

Preclinical Imaging Market is Expected to Account for US\$ 6.6 Bn by 2034, at a CAGR of 5.2% (2024 – 2034); states TNR

Increasing Adoption of Imaging Systems Coupled with the Growing Number of Investments & Funding in R&D is Driving the Global Preclinical Imaging Market

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imaging refers to the use of advanced imaging techniques to visualize, analyse, and quantify biological

processes within living organisms, typically animal models, before the commencement of clinical trials. This field encompasses a diverse range of imaging modalities, including magnetic resonance imaging (MRI), positron emission tomography (PET), computed tomography (CT), and optical imaging, among others. Preclinical imaging plays a crucial role in biomedical research and drug development by providing researchers with detailed insights into disease progression, treatment efficacy, and toxicity profiles of potential therapeutics. By non-invasively capturing dynamic physiological and molecular changes within living systems, preclinical imaging facilitates the identification of promising drug candidates, optimization of treatment strategies, and elucidation of underlying disease mechanisms, ultimately contributing to the advancement of medical science and the development of novel therapies.

One of the primary demand drivers for preclinical imaging is the escalating need for comprehensive evaluation and validation of novel therapeutic interventions in biomedical research. With the increasing complexity of diseases and the emergence of precision medicine approaches, researchers rely heavily on preclinical imaging to gain insights into disease mechanisms, treatment responses, and potential adverse effects in living organisms, typically animal models. Advanced imaging modalities such as magnetic resonance imaging (MRI), positron emission tomography (PET), and computed tomography (CT) offer non-invasive, high-resolution visualization of anatomical, functional, and molecular changes, facilitating the identification of promising drug candidates and optimization of treatment regimens.

Additionally, stringent regulatory requirements for drug approval mandate thorough preclinical assessment, further driving the demand for advanced imaging technologies to ensure the safety

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and efficacy of pharmaceutical interventions.

The initial investment in purchasing equipment such as MRI, PET, or CT scanners, along with ongoing expenses for maintenance, upgrades, and skilled personnel, can pose substantial financial burdens, particularly for smaller research institutions and companies. Additionally, the complexity of interpreting imaging data and the need for specialized training may limit widespread adoption, further constraining the market. Moreover, regulatory hurdles and ethical considerations regarding the use of animal models in preclinical studies can pose challenges, potentially impeding the pace of research and innovation in the field. Overcoming these restraints requires concerted efforts to enhance cost-effectiveness, streamline regulatory processes, and promote collaboration among stakeholders to ensure the continued advancement of preclinical imaging technologies.

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Global Preclinical Imaging Market: Key Inclusions

Imaging systems segment is projected as the fastest growing segment in the Preclinical Imaging market over the forecasted period (2024-2034). Imaging systems are fundamental demand drivers in the realm of preclinical imaging, serving as indispensable tools for researchers in understanding biological processes and evaluating potential therapeutics. These systems encompass a diverse array of technologies, including MRI, PET, CT, and optical imaging, each offering unique capabilities for visualizing anatomical, functional, and molecular features in animal models. The continuous evolution and enhancement of imaging systems, driven by technological innovation and research demands, further fuel the demand for preclinical imaging. Researchers rely on these systems to generate high-resolution, real-time data crucial for advancing drug discovery and development processes. Additionally, the versatility and non-invasiveness of imaging systems make them invaluable assets in preclinical research, enabling longitudinal studies and facilitating the translation of findings into clinical applications. As the complexity of biomedical research grows, so does the demand for advanced imaging systems, driving ongoing innovation in preclinical imaging methodologies.

Academic and research segment in the Preclinical Imaging market is Projected as the Fastest Growing Segment. Academic and research centers serve as pivotal drivers of the demand for preclinical imaging, fuelling innovation and advancing scientific knowledge. These institutions heavily rely on cutting-edge imaging technologies such as MRI, PET, and CT to conduct comprehensive preclinical studies aimed at elucidating disease mechanisms and evaluating potential therapeutic interventions. The pursuit of novel treatments for a wide range of diseases, coupled with the need for robust preclinical validation, underscores the importance of advanced imaging capabilities in academic and research settings. Furthermore, collaborations between academia, industry, and government agencies facilitate the exchange of expertise and resources, further propelling the demand for preclinical imaging solutions. As academic and research centers continue to play a central role in pushing the boundaries of biomedical research, the

demand for sophisticated imaging technologies is expected to remain strong, driving further advancements in preclinical imaging methodologies.

Asia-Pacific region in the preclinical imaging market is Projected as the fastest growing region. The demand for preclinical imaging in the Asia-Pacific region is propelled by rapid advancements in healthcare infrastructure and increased investment in biomedical research. Countries like China, Japan, and India are significantly boosting their research capabilities, fostering the need for advanced imaging technologies such as MRI, PET, and CT. The rising prevalence of chronic diseases and the growing aging population in this region further drive the need for detailed preclinical studies to develop effective treatments. Additionally, supportive government policies and increased funding for R&D initiatives enhance the adoption of sophisticated preclinical imaging techniques. This regional growth is also fueled by collaborations between academic institutions and industry players, aiming to accelerate drug development and improve healthcare outcomes.

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Global Preclinical Imaging Market Key Players:

- Agilent Technologies
- Bruker Corporation
- General Electric (GE)
- Mediso Ltd.
- MILabs B.V.
- Molecubes
- MR Solutions
- PerkinElmer, Inc.
- Siemens A.G.
- TriFoil Imaging
- VisualSonics Inc. (Fujifilm)
- Other Industry Participants

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Global Preclinical Imaging Market

Global Preclinical Imaging Market Product Type Outlook (Revenue, USD Million, 2016 - 2034)

- Imaging systems
 - o Optical imaging systems
 - Bioluminescence imaging systems
 - Fluorescence imaging systems
 - Other optical imaging systems
 - o Nuclear imaging systems
 - micro-pet imaging systems

- Standalone pet imaging systems
- Pet/CT imaging systems
- Pet/MRI imaging systems
- Micro-spect imaging systems
- standalone spet imaging systems
- spet/ct imaging systems
- spet/ MRI imaging systems
- Trimodality (spect/pet/ct) imaging systems
- o Micro-MRI systems
- o Micro-ultrasound systems
- o Micro-ct systems
- o Photoacoustic imaging systems
- o Magnetic particle imaging (mpi) systems
- Reagents
- o Preclinical optical imaging reagents
- o Preclinical bioluminescent imaging reagents
- Luciferins
- Coelenterazine
- Furimazine
- o Preclinical fluorescent imaging reagents
- Green fluorescent proteins
- Red fluorescent proteins
- Infrared dyes
- o Preclinical nuclear imaging reagents
- Preclinical pet tracers
- Fluorine-18-based preclinical pet tracers
- Carbon-11-based preclinical pet tracers
- Copper-64-based preclinical pet tracers
- Other pet tracers
- Preclinical spect probes
- Technetium-99m-based preclinical spect probes
- Iodine-131-based preclinical spect probes
- Gallium-67-based preclinical spect probes
- Thallium-201-based preclinical spect probes
- Other spect probes
- o Preclinical MRI contrast agents
- Gadolinium-based preclinical contrast agents
- Iron-based preclinical contrast agents
- Manganese-based preclinical contrast agents
- o Preclinical ultrasound contrast agents
- o Preclinical CT contrast agents
- Iodine-based preclinical ct contrast agents
- Barium-based preclinical ct contrast agents

- Gold nanoparticles
- Gastrografin-based preclinical ct contrast agents
- Software

Global Preclinical Imaging Market Application Outlook (Revenue, USD Million, 2016 - 2034)

- Oncology
- Cardiology
- Neurology
- Infectious diseases
- Immunology & inflammation
- Other Applications

Global Preclinical Imaging Market End User Outlook (Revenue, USD Million, 2016 - 2034)

- Pharmaceutical & biotechnology companies
- Academic & research centers
- Imaging centers
- Other end users

Global Preclinical Imaging Market Regional Outlook (Revenue, USD Million, 2016 - 2034)

- North America (U.S., Canada, Mexico, Rest of North America)
- Europe (France, The UK, Spain, Germany, Italy, Nordic Countries (Denmark, Finland, Iceland, Sweden, Norway), Benelux Union (Belgium, The Netherlands, Luxembourg), Rest of Europe)
- Asia Pacific (China, Japan, India, New Zealand, Australia, South Korea, Southeast Asia (Indonesia, Thailand, Malaysia, Singapore, Rest of Southeast Asia), Rest of Asia Pacific)
- Middle East & Africa (Saudi Arabia, UAE, Egypt, Kuwait, South Africa, Rest of Middle East & Africa)
- Latin America (Brazil, Argentina, Rest of Latin America)

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