

**Clinical Trial Imaging Market by Software & Service (Operational Imaging, Trial Design), Modality (CT, MRI, X-Ray, PET, Ultrasound, ECHO), Therapeutic Area (Infectious, Oncology, CNS, CVD), End User (Pharma, Biotech, CROs) & Region - Global Forecast to 2028**

Market Report | 2023-08-18 | 175 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The global clinical trial imaging market is projected to reach USD 1.9 billion by 2028 from USD 1.3 billion in 2023, at a CAGR of 7.8% during the forecast period. The market's expansion is propelled by factors including the expansion of the pharmaceutical and biotechnology sectors, escalated research and development investments, and the proliferation of Contract Research Organizations (CROs). On the other hand, the high implementation cost of the imaging system and high cost of clinical trials are the major factors hindering the growth of this market during the forecast period.

"The service segment accounted for the highest growth rate in the clinical trial imaging market, by service & software, during the forecast period"

The clinical trial imaging market is segmented into services and software based on product. In 2022, the service segment accounted for the highest growth rate in the clinical trial imaging market. Based on type, the services segment is further classified into operational imaging services, reader analysis services, system & technical support services, and trial design consulting services. The growth of this segment is primarily attributed to the rising R&D spending, expanding clinical trials, and the demand for new disease treatment and diagnostics.

"Medical device manufacturers segment accounted for the highest CAGR"

Based on end user, the clinical trial imaging market is segmented into pharmaceutical companies, biotechnology companies, medical devices manufacturers, contract research organizations, academic and government research institutes, and other end users. In 2022, the medical device manufacturers segment accounted for the highest growth rate. This can be attributed to the increasing R&D expenditure and R&D activities by medical device manufacturers and the expanding medical devices market are

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

the primary growth drivers of the medical device manufacturers segment.

"Asia Pacific: The fastest-growing region clinical trial imaging market"

The global clinical trial imaging market is segmented into North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. The Asia Pacific region is projected to register the highest CAGR during the forecast period. The surge in research and development investments and the growing inclination towards outsourcing pharmaceutical research to emerging Asian nations are the pivotal catalysts propelling the market's expansion.

The primary interviews conducted for this report can be categorized as follows:

-□By Company Type: Tier 1 - 40%, Tier 2 - 30%, and Tier 3 - 30%

-□By Designation: C-level - 27%, D-level - 18%, and Others - 55%

-□By Region: North America - 51%, Europe - 21%, Asia Pacific - 18%, Latin America - 6%, and the Middle East & Africa - 4%

Prominent companies are ICON plc. (Ireland), BioTelemetry Inc. (US), Biomedical Systems Corporation (US), Medpace Holdings, Inc. (US), IXICO plc. (UK), Resonance Health Ltd. (Australia), Radiant Sage LLC. (US), BioClinica Inc. (US), Intrinsic Imaging LLC. (US), Cardiovascular Imaging Technologies LLC. (US), Medical Metrics Inc. (US), Prism Clinical Imaging, Inc. (US), Boston Imaging Core Lab LLC. (US), anagram 4 clinical trials (Spain), Lyscaut Medical Imaging Company (Belgium), Calyx Group (UK), Bioseptive Inc. (Canada), ProScan Imaging LLC. (US), Micron Inc. (Japan), Imaging Endpoints LI, LLC (US), Perspectum Ltd. (UK), Pharmtrace klinische Entwicklung GmbH (Germany), WorldCare Clinical, LLC (US), Median Technologies (France) and Invicro. LLC. (US).

Research Coverage:

This research report categorizes the clinical trial imaging market by service & software, modality, therapeutic area, end user and region. The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the clinical trial imaging market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, and services; key strategies; Contracts, partnerships, agreements, new product & service launches, mergers and acquisitions, and recent developments associated with the clinical trial imaging market. Competitive analysis of upcoming startups in the clinical trial imaging market ecosystem is covered in this report.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants by providing them with the closest approximations of the revenue numbers for the overall clinical trial imaging market and its subsegments. It will also help stakeholders better understand the competitive landscape and gain more insights to better position their business and make suitable go-to-market strategies. This report will enable stakeholders to understand the market's pulse and provide them with information on the key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

-□Analysis of key drivers, restraints, opportunities, and challenges influencing the growth of the clinical trial imaging market.

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the clinical trial imaging market.

-□Market Development: Comprehensive information about lucrative markets - the report analyses the clinical trial imaging market across varied regions.

-□Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the clinical trial imaging market.

-□Competitive Assessment: In-depth assessment of market ranking, growth strategies and service offerings of leading players like ICON plc. (Ireland), BioTelemetry Inc. (US), Biomedical Systems Corporation (US), and Medpace Holdings, Inc. (US), among others in the clinical clinical trial imaging market strategies.

## Table of Contents:

1□INTRODUCTION□25

1.1□STUDY OBJECTIVES□25

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.2	MARKET DEFINITION	25
1.2.1	INCLUSIONS AND EXCLUSIONS	25
1.2.2	MARKETS COVERED	26
FIGURE 1	CLINICAL TRIAL IMAGING MARKET SEGMENTATION	26
1.2.3	GEOGRAPHIC SCOPE	27
1.2.4	YEARS CONSIDERED	27
1.2.5	CURRENCY CONSIDERED	28
1.3	LIMITATIONS	28
1.4	STAKEHOLDERS	28
1.5	SUMMARY OF CHANGES	29
1.5.1	RECESSION IMPACT	29
2	RESEARCH METHODOLOGY	30
2.1	RESEARCH DATA	30
2.2	RESEARCH APPROACH	30
FIGURE 2	CLINICAL TRIAL IMAGING MARKET: RESEARCH DESIGN	30
2.2.1	SECONDARY DATA	30
2.2.1.1	Key data from secondary sources	31
2.2.2	PRIMARY DATA	32
FIGURE 3	BREAKDOWN OF INTERVIEWS: SUPPLY AND DEMAND SIDE	32
2.2.2.1	Key data from primary sources	33
2.2.2.2	Key industry insights	34
2.2.2.3	Breakdown of primary interviews	34
FIGURE 4	BREAKDOWN OF PRIMARY INTERVIEWS: SUPPLY AND DEMAND-SIDE PARTICIPANTS	34
FIGURE 5	BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION	35
2.3	MARKET SIZE ESTIMATION	35
2.3.1	BOTTOM-UP APPROACH	36
2.3.1.1	Approach 1: Company revenue estimation approach	36
FIGURE 6	BOTTOM-UP APPROACH: COMPANY REVENUE ESTIMATION APPROACH	36
2.3.1.2	Approach 2: Presentations of companies and primary interviews	36
2.3.1.3	Growth forecast	37
2.3.1.4	CAGR projections	37
FIGURE 7	CAGR PROJECTIONS: SUPPLY-SIDE ANALYSIS	37
2.3.2	TOP-DOWN APPROACH	38
FIGURE 8	CLINICAL TRIAL IMAGING MARKET: TOP-DOWN APPROACH	38
2.4	MARKET BREAKDOWN & DATA TRIANGULATION	39
FIGURE 9	DATA TRIANGULATION METHODOLOGY	39
2.5	STUDY ASSUMPTIONS	40
2.6	RISK ASSESSMENT	40
2.7	LIMITATIONS	41
2.8	CLINICAL TRIAL IMAGING MARKET: RECESSION IMPACT	41
3	EXECUTIVE SUMMARY	43
FIGURE 10	CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2023 VS. 2028 (USD MILLION)	43
FIGURE 11	CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2023 VS. 2028 (USD MILLION)	44
FIGURE 12	CLINICAL TRIAL IMAGING MARKET, BY THERAPEUTIC AREA, 2023 VS. 2028 (USD MILLION)	45
FIGURE 13	CLINICAL TRIAL IMAGING MARKET, BY END USER, 2023 VS. 2028 (USD MILLION)	46
FIGURE 14	CLINICAL TRIAL IMAGING MARKET, BY REGION, 2023 VS. 2028 (USD MILLION)	47
4	PREMIUM INSIGHTS	48

4.1	CLINICAL TRIAL IMAGING MARKET OVERVIEW	48
	FIGURE 15	RIISING R&D SPENDING TO DRIVE MARKET GROWTH
4.2	CLINICAL TRIAL IMAGING MARKET SHARE, BY SERVICE & SOFTWARE, 2022 VS. 2028	48
	FIGURE 16	SERVICES TO HOLD LARGEST MARKET SHARE TILL 2028
4.3	CLINICAL TRIAL IMAGING MARKET SHARE, BY MODALITY, 2023 VS. 2028	49
	FIGURE 17	COMPUTED TOMOGRAPHY TO COMMAND LARGEST SHARE OVER FORECAST PERIOD
4.4	CLINICAL TRIAL IMAGING MARKET SHARE, BY THERAPEUTIC AREA, 2023 VS. 2028	49
	FIGURE 18	ONCOLOGY TO DOMINATE MARKET, BY THERAPEUTIC AREA, TILL 2028
4.5	CLINICAL TRIAL IMAGING MARKET SHARE, BY END USER, 2023 VS. 2028	50
	FIGURE 19	PHARMACEUTICAL COMPANIES TO RETAIN MARKET LEADERSHIP OVER FORECAST PERIOD
4.6	CLINICAL TRIAL IMAGING MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES	50
	FIGURE 20	ASIA PACIFIC TO REGISTER HIGHEST GROWTH RATE TILL 2028
5	MARKET OVERVIEW	51
5.1	INTRODUCTION	51
5.2	MARKET DYNAMICS	51
	FIGURE 21	CLINICAL TRIAL IMAGING MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES
5.2.1	DRIVERS	52
5.2.1.1	Increasing R&D spending	52
5.2.1.2	Growth of pharmaceutical and biotechnology industries	52
5.2.1.3	Increasing number of CROs	52
5.2.2	RESTRAINTS	53
5.2.2.1	High implementation cost of imaging systems	53
5.2.3	OPPORTUNITIES	53
5.2.3.1	Growth opportunities in emerging economies	53
5.2.3.2	Development of innovative imaging modalities, contrast agents, molecular probes, and radiopharmaceuticals	53
5.2.4	CHALLENGES	54
5.2.4.1	High cost of clinical trials	54
5.3	PRICING ANALYSIS	54
	TABLE 1	PRICES OF CLINICAL TRIAL IMAGING PRODUCTS (2022)
5.4	PATENT ANALYSIS	55
5.5	TRADE ANALYSIS	55
5.5.1	TRADE ANALYSIS FOR X-RAY APPARATUSES	55
	TABLE 2	IMPORT DATA FOR X-RAY APPARATUSES, BY COUNTRY, 2018-2022 (USD MILLION)
	TABLE 3	EXPORT DATA FOR X-RAY APPARATUSES, BY COUNTRY, 2018-2022 (USD MILLION)
5.5.2	TRADE ANALYSIS FOR CT APPARATUSES	56
	TABLE 4	IMPORT DATA FOR CT APPARATUSES, BY COUNTRY, 2018-2022 (USD MILLION)
	TABLE 5	EXPORT DATA FOR CT APPARATUSES, BY COUNTRY, 2018-2022 (USD MILLION)
5.6	VALUE CHAIN ANALYSIS	57
	FIGURE 22	CLINICAL TRIAL IMAGING MARKET: VALUE CHAIN ANALYSIS
5.7	SUPPLY CHAIN ANALYSIS	58
	FIGURE 23	CLINICAL TRIAL IMAGING MARKET: SUPPLY CHAIN ANALYSIS
5.8	ECOSYSTEM ANALYSIS	59
	FIGURE 24	CLINICAL TRIAL IMAGING MARKET: ECOSYSTEM ANALYSIS
	TABLE 6	COMPANY ROLE IN ECOSYSTEM
5.9	PORTER'S FIVE FORCES ANALYSIS	61
	TABLE 7	CLINICAL TRIAL IMAGING MARKET: PORTER'S FIVE FORCES ANALYSIS
5.9.1	THREAT OF NEW ENTRANTS	61

5.9.2	THREAT OF SUBSTITUTES	61
5.9.3	BARGAINING POWER OF BUYERS	61
5.9.4	BARGAINING POWER OF SUPPLIERS	61
5.9.5	DEGREE OF COMPETITION	61
5.10	PESTLE ANALYSIS	62
5.11	REGULATORY LANDSCAPE	62
5.11.1	NORTH AMERICA	62
5.11.1.1	US	62
5.11.1.2	CANADA	63
5.11.2	EUROPE	63
5.11.3	ASIA PACIFIC	63
5.11.3.1	Japan	63
5.11.3.2	India	63
5.11.3.3	China	64
5.11.4	LATIN AMERICA	64
5.11.4.1	Brazil	64
5.11.4.2	Mexico	64
5.11.5	MIDDLE EAST	65
5.11.6	AFRICA	65
5.12	TECHNOLOGY ANALYSIS	65
5.13	CLINICAL TRIAL IMAGING: DISRUPTIVE TECHNOLOGIES	66
FIGURE 25 REVENUE SHIFT IN CLINICAL TRIAL IMAGING MARKET		
6	CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE	67
6.1	INTRODUCTION	68
TABLE 8 CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)		
6.2	SERVICES	68
TABLE 9 CLINICAL TRIAL IMAGING SERVICES MARKET, BY TYPE, 2021-2028 (USD MILLION)		
TABLE 10 CLINICAL TRIAL IMAGING SERVICES MARKET, BY REGION, 2021-2028 (USD MILLION)		
6.2.1	OPERATIONAL IMAGING SERVICES	69
6.2.1.1	Rising number of CROs to drive market	69
TABLE 11 OPERATIONAL IMAGING SERVICES MARKET, BY REGION, 2021-2028 (USD MILLION)		
6.2.2	READ ANALYSIS SERVICES	70
6.2.2.1	Growing clinical trial activity to support growth	70
TABLE 12 READ ANALYSIS SERVICES MARKET, BY REGION, 2021-2028 (USD MILLION)		
6.2.3	SYSTEM & TECHNICAL SUPPORT SERVICES	70
6.2.3.1	Need for continuous technical support to drive market	70
TABLE 13 SYSTEM & TECHNICAL SUPPORT SERVICES MARKET, BY REGION, 2021-2028 (USD MILLION)		
6.2.4	TRIAL DESIGN & CONSULTING SERVICES	71
6.2.4.1	Rising R&D spending and need for clinical trial support to boost outsourcing	71
TABLE 14 TRIAL DESIGN & CONSULTING SERVICES MARKET, BY REGION, 2021-2028 (USD MILLION)		
6.3	SOFTWARE	72
6.3.1	HIGH EFFICIENCY AND COST-SAVING BENEFITS OF SOFTWARE TO BOOST ADOPTION	72
TABLE 15 CLINICAL TRIAL IMAGING SOFTWARE MARKET, BY REGION, 2021-2028 (USD MILLION)		
7	CLINICAL TRIAL IMAGING MARKET, BY MODALITY	73
7.1	INTRODUCTION	74
TABLE 16 CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)		
7.2	CT	74

7.2.1	QUICK RESULTS AND LACK OF VISIBLE SIDE EFFECTS TO DRIVE ADOPTION	74
TABLE 17		
CLINICAL TRIAL IMAGING MARKET FOR CT, BY REGION, 2021-2028		
7.3	MRI	75
7.3.1	INCREASING ADOPTION OF MRI IN ONCOLOGICAL TRIALS AND STUDIES TO DRIVE MARKET	75
TABLE 18		
CLINICAL TRIAL IMAGING MARKET FOR MRI, BY REGION, 2021-2028 (USD MILLION)		
7.4	ULTRASOUND	76
7.4.1	HIGH SAFETY TO ENSURE CONTINUED DEMAND	76
TABLE 19		
CLINICAL TRIAL IMAGING MARKET FOR ULTRASOUND, BY REGION, 2021-2028 (USD MILLION)		
7.5	PET	77
7.5.1	ABILITY TO ASSESS PHARMACOKINETIC AND PHARMACODYNAMIC EVENTS TO BOOST ADOPTION	77
TABLE 20		
CLINICAL TRIAL IMAGING MARKET FOR PET, BY REGION, 2021-2028 (USD MILLION)		
7.6	X-RAY	78
7.6.1	WIDE USAGE IN BONE, CHEST, AND DENTAL IMAGING TO DRIVE MARKET	78
TABLE 21		
CLINICAL TRIAL IMAGING MARKET FOR X-RAY, BY REGION, 2021-2028 (USD MILLION)		
7.7	ECHOCARDIOGRAPHY	79
7.7.1	ADVANTAGES IN DEFINING AND QUALIFYING POPULATIONS TO BOOST USAGE	79
TABLE 22		
CLINICAL TRIAL IMAGING MARKET FOR ECHOCARDIOGRAPHY, BY REGION, 2021-2028 (USD MILLION)		
7.8	OTHER MODALITIES	80
TABLE 23		
CLINICAL TRIAL IMAGING MARKET FOR OTHER MODALITIES, BY REGION, 2021-2028 (USD MILLION)		
8		
CLINICAL TRIAL IMAGING MARKET, BY THERAPEUTIC AREA		
8.1	INTRODUCTION	82
TABLE 24		
CLINICAL TRIAL IMAGING MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)		
8.2	ONCOLOGY	82
8.2.1	INCREASING INCIDENCE OF CANCER TO DRIVE MARKET	82
TABLE 25		
CLINICAL TRIAL IMAGING MARKET FOR ONCOLOGY, BY REGION, 2021-2028 (USD MILLION)		
8.3	INFECTIOUS DISEASES	83
8.3.1	RISING DRUG DISCOVERY ACTIVITY TO BOOST DEMAND FOR IMAGING	83
TABLE 26		
CLINICAL TRIAL IMAGING MARKET FOR INFECTIOUS DISEASES, BY REGION, 2021-2028 (USD MILLION)		
8.4	NEUROLOGY	84
8.4.1	GROWING INVESTMENTS IN CNS DISORDER RESEARCH TO DRIVE MARKET	84
TABLE 27		
CLINICAL TRIAL IMAGING MARKET FOR NEUROLOGY, BY REGION, 2021-2028 (USD MILLION)		
8.5	CVS DISORDERS	85
8.5.1	HIGH MORTALITY RATE OF CVD TO INCREASE CLINICAL TRIAL ACTIVITY	85
TABLE 28		
CLINICAL TRIAL IMAGING MARKET FOR CVS DISORDERS, BY REGION, 2021-2028 (USD MILLION)		
8.6	ENDOCRINOLOGY	86
8.6.1	RISING INCIDENCE OF DIABETES TO DRIVE MARKET	86
TABLE 29		
CLINICAL TRIAL IMAGING MARKET FOR ENDOCRINOLOGY, BY REGION, 2021-2028 (USD MILLION)		
8.7	IMMUNOLOGICAL DISORDERS	87
8.7.1	WIDE PREVALENCE OF ALLERGIES, ASTHMA, AND AUTOIMMUNE DISEASES TO SUPPORT DEMAND FOR IMAGING IN TRIALS	87
TABLE 30		
CLINICAL TRIAL IMAGING MARKET FOR IMMUNOLOGICAL DISORDERS, BY REGION, 2021-2028 (USD MILLION)		
8.8	OTHER THERAPEUTIC AREAS	88
TABLE 31		
CLINICAL TRIAL IMAGING MARKET FOR OTHER THERAPEUTIC AREAS, BY REGION, 2021-2028 (USD MILLION)		
9		
CLINICAL TRIAL IMAGING MARKET, BY END USER		
9.1	INTRODUCTION	90
TABLE 32		
CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)		
9.2	PHARMACEUTICAL COMPANIES	90
9.2.1	PHARMA COMPANIES TO HOLD LARGEST SHARE OF END-USER MARKET	90

FIGURE 26	RISING R&D INVESTMENTS IN PHARMACEUTICAL INDUSTRY, 2012-2026 (USD BILLION)	91
TABLE 33	CLINICAL TRIAL IMAGING MARKET FOR PHARMACEUTICAL COMPANIES, BY REGION, 2021-2028 (USD MILLION)	91
9.3	BIOTECHNOLOGY COMPANIES	92
9.3.1	RISING R&D BUDGETS OF BIOTECH COMPANIES TO DRIVE MARKET	92
TABLE 34	TOP BIOTECHNOLOGY INVESTMENT DEALS, 2020	92
TABLE 35	CLINICAL TRIAL IMAGING MARKET FOR BIOTECHNOLOGY COMPANIES, BY REGION, 2021-2028 (USD MILLION)	93
9.4	MEDICAL DEVICE MANUFACTURERS	93
9.4.1	INCREASING R&D SPENDING BY MEDICAL DEVICES MANUFACTURERS TO SUPPORT GROWTH	93
TABLE 36	CLINICAL TRIAL IMAGING MARKET FOR MEDICAL DEVICE MANUFACTURERS, BY REGION, 2021-2028 (USD MILLION)	94
9.5	CROS	94
9.5.1	INCREASING TREND OF OUTSOURCING TO DRIVE MARKET	94
TABLE 37	CLINICAL TRIAL IMAGING MARKET FOR CROS, BY REGION, 2021-2028 (USD MILLION)	95
9.6	ACADEMIC & GOVERNMENT RESEARCH INSTITUTES	95
9.6.1	INCREASING RESEARCH ACTIVITY TO DRIVE MARKET	95
TABLE 38	CLINICAL TRIAL IMAGING MARKET FOR ACADEMIC & GOVERNMENT RESEARCH INSTITUTES, BY REGION, 2021-2028 (USD MILLION)	96
9.7	OTHER END USERS	96
TABLE 39	CLINICAL TRIAL IMAGING MARKET FOR OTHER END USERS, BY REGION, 2021-2028 (USD MILLION)	96
10	CLINICAL TRIAL IMAGING MARKET, BY REGION	97
10.1	INTRODUCTION	98
TABLE 40	CLINICAL TRIAL IMAGING MARKET, BY REGION, 2021-2028 (USD MILLION)	98
10.2	NORTH AMERICA	98
FIGURE 27	NORTH AMERICA: CLINICAL TRIAL IMAGING MARKET SNAPSHOT	99
10.2.1	NORTH AMERICA: RECESSION IMPACT	99
TABLE 41	NORTH AMERICA: CLINICAL TRIAL IMAGING MARKET, BY COUNTRY, 2021-2028 (USD MILLION)	100
TABLE 42	NORTH AMERICA: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)	100
TABLE 43	NORTH AMERICA: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)	100
TABLE 44	NORTH AMERICA: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)	101
10.2.2	US	101
10.2.2.1	Rising biopharma investment to favor market growth	101
TABLE 45	US: PRODUCT APPROVALS IN CLINICAL TRIAL IMAGING	101
TABLE 46	US: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)	102
TABLE 47	US: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)	102
TABLE 48	US: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)	103
10.2.3	CANADA	103
10.2.3.1	Rising per capita healthcare spending to drive market	103
TABLE 49	CANADA: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)	103
TABLE 50	CANADA: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)	104
TABLE 51	CANADA: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)	104
10.3	EUROPE	105
10.3.1	EUROPE: RECESSION IMPACT	105
TABLE 52	EUROPE: CLINICAL TRIAL IMAGING MARKET, BY COUNTRY, 2021-2028 (USD MILLION)	106
TABLE 53	EUROPE: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)	106
TABLE 54	EUROPE: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)	107
TABLE 55	EUROPE: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)	107
10.3.2	GERMANY	108
10.3.2.1	Germany to dominate clinical trial imaging market in Europe	108

TABLE 56□GERMANY: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)□108

TABLE 57□GERMANY: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)□108

TABLE 58□GERMANY: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)□109

10.3.3□UK□109

10.3.3.1□Favorable government initiatives and growing R&D spending to drive market□109

TABLE 59□UK: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)□109

TABLE 60□UK: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)□110

TABLE 61□UK: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)□110

10.3.4□FRANCE□111

10.3.4.1□Presence of leading pharmaceutical companies to support growth□111

TABLE 62□FRANCE: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)□111

TABLE 63□FRANCE: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)□111

TABLE 64□FRANCE: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)□112

10.3.5□ITALY□112

10.3.5.1□Increasing drug approvals to ensure sustained demand for clinical trial imaging□112

TABLE 65□ITALY: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)□112

TABLE 66□ITALY: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)□113

TABLE 67□ITALY: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)□113

10.3.6□SPAIN□113

10.3.6.1□Increasing biologics production to support market growth□113

TABLE 68□SPAIN: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)□114

TABLE 69□SPAIN: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)□114

TABLE 70□SPAIN: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)□115

10.3.7□REST OF EUROPE□115

TABLE 71□REST OF EUROPE: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)□115

TABLE 72□REST OF EUROPE: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)□116

TABLE 73□REST OF EUROPE: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)□116

10.4□ASIA PACIFIC□117

FIGURE 28□ASIA PACIFIC: CLINICAL TRIAL IMAGING MARKET SNAPSHOT□117

10.4.1□ASIA PACIFIC: RECESSION IMPACT□118

TABLE 74□ASIA PACIFIC: CLINICAL TRIAL IMAGING MARKET, BY COUNTRY, 2021-2028 (USD MILLION)□118

TABLE 75□ASIA PACIFIC: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)□118

TABLE 76□ASIA PACIFIC: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)□119

TABLE 77□ASIA PACIFIC: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)□119

10.4.2□CHINA□120

10.4.2.1□China to dominate APAC market throughout forecast period□120

TABLE 78□CHINA: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)□120

TABLE 79□CHINA: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)□120

TABLE 80□CHINA: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)□121

10.4.3□JAPAN□121

10.4.3.1□Rising population and healthcare expenditure to favor market growth□121

TABLE 81□JAPAN: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)□121

TABLE 82□JAPAN: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)□122

TABLE 83□JAPAN: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)□122

10.4.4□INDIA□123

10.4.4.1□Rising R&D investment to boost adoption of clinical trial imaging□123

TABLE 84□INDIA: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)□123

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



TABLE 85	INDIA: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)	124
TABLE 86	INDIA: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)	124
10.4.5	REST OF ASIA PACIFIC	125
TABLE 87	REST OF ASIA PACIFIC: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)	125
TABLE 88	REST OF ASIA PACIFIC: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)	125
TABLE 89	REST OF ASIA PACIFIC: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)	126
10.5	LATIN AMERICA	126
10.5.1	LOW COST OF RESOURCES, TAX ADVANTAGES TO ATTRACT PLAYER INTEREST	126
10.5.2	LATIN AMERICA: RECESSION IMPACT	127
TABLE 90	LATIN AMERICA: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)	127
TABLE 91	LATIN AMERICA: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)	127
TABLE 92	LATIN AMERICA: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)	128
10.6	MIDDLE EAST & AFRICA	128
10.6.1	RIISING RESEARCH FUNDING AND PARTNERSHIPS TO DRIVE MARKET	128
10.6.2	MIDDLE EAST & AFRICA: RECESSION IMPACT	129
TABLE 93	MIDDLE EAST & AFRICA: CLINICAL TRIAL IMAGING MARKET, BY SERVICE & SOFTWARE, 2021-2028 (USD MILLION)	129
TABLE 94	MIDDLE EAST & AFRICA: CLINICAL TRIAL IMAGING MARKET, BY MODALITY, 2021-2028 (USD MILLION)	129
TABLE 95	MIDDLE EAST & AFRICA: CLINICAL TRIAL IMAGING MARKET, BY END USER, 2021-2028 (USD MILLION)	130
11	COMPETITIVE LANDSCAPE	131
11.1	OVERVIEW	131
11.2	KEY PLAYER STRATEGIES/RIGHT TO WIN	131
11.2.1	RIGHT-TO-WIN APPROACHES ADOPTED BY PLAYERS	131
TABLE 96	CLINICAL TRIAL IMAGING MARKET: STRATEGIES ADOPTED BY KEY PLAYERS	131
11.3	REVENUE SHARE ANALYSIS OF TOP MARKET PLAYERS	133
FIGURE 29	REVENUE SHARE ANALYSIS OF KEY PLAYERS (2022)	133
11.4	MARKET SHARE ANALYSIS	133
FIGURE 30	MARKET SHARE ANALYSIS OF KEY PLAYERS (2022)	133
TABLE 97	CLINICAL TRIAL IMAGING MARKET: DEGREE OF COMPETITION	134
11.5	COMPANY EVALUATION MATRIX (2022)	135
11.5.1	STARS	135
11.5.2	EMERGING LEADERS	135
11.5.3	PERVASIVE PLAYERS	135
11.5.4	PARTICIPANTS	135
FIGURE 31	CLINICAL TRIAL IMAGING MARKET: COMPANY EVALUATION MATRIX, 2022	136
11.6	COMPANY EVALUATION MATRIX FOR STARTUPS/SMES (2022)	137
11.6.1	PROGRESSIVE COMPANIES	137
11.6.2	STARTING BLOCKS	137
11.6.3	RESPONSIVE COMPANIES	137
11.6.4	DYNAMIC COMPANIES	137
FIGURE 32	CLINICAL TRIAL IMAGING MARKET: COMPANY EVALUATION MATIRX FOR STARTUPS/SMES, 2022	138
11.7	COMPETITIVE BENCHMARKING	138
FIGURE 33	PRODUCT AND GEOGRAPHIC FOOTPRINT ANALYSIS OF KEY PLAYERS	138
TABLE 98	COMPANY PRODUCT FOOTPRINT	139
TABLE 99	COMPANY GEOGRAPHICAL FOOTPRINT	139
11.8	COMPETITIVE SCENARIO	139
11.8.1	PRODUCT LAUNCHES & APPROVALS	139
TABLE 100	KEY PRODUCT LAUNCHES & APPROVALS (2020-2023)	139

## 11.8.2 DEALS 140

TABLE 101 KEY DEALS (2020-2023) 140

## 12 COMPANY PROFILES 141

(Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats)\*

### 12.1 KEY PLAYERS 141

#### 12.1.1 ICON PLC. 141

TABLE 102 ICON PLC.: BUSINESS OVERVIEW 141

FIGURE 34 ICON PLC.: COMPANY SNAPSHOT (2022) 142

#### 12.1.2 BIOTELEMETRY (PHILIPS) 144

TABLE 103 BIOTELEMETRY: BUSINESS OVERVIEW 144

FIGURE 35 PHILIPS GROUP: COMPANY SNAPSHOT (2022) 145

#### 12.1.3 MEDPACE HOLDINGS INC. 147

TABLE 104 MEDPACE HOLDINGS INC.: BUSINESS OVERVIEW 147

FIGURE 36 MEDPACE HOLDINGS INC.: COMPANY SNAPSHOT (2022) 147

#### 12.1.4 BIOMEDICAL SYSTEMS CORPORATION (ERT CLINICAL) 149

TABLE 105 BIOMEDICAL SYSTEMS CORPORATION: BUSINESS OVERVIEW 149

#### 12.1.5 BIOCLINICA INC. (CLARIO) 150

TABLE 106 BIOCLINICA INC.: BUSINESS OVERVIEW 150

#### 12.1.6 IXICO PLC. 154

TABLE 107 IXICO PLC.: BUSINESS OVERVIEW 154

FIGURE 37 IXICO PLC.: COMPANY SNAPSHOT (2022) 154

#### 12.1.7 RESONANCE HEALTH ANALYSIS SERVICES (RESONANCE HEALTH) 157

TABLE 108 RESONANCE HEALTH LTD.: BUSINESS OVERVIEW 157

FIGURE 38 RESONANCE HEALTH LTD.: COMPANY SNAPSHOT (2022) 157

#### 12.1.8 RADIANT SAGE LLC 159

TABLE 109 RADIANT SAGE LLC: BUSINESS OVERVIEW 159

#### 12.1.9 INTRINSIC IMAGING (WCG CLINICAL) 160

TABLE 110 WCG CLINICAL: BUSINESS OVERVIEW 160

#### 12.1.10 CARDIOVASCULAR IMAGING TECHNOLOGIES 161

TABLE 111 CARDIOVASCULAR IMAGING TECHNOLOGIES: BUSINESS OVERVIEW 161

### 12.2 OTHER PLAYERS 162

#### 12.2.1 MEDICAL METRICS 162

#### 12.2.2 PRISM CLINICAL IMAGING 163

#### 12.2.3 BOSTON IMAGING CORE LAB 164

#### 12.2.4 ANAGRAM 4 CLINICAL TRIALS 164

#### 12.2.5 LYSCAUT MEDICAL IMAGING COMPANY 165

#### 12.2.6 CALYX GROUP 165

#### 12.2.7 BIOSPECTIVE 166

#### 12.2.8 PROSCAN IMAGING 167

#### 12.2.9 MICRON, INC. 167

#### 12.2.10 IMAGING ENDPOINTS LI LLC. 168

#### 12.2.11 PERSPECTUM 169

#### 12.2.12 PHARMTRACE KLINISCHE ENTWICKLUNG GMBH 169

#### 12.2.13 WORLD CARE CLINICAL 170

#### 12.2.14 MEDIAN TECHNOLOGIES 170

#### 12.2.15 INVICRO. LLC. 171

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

\*Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats)\* might not be captured in case of unlisted companies.

13 APPENDIX 172

13.1 DISCUSSION GUIDE 172

13.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL 176

13.3 CUSTOMIZATION OPTIONS 178

13.4 RELATED REPORTS 178

13.5 AUTHOR DETAILS 179

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Clinical Trial Imaging Market by Software & Service (Operational Imaging, Trial Design), Modality (CT, MRI, X-Ray, PET, Ultrasound, ECHO), Therapeutic Area (Infectious, Oncology, CNS, CVD), End User (Pharma, Biotech, CROs) & Region - Global Forecast to 2028**

Market Report | 2023-08-18 | 175 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code\*

Country\*

Date

Signature