

Radiopharmaceuticals Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Application (Oncology, Cardiology, Neurology, Pulmonary, Urology, and Others), Type (Diagnostic and Therapeutic), Tracer Type (Tc-99m, F-18, Ga-68, TL-201, I-131, Fe-59, Lu-171, RB-82 and N-13, Cr-51 and P-32, Sc-46, Sg-269 and Hs-269, and Others), End User (Hospitals and Clinics, Diagnostic Centers, Academic and Research Institutes, and Others), and Geography (North America, Europe, Asia Pacific, Middle East & Africa, and South & Central America)

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Abstracts

The radiopharmaceuticals market size is projected to surge from US\$ 9.07 billion in 2023 to US\$ 26.51 billion by 2031; the market is estimated to record a CAGR of 14.4% during 2023–2031. The rising prevalence of chronic diseases and the growing number of clinical trials in targeted therapy propel the radiopharmaceuticals market growth.

Radiopharmaceuticals have proven to handle the diagnosis and treatment of age-related diseases efficiently. The development of radiopharmaceuticals with improved targeting capabilities, longer half-lives, and fewer side effects makes them more attractive for various applications. Research into theranostics that combine diagnostic and therapeutic functions in a single radiopharmaceutical is promising and could further drive the market growth. As governments across the world recognize the value of

radiopharmaceuticals in improving health outcomes, an increase in the funding for research and development of new radiopharmaceuticals and supportive regulatory pathways for their approval has been observed. Further, the market is progressing toward meeting the demands of a changing healthcare landscape, and the evolving radiopharmacy facilities using advanced diagnostic techniques are expected to bring new radiopharmaceuticals market trends in the coming years.

Rising Prevalence of Chronic Diseases Drives the Radiopharmaceuticals Market

Chronic diseases such as lung diseases, cancer, stroke, Alzheimer's, cardiovascular diseases (CVDs), chronic kidney disease, and various neurological disorders are increasing swiftly across the world. As per the World Health Organization (WHO), in 2020, ~10 million deaths were reported due to cancer globally. Likewise, as per the estimations of the American Cancer Society, in 2020, ~1,806,590 new cases of cancer were diagnosed in the US. As per the National Cancer Registry Program Report 2020, in India, 679,421 cancer cases were reported in males, and the number is anticipated to increase to ~763,575 by 2025; whereas in females, 712,758 cancer cases were recorded in 2020, and the number is predicted to reach 806,218 by 2025. According to the American Cancer Society's report, in 2023, ~43,720 new cases of thyroid cancer (31,180 in women and 12,540 in men) were recorded. CVDs are among the most prevalent types of chronic diseases that result in a high mortality rate. The Centers for Disease Control and Prevention states that heart disease is the leading cause of death in the US. According to the same source, in 2020, ~697,000 deaths, i.e., 1 in 5 deaths, were caused by heart disease in the US. According to the Parkinson's Foundation, Parkinson's symptoms are usually observed in individuals aged 60 years and above. The Canadian Psychological Association states that about 2% of the population in Canada suffers from obsessive-compulsive disorder. As per the WHO, neurological diseases contribute to 6.3% of the global disease burden and are also among the leading causes of death worldwide. 13.2% and 16.8% of deaths are reported due to neurological diseases in developed and low- and middle-income countries, respectively. Radiopharmaceuticals have been demonstrated to have high efficiency in diagnosing neurological and neurodegenerative disorders and musculoskeletal conditions. Radiopharmaceuticals are set apart due to their dual functionality. They not only enhance the visualization of diseases but also provide crucial functional information. Among the various methods available, radioisotope cell labeling is one of the most promising techniques to track cells to investigate their biodistribution. Thus, the surging incidence of chronic diseases is driving the radiopharmaceuticals market growth.

Market Trend

Evolving Radiopharmacy Facilities

Nuclear medicine is a field that is undergoing many changes. As radiopharmaceuticals evolve rapidly, more advanced diagnostic techniques such as PET and radiotherapeutics are becoming more widely used. In low-income countries, the technology is still being established, owing to the efforts by the International Atomic Energy Agency (IAEA), while in some of the technologically advanced countries such as the US, it is evolving into standard care, particularly with the advent of theranostics.

Several African countries are working toward expanding and modernizing their radiopharmaceutical facilities to produce radiopharmaceutical medicines with the help of IAEA's Technical Cooperation Program and coordinated research projects. For instance, with IAEA's support, Tunisia, a country in North Africa, started using PET. At the same time, in Algeria, a medical cyclotron was installed and commissioned. The machine enables the country to produce its radiopharmaceuticals and enables routine PET imaging for many types of cancer, such as lymphoma and lung and colon cancer.

The International Symposium on Trends in Radiopharmaceuticals showcases the bright future of radiopharmaceutical chemistry and nuclear medicine. Advances in isotope production, radiochemistry, and the implementation of novel radiopharmaceuticals in human studies lead to exciting results. In particular, theranostic strategies, which use imaging to guide targeted therapy, and the growing areas of research are helping the global nuclear medicine community realize the potential of personalized medicine through the development of new radiotherapeutics. Theranostics merges diagnostics and therapy in a single approach. Radioactive tracers identify specific targets (diagnosis) and then perform targeted therapies. This approach lets physicians personalize treatment plans for patients by assessing their response to therapy in real time. Theranostics are particularly promising for the treatment of certain forms of cancer, such as prostate cancer and neuroendocrine tumors. With new radiotracers and imaging agents, molecular imaging is becoming more specific and sensitive, enabling earlier and more accurate disease detection. In addition, hybrid imaging, such as PET-CT and PET-MRI, combines two or more imaging modalities to provide complementary information and improve diagnostic accuracy. These approaches combine functional and anatomical information, enabling a comprehensive overview of disease processes. Therefore, such developments and approaches are expected to drive the market growth in the future.

The "Global Radiopharmaceuticals Market" is segmented on the basis of application,

tracer type, end user, and geography.

Application-Based Insights

Based on application, the radiopharmaceuticals market analysis is carried out by considering the following segments: oncology, cardiology, neurology, pulmonary, urology, and others. The oncology segment held the largest market share in 2023 and is anticipated to register the highest CAGR of 14.8% during the forecast period. Cancer is one of the major health problems with a high mortality rate. As per the WHO, in 2020, an estimated 10.1 million new cancer cases were diagnosed, and 10 million people died from cancer worldwide. The diagnosis and treatment of patients with cancer require access to imaging to ensure accurate management decisions and optimal outcomes. Nuclear medicine therapy is used to treat cancer, and the most common radiotracer is F-18 fluorodeoxyglucose (FDG). FDG is similar to glucose, and cancer cells are more metabolically active; therefore, they absorb glucose at a higher rate. This can be seen on PET scans and thereby allows the healthcare professional to detect the disease. Fluorine-18 labeled as fluorodeoxyglucose is effective in differentiating malignant from benign tumors and in determining the extent of the disease. People with neuroendocrine tumors (NETs) have wider access to PRRT following the FDA approval of lutetium Lu 177 dotatate (Lutathera) in January 2018.

End User-Based Insights

By end user, the market is segmented into hospitals and clinics, diagnostic centers, academic and research institutes, and others. The hospitals and clinics segment dominated the radiopharmaceuticals market share in 2023. The diagnostic centers segment is anticipated to register the highest CAGR of 14.8% during 2023–2031. Hospitals and clinics utilize technologically advanced treatment for cardiac aneurysms, oncology tumors, neurology aneurysms, and other treatment procedures. The growing need for cardiovascular and neurology aneurysm treatments has become one of the major factors driving the market growth for the hospitals and clinics segment. Most of the surgeries are being performed in hospitals, owing to the continuous patient care and monitoring.

US Food and Drug Administration, European Union, World Health Organization, International Atomic Energy Agency, Centers For Disease Control And Prevention, National Cancer Institute, National Medical Products Administration, Organization For Economic Co-Operation And Development, and Canadian Nuclear Safety Commission are some of the relevant sources referred while preparing the radiopharmaceuticals

market research report.

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12. RADIOPHARMACEUTICALS MARKET-INDUSTRY LANDSCAPE

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