

Global Thulium-170 Market Growth 2026-2032

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Abstracts

The global Thulium-170 market size is predicted to grow from US\$ 12.13 million in 2025 to US\$ 21.88 million in 2032; it is expected to grow at a CAGR of 7.4% from 2026 to 2032.

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 (β⁻) 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

LP Information, Inc. (LPI)'s newest research report, the "Thulium-170 Industry Forecast" looks at past sales and reviews total world Thulium-170 sales in 2025, providing a comprehensive analysis by region and market sector of projected Thulium-170 sales for 2026 through 2032. With Thulium-170 sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Thulium-170 industry.

This Insight Report provides a comprehensive analysis of the global Thulium-170 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 a focus on Thulium-170 portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Thulium-170 market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Thulium-170 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 Thulium-170.

This report presents a comprehensive overview, market shares, and growth opportunities of Thulium-170 market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Thulium-170 Chloride

Thulium-170 Oxide

Thulium-170 Metal

Chelate

Segmentation by Radioactivity:

Low Activity (<100 mCi)

Medium Activity (100 mCi–20,000 mCi)

High Activity (20,000–200,000 mCi)

Segmentation by Manufacturing Method:

Direct Activation

Solution Dispensing

Surface Deposition

Double-layer Sealing

Micro Encapsulation

Segmentation by Radionuclidic Purity:

95%-99%

99%

Segmentation by Application:

Nuclear Medicine

Industrial Tracer

Scientific Research

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

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.

ORNL

Rosatom

Nordion

ISOFLEX USA

Key Questions Addressed in this Report

What is the 10-year outlook for the global Thulium-170 market?

What factors are driving Thulium-170 market growth, globally and by region?

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

How do Thulium-170 market opportunities vary by end market size?

How does Thulium-170 break out by Type, by Application?

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