

Clinical Trial Imaging Market Report and Forecast 2025-2034

Market Report | 2025-06-20 | 400 pages | EMR Inc.

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Report description:

The global clinical trial imaging market was valued at USD 1.42 Billion in 2024, driven by the increasing prevalence of cancer and cardiovascular diseases and growing importance of precision imaging across the globe. The market is anticipated to grow at a CAGR of 7.80% during the forecast period of 2025-2034 to achieve a value of USD 3.01 Billion by 2034.

Clinical Trial Imaging Market Overview

Clinical trial imaging refers to the use of medical imaging technologies such as MRI, CT scans, PET scans, and ultrasound to gather crucial data during clinical research. These imaging techniques help evaluate the safety, efficacy, and biological effects of new drugs, therapies, or medical devices. By offering non-invasive visual insights into anatomical and functional changes, clinical trial imaging supports accurate diagnosis, monitoring, and endpoint assessment. It plays a vital role in areas like oncology, neurology, and cardiology, where precise visual evidence is key to regulatory approval and improved patient outcomes.

Clinical Trial Imaging Market Growth Drivers

Digital Advancements to Drive Market Growth

The growing need for high-resolution imaging, automation of radiology workflows, and integration of AI in image interpretation are significant drivers in the market. For instance, in December 2024, Konica Minolta Healthcare Americas, Inc. unveiled several new digital radiography (DR) solutions at RSNA 2024, including Bone Suppression Imaging (BSI) for chest X-rays. Recently FDA-cleared, BSI enhances lung visibility by suppressing rib and clavicle structures. The new AeroDR PDR flat panel detector also targets budget-conscious facilities seeking modernisation. These innovations are expected to boost clinical trial imaging by improving diagnostic precision, streamlining workflows, and expanding access to advanced imaging tools in diverse healthcare settings.

Rising Technological Innovations to Boost Clinical Trial Imaging Market Value

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With increasing emphasis on real-time imaging and seamless data integration in clinical trials, innovative imaging platforms and robust PACS systems are gaining traction. For instance, in February 2024, aycan supported Enspectra Health's clinical trial by preparing DICOM data from the FDA-cleared VIOTM System, a breakthrough tool for visualising skin cellular structures in real-time. Aycan's PACS, viewers, and expert services ensured clinical trial readiness. This development highlights the expanding role of imaging technology providers in trial data management. Such innovations are poised to accelerate trial timelines, improve imaging precision, and bolster market demand for sophisticated imaging infrastructure in dermatological and related research areas.

Clinical Trial Imaging Market Trends

The market is witnessing several trends and developments to improve the current scenario. Some of the notable trends are as follows:

Strategic Collaborations Enhancing Market Development

The growing demand for data accuracy and standardisation in clinical trials is encouraging alliances between tech providers and CROs. For instance, in January 2025, Yunu, a leading imaging workflow and data solutions provider, partnered with WCG, a clinical trial services giant, to streamline imaging services. With Yunu already managing over 5,000 active protocols and contributing imaging endpoint data to more than 25% of NCI-designated cancer centres, this partnership is poised to enhance trial accuracy and transparency. Such strategic collaborations are expected to elevate the quality of imaging trials, creating a more robust ecosystem for drug development in the forecast period.

Rising Integration of Advanced Technologies Accelerating Clinical Trial Imaging Market Growth

Rising demand for precision diagnostics and cardiovascular monitoring is fuelling innovation in imaging modalities used in clinical trials. For instance, in May 2024, GE HealthCare and Medis Medical Imaging collaborated to advance Medis QFR, a non-invasive imaging tool for coronary artery disease, within GE's Allia Platform. This partnership will improve workflow efficiency, reduce complexity, and support precision diagnostics. As cardiovascular diseases remain a key therapeutic area, the integration of advanced imaging software into clinical workflows is expected to drive market growth, improve trial outcomes, and enable faster approvals for cardiovascular therapies in the coming years.

Adoption of Artificial Intelligence to Influence Clinical Trial Imaging Market Size Positively

As trials grow in complexity, artificial intelligence is becoming essential for improving operational efficiency and image interpretation. For instance, in November 2022, VIDA Diagnostics launched its updated AI-driven Intelligence Portal 2.0 to streamline clinical trial imaging processes. The platform aims to accelerate trial site onboarding while ensuring consistent imaging quality. This innovation addresses the industry's pressing need to reduce trial delays and operational costs, especially in respiratory trials. The adoption of AI-enabled platforms like VIDA's not only improves imaging analysis but also supports faster, more efficient clinical trial execution, ultimately boosting the overall value and competitiveness of the global imaging market.

Emphasis on Workflow Optimization to Augment Clinical Trial Imaging Market Demand

The increasing emphasis on rapid trial execution and regulatory compliance is pushing sponsors and CROs to invest in advanced imaging management solutions. Companies are now integrating workflow automation tools that ensure consistency and reduce manual errors. Enhanced platforms support better image acquisition, storage, and endpoint review processes. These improvements are essential for trial scalability and speed, particularly in multi-centre studies. As clinical trials expand globally and become more complex, imaging workflow optimisation stands as a key trend that will continue to drive the expansion of the

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market during the forecast period.

Clinical Trial Imaging Market Segmentation

Global Clinical Trial Imaging Market Report and Forecast 2025-2034 offers a detailed analysis of the market based on the following segments:

Market Breakup by Offerings

- Software
- Services

??- Read Analysis Services

??- System and Technical Support Services

??- Trial Design and Consulting Services

??- Operational Imaging Services

Market Breakup by Modality

- Computed Tomography Scan
- Magnetic Resonance Imaging
- X-Ray
- Ultrasound
- Optical Coherence Tomography (OCT)
- Others

Market Breakup by Therapeutic Areas

- Neurovascular Diseases
- Cardiovascular Diseases
- Orthopedics and MSK Disorders
- Oncology
- Ophthalmology
- Nephrology
- Others

Market Breakup by End User

- Biotechnology and Pharmaceutical Companies
- Medical Devices Manufacturers
- Academic and Government Research Institutes
- Contract Research Organization (CROs)
- Others

Market Breakup by Region

- North America

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- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

Clinical Trial Imaging Market Share

Services Segment to Lead the Share by Offerings

The services segment is poised to lead the market owing to rising demand for expert image interpretation, trial design consultation, and end-to-end operational imaging services. These offerings reduce complexity and ensure regulatory compliance, especially in multicentre studies. Increased outsourcing of imaging operations by pharmaceutical and biotechnology companies has further accelerated demand. With growing reliance on precision medicine and complex trial protocols, trial-specific imaging support services are becoming indispensable. This segment's adaptability to diverse imaging needs and technological integration is expected to significantly propel the market share during the forecast period.

Magnetic Resonance Imaging to Hold a Substantial Share by Modality

Magnetic resonance imaging (MRI) is expected to hold the largest share in the market due to its superior contrast resolution and detailed soft tissue imaging. MRI is vital in neurology, oncology, and musculoskeletal trials, offering accurate and non-invasive assessment without ionising radiation. Increasing neurological and cancer research is fuelling its adoption. As per the analysis by Expert Market Research, the market is expected to grow at a CAGR of 6.20% during the forecast period of 2025-2034. The modality also supports functional imaging, aiding in the development of innovative therapies. Technological advancements in MRI sequences and the integration of AI for image analysis further strengthen its relevance, ensuring its dominance in clinical trials over the coming years.

Oncology to Lead the Segmentation by Therapeutic Areas

Oncology is anticipated to dominate the therapeutic areas segment due to the global surge in cancer clinical trials and rising investments in novel cancer therapies. Imaging is critical for tumor detection, progression monitoring, and treatment response evaluation. Modalities like CT, MRI, and PET scans are integral to oncology trials, enhancing precision and aiding in robust endpoint assessments. As per the analysis by Expert Market Research, the global computed tomography market is likely to grow at a rate of 6.00% during the forecast period of 2025-2034. As personalized cancer treatments expand, imaging-guided approaches become indispensable for accurate patient stratification and efficacy validation. This ongoing emphasis on cancer drug development will continue driving the demand for imaging services and technologies in oncology-related clinical trials.

Biotechnology and Pharmaceutical Companies to Hold a Significant Share by End User

Biotechnology and pharmaceutical companies are projected to hold the largest market share by end user, as they remain the primary sponsors of clinical trials globally. With increasing pressure to reduce time-to-market and meet stringent regulatory requirements, these companies increasingly rely on advanced imaging to validate therapeutic efficacy and safety. Imaging plays a crucial role in supporting clinical endpoints and biomarker evaluation. Moreover, the shift toward personalised medicine and biologics is pushing for more imaging-centric trial designs. Their substantial investment capacity and strategic focus on innovation ensure continued dominance of this end-user segment in the forecast period.

Clinical Trial Imaging Market Analysis by Region

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North America is poised to lead the market due to its high concentration of pharmaceutical giants, early adoption of advanced imaging technologies, and a robust clinical research infrastructure. The region also benefits from strong regulatory support and extensive funding for R&D initiatives, which fosters innovation in imaging solutions for drug development. Additionally, the rising demand for decentralised clinical trials and AI-powered imaging analytics enhances North America's leadership position. Europe follows with its established CRO network and focuses on oncology trials. Asia-Pacific is rapidly emerging, driven by expanding clinical research in China and India, while Latin America and the Middle East and Africa are witnessing moderate growth due to increasing clinical trial participation and improving healthcare infrastructure.

Leading Players in the Clinical Trial Imaging Market

The key features of the market report comprise patent analysis, funding and investment analysis, and strategic initiatives by the leading players. The major companies in the market are as follows:

Navitas Life Sciences

Headquartered in Princeton, New Jersey, Navitas Life Sciences was established in 1984. The company offers end-to-end clinical research services, including imaging, across various therapeutic areas. Navitas delivers operational imaging solutions, AI-powered data analytics, and regulatory expertise to accelerate drug development timelines. It caters to both large pharmaceutical firms and emerging biotechs by integrating clinical trial imaging into broader data-driven strategies. Its global infrastructure and deep therapeutic knowledge ensure effective management of complex imaging trials, helping clients maintain compliance, improve accuracy, and enhance overall clinical trial outcomes.

BioTelemetry

Founded in 1994 and headquartered in Malvern, Pennsylvania, BioTelemetry, a part of Philips, specialises in remote patient monitoring and diagnostic services, including clinical trial imaging solutions. The company offers mobile cardiac telemetry and holter monitoring systems, which are vital for cardiovascular imaging trials. BioTelemetry supports clinical studies through real-time imaging data collection, precise image interpretation, and streamlined data transmission, ensuring faster insights and regulatory compliance. Its robust digital platforms and scalable technology infrastructure make it a preferred partner in cardiovascular and chronic disease-focused clinical research globally.

ICON PLC

Established in 1990 and headquartered in Dublin, Ireland, ICON PLC is a leading global CRO offering full-spectrum clinical development services, including advanced imaging solutions. ICON provides operational imaging services, read analysis, trial design consulting, and technical support across multiple therapeutic areas. Its imaging expertise supports oncology, neurology, and rare disease trials through AI-integrated platforms, centralised image review, and real-time data analytics. With a strong global footprint and a client-focused approach, ICON enables pharmaceutical and biotechnology firms to optimise imaging protocols, enhance trial accuracy, and expedite regulatory submissions.

IXICO PLC

Founded in 2004 and based in London, United Kingdom, IXICO PLC is a neuroimaging specialist serving the clinical trial market. The company provides advanced imaging services and AI-driven analytics specifically for neurological conditions such as Alzheimer's, Parkinson's, and Huntington's disease. IXICO offers solutions including read analysis, central image management, and biomarker quantification using MRI, PET, and other imaging modalities. Its expertise in neurodegenerative disorders and precision imaging supports early diagnosis and disease monitoring. IXICO's contributions are vital in improving the accuracy, speed, and

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outcome predictability of neurological clinical trials worldwide.

Other key players in the market include ProScan Imaging, Radiant Sage LLC, Cardiovascular Imaging Technologies, Biomedical Systems Corp, Clario, and WCG Clinical.

Key Questions Answered in the Clinical Trial Imaging Market

- What was the global clinical trial imaging market value in 2024?
- What is the global clinical trial imaging market forecast outlook for 2025-2034?
- What is market segmentation based on offerings?
- What is market segmentation based on modality?
- What is market segmentation based on therapeutic areas?
- What is market segmentation based on end user?
- What are the major factors aiding the global clinical trial imaging market demand?
- How has the market performed so far, and how is it anticipated to perform in the coming years?
- What are the market's major drivers, opportunities, and restraints?
- What are the major global clinical trial imaging market trends?
- Which offerings will lead the market segment?
- Which modality will lead the market segment?
- Which therapeutic areas will lead the market segment?
- Which end user will lead the market segment?
- Who are the key players involved in the global clinical trial imaging market?
- What is the patent landscape of the market?
- What are the current unmet needs and challenges in the market?
- How are partnerships, collaborations, mergers, and acquisitions among the key market players shaping the market dynamics?

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- 17.4.3 Demographic Reach and Achievements
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- 18 Global Clinical Trial Imaging Market - Distribution Model (Additional Insight)
- 18.1 Overview

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18.2 Potential Distributors

18.3 Key Parameters for Distribution Partner Assessment

19 Key Opinion Leaders (KOL) Insights (Additional Insight)

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