

Radiopharmaceuticals Third-Party Logistics Market Size, Share and Growth Outlook 2026: By Supply Chain (Cold Chain, Non-Cold Chain), By Service Type, By End-User, By Mode of Transport, Companies to 2034.

<https://marketpublishers.com/r/R93B313FFEF2EN.html>

Date: July 2026

Pages: 190

Price: US\$ 3,482.00 (Single User License)

ID: R93B313FFEF2EN

Abstracts

The global Radiopharmaceuticals Third-Party Logistics Market size is forecast to increase from \$1141.28 Million in 2026 to \$3814.45 Million in 2034 at a CAGR of 16.28% between 2026 and 2034.

The Radiopharmaceuticals Third-Party Logistics market report provides detailed analysis and outlook of Radiopharmaceuticals Third-Party Logistics segments including By Supply Chain (Cold Chain, Non-Cold Chain), By Service Type (Transportation, Warehousing and Storage, Packaging and Monitoring Services, Regulatory Compliance Services, Inventory Management, Others), By End-User (Hospitals, Diagnostic Centers, Pharmaceutical and Biotechnology Companies, Research Institutes, Others), By Mode of Transport (Air, Road, Sea, Rail) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Radiopharmaceuticals Third-Party Logistics Industry Overview

Time-Critical Delivery Networks and Specialized Infrastructure Are Transforming Radiopharmaceutical Logistics

The radiopharmaceuticals third-party logistics industry is undergoing rapid expansion as the commercialization of theranostics, targeted radioligand therapies, and molecular imaging agents increases demand for highly specialized distribution networks. Unlike

conventional pharmaceuticals, radiopharmaceutical products often contain isotopes with extremely short half-lives, requiring tightly synchronized manufacturing, transportation, storage, and administration workflows. This operational complexity is driving investment in dedicated cold-chain systems, radiation-shielded transport assets, real-time monitoring technologies, and just-in-time delivery platforms. Logistics providers are increasingly positioning themselves as integrated operational partners that support the entire radiopharmaceutical value chain, from isotope production facilities to nuclear pharmacies and hospital treatment centers.

Regulatory Compliance and Real-Time Monitoring Are Becoming Critical Competitive Differentiators

As regulatory scrutiny surrounding radioactive material transport intensifies, logistics providers are investing heavily in quality assurance infrastructure and operational visibility platforms. Supporting this trend, Life Couriers achieved comprehensive Good Distribution Practice certification across its specialized radiopharmaceutical transport infrastructure through its Radiopharma Germany operations. The certification validates the company's capabilities in radiation-shielded storage, temperature-controlled transport, real-time shipment tracking, and direct hospital delivery services for highly time-sensitive nuclear medicines. Similarly, World Courier expanded its Real-Time Temperature Monitoring network across its global healthcare logistics fleet, integrating continuous temperature telemetry with GPS-based location tracking. This system allows logistics operators to proactively intervene when temperature excursions or delivery disruptions threaten the integrity of radiopharmaceutical products before radioactive decay compromises therapeutic or diagnostic efficacy.

Theranostics Growth Is Driving Integration Between Manufacturing and Distribution Systems

The rapid expansion of theranostic medicine is creating demand for increasingly sophisticated logistics coordination platforms capable of synchronizing isotope production schedules with clinical treatment workflows. Supporting this transition, Cardinal Health expanded the capabilities of its Nuctrac™ platform through the introduction of a dedicated Theranostics Module designed to manage complex radiopharmaceutical supply chains. The system directly links production scheduling, nuclear pharmacy operations, transportation networks, and hospital administration workflows to support emerging therapeutic isotopes such as Actinium-225 and Gallium-68. By coordinating preparation schedules and just-in-time delivery requirements across multiple stakeholders, these digital logistics platforms are

becoming essential infrastructure components for the growing radiopharmaceutical and targeted radionuclide therapy markets.

Radiopharmaceuticals Third-Party Logistics Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Radiopharmaceuticals Third-Party Logistics market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- McKesson Corporation, United Parcel Service of America, Inc. (UPS), FedEx Corporation, DHL International GmbH, Kuehne + Nagel International AG, AmerisourceBergen (Cencora), DB Schenker, Nippon Express Group, CH Robinson Worldwide, Inc., SF Express Co., Ltd.. The Radiopharmaceuticals Third-Party Logistics market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Radiopharmaceuticals Third-Party Logistics industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Radiopharmaceuticals Third-Party Logistics Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Radiopharmaceuticals Third-Party Logistics companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Radiopharmaceuticals Third-Party Logistics markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and

long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Radiopharmaceuticals Third-Party Logistics Market Competitive Benchmarking and Company Analysis

Leading companies in Radiopharmaceuticals Third-Party Logistics industry include- McKesson Corporation, United Parcel Service of America, Inc. (UPS), FedEx Corporation, DHL International GmbH, Kuehne + Nagel International AG, AmerisourceBergen (Cencora), DB Schenker, Nippon Express Group, CH Robinson Worldwide, Inc., SF Express Co., Ltd.. The Radiopharmaceuticals Third-Party Logistics market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Radiopharmaceuticals Third-Party Logistics Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Radiopharmaceuticals Third-Party Logistics market remains one of the strongest-performing segments in the country.

The US Radiopharmaceuticals Third-Party Logistics Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Radiopharmaceuticals Third-Party Logistics market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems

throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Radiopharmaceuticals Third-Party Logistics industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Radiopharmaceuticals Third-Party Logistics markets

Canada's strong Radiopharmaceuticals Third-Party Logistics sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Radiopharmaceuticals Third-Party Logistics market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Radiopharmaceuticals Third-Party Logistics Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Radiopharmaceuticals Third-Party Logistics market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Radiopharmaceuticals Third-Party Logistics population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Radiopharmaceuticals Third-Party Logistics industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Radiopharmaceuticals Third-Party Logistics market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Radiopharmaceuticals Third-Party Logistics sales through 2034

France Radiopharmaceuticals Third-Party Logistics companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Radiopharmaceuticals Third-Party Logistics Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Radiopharmaceuticals Third-Party Logistics distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Radiopharmaceuticals Third-Party Logistics Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Radiopharmaceuticals Third-Party Logistics market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Radiopharmaceuticals Third-Party Logistics industry, offering

opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Radiopharmaceuticals Third-Party Logistics industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Radiopharmaceuticals Third-Party Logistics Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Radiopharmaceuticals Third-Party Logistics market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Radiopharmaceuticals Third-Party Logistics market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Radiopharmaceuticals Third-Party Logistics Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending.

Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Radiopharmaceuticals Third-Party Logistics Market Segmentation

By Supply Chain

Cold Chain

Non-Cold Chain

By Service Type

Transportation

Warehousing and Storage

Packaging and Monitoring Services

Regulatory Compliance Services

Inventory Management

Others

By End-User

Hospitals

Diagnostic Centers

Pharmaceutical and Biotechnology Companies

Research Institutes

Others

By Mode of Transport

Air

Road

Sea

Rail

Leading Companies in Radiopharmaceuticals Third-Party Logistics Industry (2026)

McKesson Corporation

United Parcel Service of America, Inc. (UPS)

FedEx Corporation

DHL International GmbH

Kuehne + Nagel International AG

AmerisourceBergen (Cencora)

DB Schenker

Nippon Express Group

CH Robinson Worldwide, Inc.

SF Express Co., Ltd.

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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FedEx Corporation

DHL International GmbH

Kuehne + Nagel International AG

AmerisourceBergen (Cencora)

DB Schenker

Nippon Express Group

CH Robinson Worldwide, Inc.

SF Express Co., Ltd.

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