

South Korea Nuclear Imaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

South Korea Nuclear Imaging Market Analysis

The South Korea nuclear medicine market size is valued at USD 195.82 million in 2025 and is projected to reach USD 287.63 million by 2030, advancing at an 8.04% CAGR over the forecast period. Robust demand for precision oncology diagnostics, expanding domestic radioisotope production, and rapid integration of artificial intelligence (AI) into imaging workflows collectively underpin this trajectory. Continued build-out of cyclotron capacity, coupled with favorable reimbursement for neurology PET tracers, is widening clinical adoption beyond the Seoul-Busan corridor. Private-sector hospital investment is shortening equipment refresh cycles, while international medical-tourism inflows stimulate premium diagnostic services. Persistent supply-chain fragility for imported isotopes and workforce shortages in nuclear-medicine technologists remain structural headwinds.

South Korea Nuclear Imaging Market Trends and Insights

Growing Oncology PET/CT Demand Driven by an Aging Population

Korea's population aged 65 plus will reach 20.3% in 2025, placing sustained pressure on oncology imaging capacity. High-sensitivity PET/CT scanners deployed at the National Cancer Center show markedly improved lesion detection in prostate cancer, achieving 86.9% accuracy with 68Ga-NGUL tracers. Hospitals are accelerating procurement schedules, with Yonsei Cancer Center adding a carbon-ion facility that began treating patients in 2023. Parallel clinical-trial data demonstrate 49.5% objective response rates for targeted alpha therapy in neuroendocrine tumors. These factors combine to keep the South Korea nuclear

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medicine market firmly anchored in oncology leadership.

Government Reimbursement Expansion for Dementia PET Tracers

The Health Insurance Review and Assessment Service widened coverage for amyloid and tau PET imaging in January 2025, cutting patient co-payments by 18%. The policy supports a projected trebling of dementia prevalence by 2050, intensifying demand for early PET-based diagnosis. Seoul-based tertiary centers report 92% diagnostic accuracy when pairing AI analytics with PET for mild cognitive impairment screening. Expanded insurance coverage thereby sustains medium-term volume growth for the South Korea nuclear medicine market.

Radiopharmaceutical Supply-Chain Intermittency

The October 2024 European reactor outage slashed Mo-99 output by 50%, forcing Korean clinics to ration 99mTc doses. Cardiology centers extended imaging windows and curtailed elective studies, undercutting procedure volumes. Reliance on aged foreign reactors exposes Korea to geopolitical and maintenance shocks, pressuring procurement budgets. Accelerated domestic actinium-225 and Ga-68 programs mitigate but do not yet eliminate risk. Supply instability remains the largest drag on the South Korea nuclear medicine market.

Other drivers and restraints analyzed in the detailed report include:

Roll-out of Domestic Ga-68 Generator Manufacturing Capacity / Hospital Privatization Accelerates Equipment Refresh Cycles / High Capital Cost of PET/MR Limiting Provincial Access /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The Equipment segment captured 53.45% of the South Korea nuclear medicine market share in 2024, underscoring provider commitment to high-resolution molecular imaging. Rapid rollout of digital detector technology improves sensitivity, letting hospitals justify premium pricing. Domestic Ga-68 production lowers tracer overhead, raising PET utilization rates across oncology and neurology. SPECT retains a strong installed base, yet faces competitive displacement in capital budgets. Equipment vendors increasingly bundle AI reconstruction to differentiate offerings, supporting higher average-selling prices.

Radioisotopes is projected to expand at an 8.12% CAGR on a value basis through 2030 as provincial hospitals favor its lower entry cost. Hybrid SPECT/CT upgrades extend the modality's lifespan by improving anatomical localization in cardiology and thyroid imaging. The radioisotope sub-segment benefits from steady technetium-99m demand despite global supply volatility. Cyclotron-enabled copper-64 and gallium-68 pipelines diversify tracer options, reinforcing resilience. Overall, the South Korea nuclear medicine market continues to tilt toward PET while sustaining niche opportunities in SPECT and emerging therapeutic isotopes.

The Nuclear Medicine Market Report is Segmented by Product (Equipment, Radioisotopes Including SPECT and PET Isotopes), Application (Cardiology, Neurology, Thyroid, Oncology, Other Applications), End User (Hospitals, Diagnostic Imaging Centres, Academic & Research Institutes), and Geography (South Korea). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

GE HealthCare Technologies Inc. / Siemens Healthineers / Koninklijke Philips / Canon / United Imaging Healthcare Co., Ltd. / Eckert

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The market estimate (ME) sheet in Excel format /
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