring, drinking-water compliance, uranium and mineral processing, NORM/TENORM management, government nuclear programs and selected nuclear-medicine applications.

Market Drivers

Nuclear power remains the largest structural demand base. A second major driver is radioactive waste and nuclear decommissioning. Radiochemical laboratories determine radionuclide inventories before waste classification, treatment, transportation and disposal. The expansion of legacy-site cleanup programs in the United States and Europe provides recurring testing demand over long project cycles.

Environmental regulation forms another stable demand pillar. Radiochemical analysis is required for radionuclides in drinking water, groundwater, wastewater, soils, sediments, vegetation and industrial waste. The U.S. EPA continues to maintain approved radiochemical methods and standardized analytical protocols for gross alpha/beta, radium and other radionuclides.

Market Characteristics

The industry has a strong “qualification before price” characteristic. For conventional chemical testing, customers can often switch laboratories relatively easily; radiochemical projects are more dependent on laboratory licenses, accreditation scope, radionuclide capability, detection limits, radioactive sample activity limits and historical qualification by nuclear or government customers. ISO/IEC 17025, DOE/DOD programs, nuclear-quality requirements and national radioactive-material licensing therefore create substantial entry barriers.

The market is also fragmented rather than dominated by a handful of global laboratories. Large testing groups coexist with specialized radiochemistry laboratories, nuclear technology companies, research institutes and government laboratories.

Regional Market Situation

North America is currently the largest commercial Radiochemical Analysis market. The United States combines the world's largest operating nuclear fleet with extensive DOE

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legacy nuclear cleanup activities, commercial nuclear decommissioning, uranium-related projects, environmental monitoring and NORM/TENORM testing.

Europe is another major market, supported by the large French nuclear fleet, operating plants elsewhere in Europe, decommissioning programs in Germany and the UK, radioactive-waste management and stringent environmental regulation.

Asia Pacific is expected to record the strongest long-term expansion. China is the primary growth engine due to its nuclear reactor construction program, while Japan maintains substantial requirements associated with operating facilities, decommissioning, waste management and environmental surveillance. South Korea also supports meaningful nuclear analytical demand. The continuing shift of new reactor construction toward Asia should gradually increase the region's share of the global commercial market.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Radiochemical Analysis landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Radiochemical Analysis portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Radiochemical Analysis market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Radiochemical Analysis and breaks down the forecast by Type, 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 Radiochemical Analysis.

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This report presents a comprehensive overview, market shares, and growth opportunities of Radiochemical Analysis market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

Gamma Spectrometry

Alpha Spectrometry

Liquid Scintillation Counting

Gas-Flow Proportional Counting

Mass Spectrometric Analysis

Other Specialized Methods

Segmentation by Analytical Objectives:

Gross Analysis

Nuclide-Specific Analysis

Segmentation by Chemical Separation Requirements:

Non-Destructive Analysis

Destructive Analysis

Segmentation by Application:

Nuclear Power & Fuel Cycle

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Environmental Monitoring & Remediation

Oil, Gas, Mining & NORM/TENORM

Water & Food Safety

Healthcare & Life Sciences

Research, Government & Other Industrial

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 analyzing the company's coverage, product portfolio, its market penetration.

SGS

Eurofins Scientific

ALS Limited

Pace Analytical

Jacobs

SOCOTEC

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Framatome

Tracerco

GEL Laboratories

AGROLAB GROUP

Southwest Research Institute

SRC Environmental Analytical Laboratories

Centre Testing International

PONY Testing Group

Environmental Control Center

FITI Testing & Research Institute

Energy Laboratories

Hazen Research

Nuclear Technology Services

Summit Environmental Technologies

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