

Preclinical Imaging (In-VIVO) Market by Modality (Optical Imaging, PET, SPECT, CT, MRI, ultrasound, Photoacoustic Imaging, Magnetic Particle Imaging), Reagent (Optical Imaging Reagents, Contrast Agents, PET Tracers, SPECT Probes) - Global Forecast to 2021

<https://marketpublishers.com/r/PC4E5F81066EN.html>

Date: August 2016

Pages: 165

Price: US\$ 5,650.00 (Single User License)

ID: PC4E5F81066EN

Abstracts

The global preclinical imaging market is estimated to grow at a high CAGR of 6.2% during 2016-2021; and is expected to be valued at USD 910.4 million by 2021. Although the mature markets (North America and Europe) held large share of preclinical imaging market in 2015; Asia-Pacific region is poised to be the fastest growing region during next five years. Factors such as continuous government support for pharmaceutical and biotechnology R&D, increasing public-private investments to support radioisotope production, rising number of translational research activities, and evolving regulatory scenario across major Asian countries are propelling the growth of the preclinical imaging market in Asia-Pacific region.

Market growth in the global preclinical imaging market is mainly driven by factors such technological advancements in the field of molecular imaging, increasing market demand for non-invasive small animal imaging techniques, and growing number of public-private initiatives and funding to support preclinical researches. In addition, emerging markets (such as China and India) are offering new growth opportunities for preclinical imaging market players.

Geographically, North America is estimated to command the largest share of the global preclinical imaging market in 2016, followed by Europe. The large market share of the North American region can be attributed to the robust R&D infrastructure for life science researches, fast adoption of novel molecular imaging technologies, significant presence of pharmaceutical and biotechnology companies, and increasing preference of end

users for multimodality systems. However, continued outsourcing of in-house preclinical studies to emerging countries by U.S.-based pharmaceutical and biotechnology companies and reduced R&D expenditure by the Canadian government to support research studies are negatively affecting the growth of the preclinical imaging market in this region.

The preclinical imaging market is fairly competitive, with a large number of global and local manufacturers of preclinical imaging solutions. PerkinElmer, Inc. (U.S.), Bruker Corporation (U.S.), and FUJIFILM Holding Corporation (Japan) were the top three players in the preclinical imaging market in 2015. These companies together accounted for a share of 63.2% of the global preclinical imaging market in 2015. New product launches and product enhancements; geographic expansions; and partnerships, agreements, and collaborations are the major strategies adopted by most of the market players to achieve growth in the preclinical imaging market.

Report Objective:

This report studies preclinical imaging market based on modality and reagents; utilized for the assessment of anatomical, physiological, and functional parameters at molecular and cellular levels in live animal models. These imaging systems and reagents are applied to visualize living animals during preclinical research studies in order to assess the safety and efficacy of novel drug procedures or other medical treatments for human applications.

The report also studies, the factors (such as drivers, restraints, opportunities, and challenges) which affect the market growth in positive and negative manner. It analyzes opportunities and challenges in the market for stakeholders and provides details of the competitive landscape for market leaders. Furthermore, the preclinical imaging market report analyzes the micromarkets with respect to their individual growth trends, future prospects, and contributions to the total market.

Detailed Segmentation:

Preclinical Imaging Market, by Modality

Optical Imaging Systems

Bioluminescence/Fluorescence Imaging Systems

Standalone Fluorescence Imaging Systems

Optical + X-Ray/Optical + CT

Preclinical Nuclear Imaging Systems

Micro-PET Systems

Micro-SPECT Systems

Trimodality (SPECT/PET/CT) Systems

Micro-MRI Systems

Micro-Ultrasound Systems

Micro-CT Systems

Preclinical Photoacoustic Imaging Systems

Preclinical Magnetic Particle Imaging (MPI) Systems

Preclinical Imaging Market, by Reagents

Preclinical Optical Imaging Reagents

Bioluminescent Imaging Reagents

Fluorescent Imaging Reagents

Preclinical Nuclear Imaging Reagents

Preclinical PET Tracers

Preclinical SPECT Probes

Preclinical MRI Contrast Agents

Gadolinium-based Preclinical MRI Contrast Agents

Iron-based Preclinical MRI Contrast Agents

Manganese-based Preclinical MRI Contrast Agents

Preclinical Ultrasound Contrast Agents

Preclinical CT Contrast Agents

Iodine-based Preclinical CT Contrast Agents

Barium-based Preclinical CT Contrast Agents

Gold Nanoparticles

Gastrografin-based Preclinical CT Contrast Agents

Preclinical Imaging Market, by Region

North America

Europe

Asia-Pacific

Rest of the World

Key Target Audience:

Preclinical Imaging Instrument Manufacturers, Suppliers, and Imaging Software Providers

Pharmaceutical and Biotechnology Companies

Preclinical Imaging Reagent Manufacturers and Suppliers

Contract Research Organizations (CROs)

Research and Development (R&D) Companies

Government Research Laboratories

Independent Research Laboratories

Government and Independent Regulatory Authorities

Market Research and Consulting Service Providers

Medical Research Laboratories

Academic Medical Institutes and Universities

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About

The report “Pre-Clinical Imaging (In-VIVO) Market by Systems and Reagents (Optical Imaging, Micro-PET, Micro-SPECT, Micro-MRI, Micro-ultrasound, Computed Tomography, Photo Acoustic Imaging, Magnetic Particle Imaging, Multimodality Imaging).

This report studies the global preclinical imaging market over the forecast period of 2014 to 2019. The market is expected to reach \$797 million by 2019, at CAGR of 6.0% from 2014 to 2019.

Aspect Imaging (Israel), Biospace Lab S.A. (France), Bruker Corporation (U.S.), LI-COR Biosciences (U.S.), Mediso Ltd. (Hungary), MILabs B.V. (Netherlands), MR Solutions Ltd (U.K.), PerkinElmer, Inc. (U.S.), TriFoil Imaging (U.S.), and FUJIFILM VisualSonics, Inc. (Canada) are the key players operating in the global preclinical imaging systems and reagents market.

A number of factors such as technological advancements in molecular imaging modalities, rising adoption of multi-modality imaging systems in preclinical research studies, and growing acceptance of preclinical imaging in drug discovery and development processes are fuelling the demand of preclinical imaging systems and reagents. On the other hand, declining NIH budgets for medical science research studies and high implementation cost of sophisticated preclinical imaging systems are restricting the growth of the global preclinical imaging market.

As of 2014, North America holds the largest share of the global preclinical imaging market, followed by Europe. However, the Asia-Pacific market is expected to grow at the highest CAGR of 8.2% from 2014 to 2019. A number of factors, including rising R&D activities by big pharma and biotech companies in developing nations, increased government funding for development of pharmaceutical industry, and growing number of CROs in emerging markets are stimulating the growth of the preclinical imaging market in the Asia-Pacific region. However, challenges associated with the application of radioisotopes, such as short half-life of PET radioisotopes and high cost involved in the generation of these isotopes, restricts the demand for micro-PET systems in developing Asian countries.

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