
Description: Small animal imaging is increasingly being implemented in the research studies from the late stage studies to the clinical phases. Imaging plays a significant role in the assessment of specific drug candidate or treatment regime, in phenotyping and understanding the pathophysiology of various diseases. Technologies used for in vivo small animal imaging allow longitudinal evaluation of disease as well as of drug therapy within the same animal, thus increasing efficacy and decreasing animal numbers used in research studies.

The overall small animal imaging (in vivo) market is valued at $790 million in 2012, and is estimated to grow at an annual growth rate of 14.5% over the next five years. The growing market shows preference towards new technologies such as hybrid systems – PET + SPECT + CT, SPECT + MRI and PET + MRI for the range of advantages offered by them over traditional standalone techniques. The global small animal imaging (in vivo) market has witnessed challenging and dynamic market conditions in terms of government funding/grants and technological advancements in the last five years. Small animal imaging (in vivo) industry has witnessed numerous technological advancements over the last two decades and it is expected to continue with the same trend in future to solve the present challenges and meet the demanding needs of the market.

The market growth is driven by factors such as increasing number of pharma companies and research institutions, rising application of functional imaging, growing adoption rate for small animal imaging and technological advancements. However, high device cost and technological limitations are the factors hindering the market growth. Sustainability of players in highly competitive environment, industry consolidation and availability of radiopharmaceuticals are the major challenges, while unique combinations in MRI high resolution and sensitivity of imaging devices with usage in multiple applications and emerging markets are the factors that seem to be favorable opportunities to the market.

In 2012, North America accounted for the biggest market share with about 38.2% share of the global small animal imaging (in vivo) systems and reagents market, followed by Europe. Though the Asian and Latin American countries signify to be the fastest growing markets due to growing number of research institutions and CRO’s, increasing government support for research and rising industry-academia partnerships for small animal research. The negative factors such as high competition in mature countries, economic slowdown and pricing pressures and will oblige the companies to focus on the Asian market.

Small animal imaging market seems to be highly competitive, as each player is focusing to gain a large market share. Rapid industry consolidation is a burning issue which is affecting the small market players and also forcing the major players to alter their marketing strategies.

This report includes company profiles of major players such as Bruker Corporation (U.S.), Siemens AG (Germany), Life Technologies Corporation (U.S.), FUJIFILM Holdings Corporation (Japan), Miltenyi Biotec GmbH (Germany), PerkinElmer, Inc. (U.S.), Bioscan, Inc. (U.S.), Mediso Medical Imaging Systems (Hungary), Gamma Medica (U.S.), Aspect Imaging (Israel), Targeson, Inc. (U.S.) and Scanco Medical (Switzerland).

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