

# North America Pre-clinical Scientific Research Medical Device Market Size, Share & Trends Analysis Report By Product, By Animal Model (Rodents, Rabbits, Non-human Primates), By Application, By Customer, By Country, And Segment Forecasts, 2026 - 2033

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## Abstracts

The North America pre-clinical scientific research medical device market size was estimated at USD 14.90 billion in 2025 and is projected to reach USD 23.38 billion by 2033, growing at a CAGR of 5.92% from 2026 to 2033. The market growth is mainly due to rising pre-clinical R&D spending by medical device companies, stringent regulatory and safety requirements and technological advancements and shift toward translational research models.

North America pre-clinical scientific research medical device industry is expanding rapidly, driven by rising R&D investments from medical device manufacturers, particularly in the U.S., which leads the global spending. Besides this, strong venture capital, private funding, and NIH grants support innovation. For instance, in January 2026, WashU Medicine reported USD 1.7 billion in startup funding, accelerating early-stage research and increasing demand for pre-clinical devices. These investments enable rapid development of diagnostics, therapeutics, and medical technologies requiring advanced imaging, monitoring, and in vitro diagnostic tools. In addition, the NIH's USD 47 billion 2024 budget supports translational research, reduces financial risk, and boosts adoption of specialized pre-clinical instrumentation, driving market expansion.

In addition, regulatory authorities, particularly the U.S. FDA, require comprehensive preclinical evidence to demonstrate safety, functionality, and biocompatibility before clinical trials or market approval, especially for high-risk and AI-enabled devices. These

stringent standards compel companies to invest in advanced imaging systems, monitoring platforms, dosing equipment, and validated IVD tools to generate reliable, regulator-acceptable data. For instance, in April 2025, FDA introduced a roadmap promoting New Approach Methodologies alongside animal studies, further elevating expectations for data quality and reproducibility. Similarly, manufacturers are adopting sophisticated preclinical technologies, positioning regulatory compliance as a key driver of market growth and innovation.

Furthermore, technological advancements in imaging, analytics, automation, and data integration are transforming pre-clinical research workflows and driving demand for advanced scientific research devices. In addition, high-resolution small-animal imaging, automated monitoring, precision dosing systems, and integrated IVD tools enhance accuracy, reproducibility, and longitudinal data generation. As devices grow more complex, multifunctional and AI-enabled platforms support deeper biological insights and faster regulatory decision-making. Besides this, leading companies are accelerating innovation. For instance, in 2025, Revvity launched Living Image Synergy AI software to streamline multimodal imaging analysis, whereas Thermo Fisher introduced award-winning analytical technologies improving precision, throughput, and automation. These innovations are expanding investment and adoption across research institutions and industry.

## North America Pre-clinical Scientific Research Medical Device Market Report Segmentation

This report forecasts revenue growth at regional and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the North America pre-clinical scientific research medical device market report based on product, animal model, application, customer, and country.

### Product Outlook (Revenue, USD Million, 2021 - 2033)

#### Pre-clinical IVD Systems & Reagents

Hematology Analyzers

Clinical Chemistry Analyzers

Immunoassay Platforms

Molecular Diagnostics

Others

## Pre-clinical Medical Imaging Systems

Optical Imaging

Magnetic Resonance Imaging (MRI)

Positron Emission Tomography (PET)

Single Photon Emission Computed Tomography (SPECT)

Computed Tomography (CT)

Ultrasound Imaging (US)

Photoacoustic Imaging (PAI)

Hybrid Imaging Systems

Imaging Microscopes

Endoscopes

Others

## Animal Patient Monitoring & Life Support Systems

Multiparameter Monitoring Systems

Physiology Monitoring Devices

Anesthesia Machines & Vaporizers

Ventilators & Respiratory Support

Infusion, Syringe & Precision Pumps

Temperature Management Systems

Data Collection & Acquisition Systems

Others

Animal Housing & Husbandry Systems

Housing Cages

Watering & Feeding Systems

Rack & Cage Ventilation Systems

Others

Pre-clinical Surgical Systems & Accessories

Stereotaxic Surgery Systems

Surgical Instruments & Toolkits

Surgical Lasers

Surgical Microscopes & Magnification Tools

Surgical Tables & Stabilization Systems

Optical & Illumination Systems

Warming Plates & Heating Pads

Others

Microinjection, Dosing & Sampling Systems

Microinjection Pumps & Osmotic Pumps

Sampling Devices

Valves, Tubing & Precision Delivery Accessories

Vascular Access Devices

Injection Systems (Manual, Automated)

Others

Pre-clinical Interventional Devices

Catheters & Microcatheters

Guidewires

Minimally Invasive Surgical Tools

Balloon & Vascular Tools

Others

Euthanasia Systems

Consumables

Others

Animal Model Outlook (Revenue, USD Million, 2021 - 2033)

Rodents

Rabbits

Non-Human Primates

Others

Application Outlook (Revenue, USD Million, 2021 - 2033)

Oncology

Neurology

Cardiovascular Diseases

Infectious Diseases

Metabolic Disorders

Others

Customer Outlook (Revenue, USD Million, 2021 - 2033)

Pharmaceutical & Biopharmaceutical Companies

Preclinical CROs & Contract Laboratories

Academic & Research Institutions

Others

Country Outlook (Revenue, USD Million, 2021 - 2033)

U.S.

Canada

**This report can be delivered to the clients within 2 Business Days**

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