

# Nuclear Medicine

*The Key European markets*

including Scintigraphy and PET studies



[www.medicaloptions.co.uk](http://www.medicaloptions.co.uk)

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***Included within this document :-***

- ***Background to the study***
- ***What subscribers to the study will receive***
- ***Cost of the study to subscribers***
- ***Table of contents of the report***

## Introduction

Nuclear Medicine faces challenges. Technetium supply can be erratic. Ultrasound, CT, MR threaten to appropriate a large proportion of nuclear studies. PET/CT needs to be accommodated taking space and procedures from scintigraphy.

Medical Options surveyed ~200 sites undertaking scintigraphy examinations in the major 5 European markets during 2015/16.

The resulting report provides an audit of important fundamentals for these markets, including:-

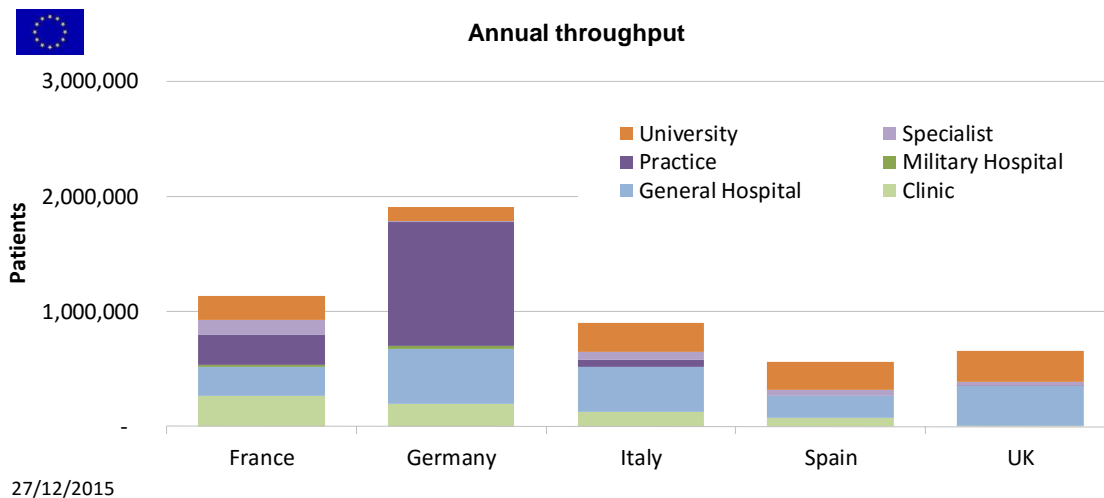
- provision of equipment - scintigraphy and PET/CT
- patient volume - segmented by provider
- mix of studies - segmented by provider
- reimbursement and payment
- market share by supplier by product and by application
- current and future study growth
- Challenge of competing technologies

yielding an up-to-date picture of the status of the European market and providing a valuable reference tool for companies supplying radiotracers and equipment.

This study updates earlier studies undertaken in 4th qtr 2005, 2007 and 2009 and 1<sup>st</sup> qtr 2012 and highlights where usage is changing.

*The nuclear medicine study will contain a subset of information contained within the dedicated PET report.*

Figure 2.7: Total patient throughput - Europe



Source: Medical Options 2015

## Background

In Europe there are ~ 5.5m diagnostic nuclear patient studies performed annually in a market where we estimate radiopharmaceutical sales to be worth ~Euro 400m.

Three major companies supply radiopharmaceuticals to the European market. GE Healthcare, Mallinckrodt and IBA. Additionally there are providers supporting local markets or certain applications. The survey provides an estimate of volume of studies by country and by provider.

**Figure 5.53: Lung perfusion studies**

Perfusion Lung	% Perfusion	Total Perfusion	Centres Reporting	%Centres Perfusion	Centres Perfusion
Clinic	3.60%	11,120	6	100%	52
General Hospital	5.45%	19,828	9	90%	56
Military Hospital	0.00%	0	0		
Practice	6.73%	10,326	3	100%	25
Specialist	1.66%	2,306	2	67%	16
University	7.11%	19,218	5	100%	56
<b>TOTAL</b>	<b>5.08%</b>	<b>62,798</b>	<b>25</b>	<b>93%</b>	<b>205</b>

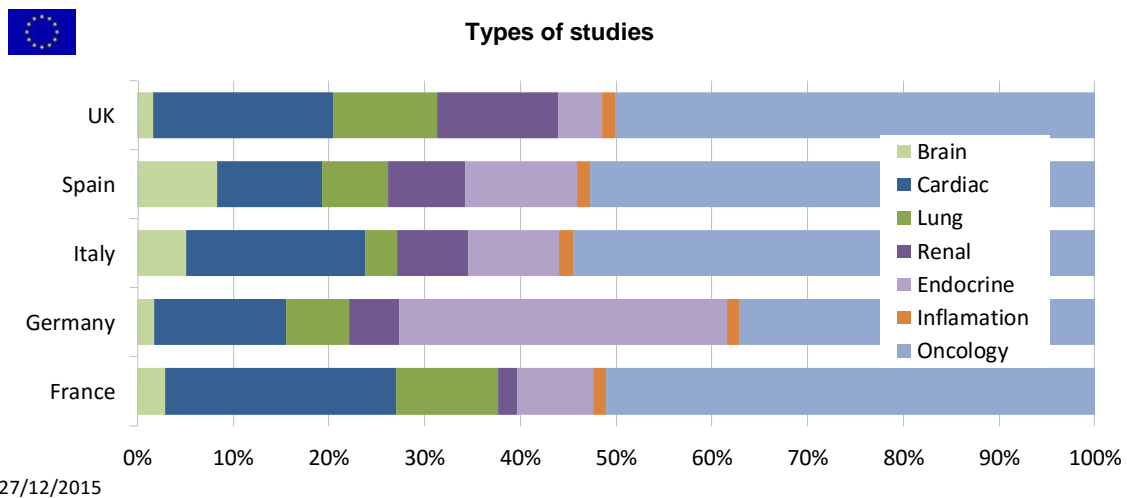
% perfusion shows the proportion of activity accounted for by this application. Total the number of studies. Centres reporting the number of interviews our estimates derive from. The total figure is based on activity in each segment.

29-Dec-15

Source: Medical Options – Survey 2015

Nuclear medicine is fragmented; split between dedicated practitioners and radiologists with an interest in the technique. This leads to considerable heterogeneity between countries although surprisingly a similar pattern of activity is observed.

**Figure 2.10: Examination mix in key European markets**



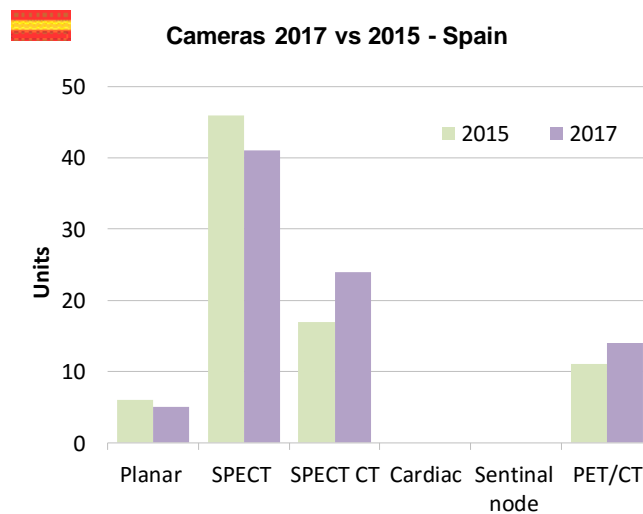
27/12/2015

Source: Medical Options – Survey 2015

The report incorporates respondent's views on how they see nuclear medicine developing in their departments over the next three years. Quantitatively in terms of the number of installed cameras and qualitatively in regard to the number of patients for both diagnostic and therapeutic studies.

In recent years there has been a move in all markets towards SPECT/CT which has resulted in some rationalisation of equipment. This impacts total patient studies as there is limited opportunity for sites to push more patients through existing equipment.

**Figure 8.9: Cameras – future growth**

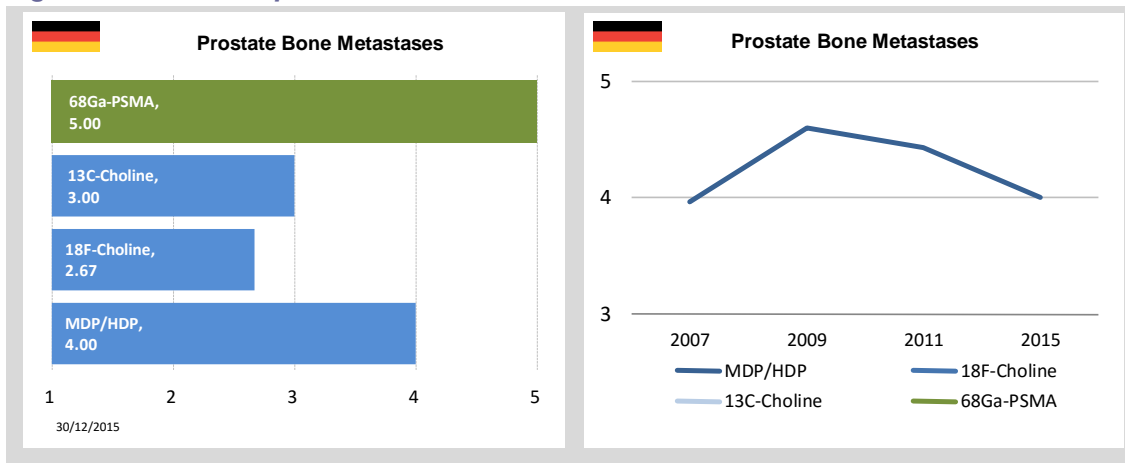


Source: Medical Options – Survey 2015

The availability of alternative methods and the level of promotion of these techniques also has a bearing on respondent's views. The PET agents are available and heavily used in Germany and this may reflect the view of PET versus SPECT.

Understanding how a method is regarded provides an insight into the future use of the agent.

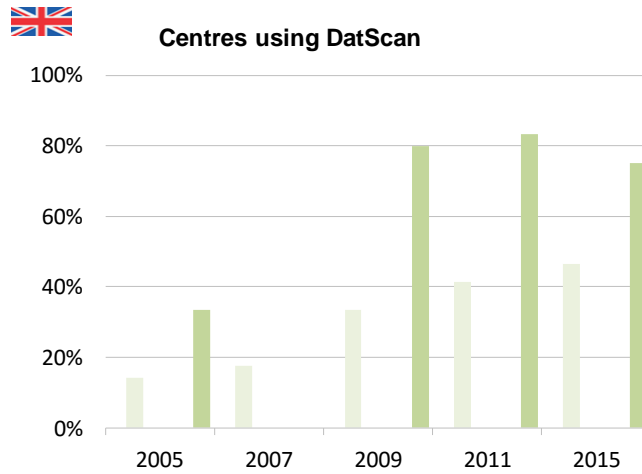
**Figure 6.40/41: Bone prostate studies – view**



Source: Medical Options – Survey 2015

The report tracks the take up of recently released products and the demise of existing products.

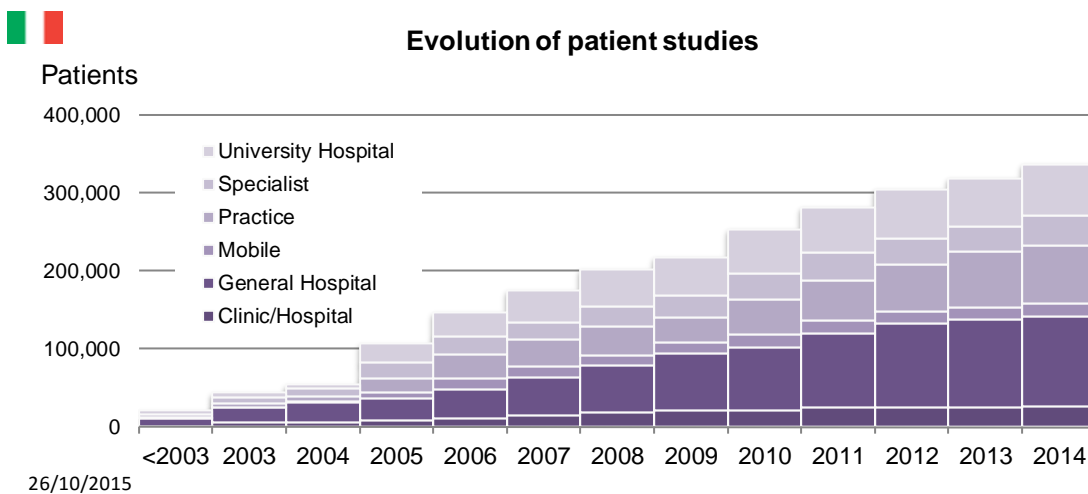
**Figure 9.24: Parkinson's – location**



Source: Medical Options – Survey 2015

The report also reviews the PET/CT studies undertaken in each of the markets using selected extracts from the most recent European PET study to place PET and scintigraphy in perspective. The section provides an overview of the installed base of cameras and cyclotrons in each of the countries as well the types of studies undertaken both using <sup>18</sup>F<sub>FDG</sub> and other agents.

**Figure 7.72: PET Throughput**



Source: Medical Options – Survey 2014

## Contents – typical country chapter

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  - 6.1.2 Providers
    - 6.1.2.1 Private hospital groups
- 6.2 Organisation of Nuclear Medicine**
- 6.3 Reimbursement**
  - 6.3.1 Delivery
    - 6.3.1.1 Hospital practice
    - 6.3.1.2 Outpatients/Ambulant patients
  - 6.3.2 Payment
    - 6.3.2.1 KVen public patients
    - 6.3.2.2 GOÄ private patients
    - 6.3.2.3 Flat fee (Fallpauschalen)
- 6.5 Radiopharmacy**
- 6.6 Diagnostic Patient studies**
  - 6.6.1 Clinical
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- 6.7 PET Studies**
  - 6.7.1 Cameras
  - 6.7.2 Patient Studies

### **Scintigraphy and PET studies**

*Alzheimer's Disease*  
*Parkinson's Disease*  
*Myocardial Viability*  
*Bone mets and orthopaedic*  
*Neuroendocrine tumours*  
*Inflammation*

### **Scintigraphy studies**

*Myocardial Failure*  
*Lung Studies*  
*Renal Studies*  
*Sentinel Node Imaging*

### **What format will the information be provided if we subscribe?**

A consolidated report on the European Nuclear Medicine market by country based on tabulation of the survey responses. Associated commentary will analyse the results with respect to clinical developments. Country/regions analysed:-

- France
- Germany
- Italy
- Spain
- UK

### **What will be the price of this study?**

Contact Us

### **What information will we receive if we subscribe?**

The complete study:-

- tracks the growth of nuclear cameras
- provides an accurate track of the sales of radiopharmaceuticals
- identifies the suppliers of radiopharmaceuticals
- describes the use of products by application and the use of generic and proprietary products.
  - monitors market share by product and by application
  - tracks the growth in examination numbers
  - looks in depth at the types of study being performed and examines how case mix will change in the future.
  - Examines the perception of customers regarding key suppliers

The report is ~270 pages and will contain over 500 tables and charts

### **How will this benefit your business?**

- Enable better use of resources through identifying those segments which are growing, those which are stable and those which are falling.
  - Provides a comprehensive competitive picture.
  - Ensure your sales and marketing spend matches your profile.
  - Allows you to address the European market based on an accurate picture of where it is now and where it is likely to be going in the future.

### **Availability of report**

1<sup>st</sup> qtr 2016



## About Medical Options

We consult in the UK and Europe

Primarily for companies supplying to the acute secondary and tertiary healthcare sectors

And providing a range of information and solutions:-

- **Market research**
  - Sampling the views of customers and patients
    - Their degree of satisfaction
    - Their levels of activity
    - Their future intentions
- **Economic evaluation**
  - Presenting the costs and highlighting the benefits of technologies
- **Health Technology Assessment**
  - Showing value
- **Market modeling**
  - Refining the present
- **Market dynamics**
  - Forecasting the future
- **Market strategies**
  - Developing markets
  - Improving share through better targeting of potential clients

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