

# **Clinical Trial Imaging Market Forecast to 2028 - COVID-19 Impact and Global Analysis By Modality [Tomography, Magnetic Resonance Imaging (MRI), Ultrasound, Positron Emission Tomography (PET), X-Ray, Echocardiography, and Others], Offering (Operational Imaging Services, Imaging Software, Read Analysis Services, Trial Design and Consulting Services, and Others), and End User [Contract Research Organizations (CROs), Pharmaceutical and Biotechnology Companies, Academic and Research Institutes, and Others]**

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## **Abstracts**

The clinical trial imaging market size is expected to reach US\$ 2.48 billion by 2028 from US\$ 1.61 billion in 2022; it is estimated to record a CAGR of 7.6% from 2023 to 2028.

**Spur in Number of CROs Offering Medical Imaging Services Bolsters Market Growth**

Clinical research organizations (CROs) assist in the successful implementation of clinical trials through the services offered using high-quality facilities and deep subject matter expertise. CROs have become the backbone of the clinical trial industry due to their efficient and cost-effective operations that benefit trial sponsors. For example, on an average, CROs take 30% lesser time than in-house activity to conduct and complete clinical trials.

With the rising number of CROs, leading to high competition, some of these businesses

offer specialized imaging services, thus emerging as imaging CROs (iCROs). Keosys Medical Imaging and Medica Group PLC are the examples of iCROs. The total number of clinical trials has doubled since 2010, and the use of imaging modalities in these trials has increased by almost 500%. Per a report by KEOSYS MEDICAL IMAGING company, iCROs allocate 7.5–10% of their budgets for imaging, which helps them optimize their workflow to manage every step of the process, from image acquisition to interpretation. These CROs offer key knowledge insights in areas such as site qualification for imaging, acquisition of standardized images, and determination of read designs and criteria, thereby contributing to the growth of the overall clinical trial imaging market.

## Market Opportunity

### In-Silico Imaging Clinical Trials to Provide Market Opportunities in Coming Years

According to a 2023 report by the SPIE, clinical trials are expensive and lengthy, which causes delays in regulatory evaluation and significantly affects patients' access to novel and high-quality pharmaceutical products. In-silico imaging is employed in the evaluation of safety and effectiveness of imaging technologies with less burden than clinical trials as they provide minimal errors. In-silico imaging in clinical trials aid in the computer simulation of an entire imaging system/its components (source, object, task, observer components, etc.), which assists in research, development, optimization, technology assessment, and regulatory evaluation.

In-silico imaging trials are vital in evaluating new medical imaging systems. In March 2019, the Virtual Imaging Clinical Trial for Regulatory Evaluation (VICTRE) was conducted using computer-simulated imaging of 2,986 in-silico patients for comparing digital mammography and digital breast tomosynthesis. Incorporating in-silico trials improved lesion detection performance, favoring tomosynthesis for all breast sizes and lesion types. Findings of VICTRE reveal that in-silico imaging trials and computer simulation imaging tools are likely to be viable sources of evidence in the regulatory evaluation of imaging devices, in turn, providing lucrative opportunities for the growth of the clinical trial imaging market.

China held the largest share of the clinical trial imaging market in Asia Pacific in 2022, and it is expected to register a CAGR of 8.6% during the forecast period. The growth of the market in China is primarily attributed to the established pharmaceutical market, increasing R&D expenditures by the pharmaceutical and biopharmaceutical companies, rising number of clinical trials due to lower cost, and favorable regulatory policies. China

has the world's second largest pharmaceutical market. The excessive population in China, coupled with the prevalence of various communicable and non-communicable diseases, are the key factors favoring the growth of the pharmaceutical companies in China.

Key players in the clinical trial imaging market secure growth through various strategies. In January 2022, Clario, a technology company that delivers solutions for clinical trials, and XingImaging, a radiopharmaceutical production and positron emission tomography company, expanded their partnership to deliver PET imaging clinical trials for testing novel therapeutics in China.

The National Institute for Health Research's Clinical Research Network, the Centers for Disease Control and Prevention (CDC), South Australian Health and Medical Research Institute, Exploratory Oncology Research & Clinical Trial Center, and Therapeutic Goods Administration (TGA) are a few key primary and secondary sources referred to while preparing the report on the clinical trial imaging market.

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