

## **Clinical Trials Outsourcing Market - Global Outlook & Forecast 2022-2027**

Market Report | 2022-08-10 | 317 pages | Arizton Advisory & Intelligence

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### **Report description:**

The clinical trials outsourcing market is expected to grow at a CAGR of 6.71% during 2022-2027.

The pharma & biotech companies hire other companies to conduct the clinical trials, as the companies do not have the expertise, time, or infrastructure to carry out the clinical trials. Outsourcing clinical trials delivers advantages such as cost efficiency, minimum timeline, and best result delivery. Most clinical trials are outsourced to contract research organizations and third-party vendors.

Clinical trial outsourcing delivers significant advantages in terms of cost. Clinical drug development trials are vital, requiring higher expenditure and high-class infrastructure and expertise. Due to the complexity of clinical trial processes, sponsors constantly face pressure from regulatory agencies, insurers, and the medical community to reduce costs by increasing the size of development projects, their pipelines' pipeline quality and safety of their products, and their compliance with regulatory requirements.

Most Biopharmaceutical companies spend their higher expenditure on research & development activities and clinical trials. In the end, lower chances of success rate impact the company's growth largely; therefore, outsourcing easily reduces this complexity. Remote trials can reduce around 25% to 30% trials cost due to the services associated with patient travel and the number of staff required for monitoring on the site.

### **Impact of Covid-19 Pandemic**

The Covid-19 pandemic gave an absolute massive shift and forced the clinical trial industries to look for outsourcing. Clinical trial complexity is a significant factor that drives clinical trial outsourcing. Robust pipelines and stringent regulations in clinical trials operate the clinical development services.

### **Virtual Clinical Trials: The Rising Market**

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Virtual clinical trials are a rapidly increasing trend in biopharma industries. It is one of the new clinical trial models, a highly underutilized method for conducting clinical trials and clinical research. Virtual clinical trials are cost-effective, time-saving, and easier for participants. Virtual collaboration strategies in clinical trials, using clinical trials software allows businesses to work rapidly and more efficiently, eliminates the need for document sharing to additional office locations, and reduces the burden.

#### KEY INDUSTRY INSIGHTS

- Downscaling the companies, managing the cost of the research, and reducing the expenditure has led to raised clinical trial outsourcing by the biopharmaceutical industry. The three significant factors, globalization, digitalization, and personalized medicines, highly impacted the clinical trials industries. These three major factors have positively influenced the clinical trial outsourcing market growth in recent years.
- Across the world, the rising patient population is one of the major problems for developed countries as their healthcare expenditure is increasing, so there is a demand for advanced treatments which provide value-based solutions to the patients. Biopharmaceutical companies constantly look for new drugs and derived clinical trial activities. Pharma Research and development outsourcing activities are significant in the industry, giving high potential for this market and related activities and triggering the demand for clinical trials outsourcing.
- AI in clinical trials is a revolutionizing technology primarily adopted among large CROs. In recent years AI application was rapidly explored during the COVID-19 pandemic period accelerating the clinical trials for a faster cure for the pandemic.
- The Indian biotech industry alone accounts for 2,700 start-ups, and the estimated number will increase to 10,000 by 2024. Globally, more than 2,093,000 pharma start-ups are running in the market; this rise in smaller companies will demand outsourcing clinical trials.
- Synthetic Data Improving Clinical Development minimizes or replaces the control arm of the clinical trial. It reduces the demand for patient recruitment, saves time and money, and eliminates the ethical issues regarding the placebo.

Usually, the pharma companies do not have access to real-world data. They majorly limit themselves within the clinical trials that they have conducted. This synthetic data, which is from real-world data, will help the companies to understand the real world and help them to find better solutions. Currently, there is an increase in single-arm clinical trials for rare diseases and oncology therapeutic areas. This has made it easy for people to work when comparing treatments. The entry of synthetic and external control arms has changed rapidly and growing significantly by enabling improved access to data, including statistical tool kits from various clinical research fields.

#### Segmentation by Application

- Cancer
- CVDs
- Infectious Diseases
- Infectious Diseases
- Musculoskeletal Diseases
- Nervous System Disorders
- Other Diseases

#### Segmentation by Clinical Trial Phase

- Phase I
- Phase II
- Phase III
- Phase IV

#### Segmentation by End-Users

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- Small & Mid-Size Companies
- Large Size Companies

## CLINICAL TRIALS OUTSOURCING MARKET TRENDS

-□Implementing artificial intelligence (AI) in clinical trials is a revolutionizing technology, primarily adopted among large CROs. In recent years AI application was rapidly explored during the COVID-19 pandemic period accelerating the clinical trials for a faster cure for the pandemic. AI (Artificial Intelligence) helps make every clinical trial stage more efficient with design and patient recruitment and retention, followed by clinical trials outsourcing services by contract research organizations. It also allowed the companies to manage the extensive data without any errors and make decisions accordingly.

-□Pharmaceutical and biotech companies are relying on research and development activities to develop new drugs. Rising expenditure on clinical research and development will deliver high market growth opportunities.

-□An excellent opportunity for outsourcing clinical trials lies in rare diseases due to the limited patient population and rising prevalence of rare diseases globally. For outsourcing leaders, patient recruitment and retention are easy with the rising prevalence of rare diseases in low-middle companies. These CROs have an excellent partnership with government bodies and large healthcare providers to recruit patients. Most outsourcing companies are based in low-middle-income countries.

-□The increasing demand for large molecules and personalized medicines such as cell and gene therapies have also helped drive the CRO outsourcing market consistently.

-□An increasing number of small biopharma companies is one of the best clinical trial outsourcing market opportunities. The small and medium-sized biopharma companies account for a higher number of clinical research. Due to lower capital availability, lack of infrastructure, and expertise, small biopharma companies look towards outsourcing clinical trials.

## INSIGHTS BY GEOGRAPHY

North America is the leading region in clinical trial outsourcing. But in recent years, clinical trial outsourcing shifting towards the emerging market. Emerging markets such as low-middle-income countries are the best geography for this market due to the high patient population and unaffordable pricing of new treatments or existing treatments in the LMICs.

On the other side, some emerging markets, such as BRICS (Brazil, Russia, India, China, and South Africa), have a better opportunity for clinical trials outsourcing market. These emerging geographies have a high potential for outsourcing trials. High patient pool demography is one of the strong reasons for outsourcing in those countries.

### Segmentation by Geography

- APAC
  - o□China
  - o□Japan
  - o□South Korea
  - o□Australia
  - o□India
- North America
  - o□US
  - o□Canada
- Europe
  - o□Germany
  - o□UK
  - o□France
  - o□Spain

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- Latin America
  - o□ Brazil
  - o□ Mexico
- Middle East & Africa
  - o□ Saudi Arabia
  - o□ UAE

Key Vendors:

- Charles River Laboratories
- IQVIA
- ICON plc
- Labcorp Drug Development
- Syneos Health
- Thermo Fischer Scientific
- Wuxi AppTec
- Paraxel

Other Prominent Vendors

- Advanced Clinical
- Bioanalytix
- Curia Global
- CMED
- Cromos Pharma
- Criterium
- KCR SA.
- Medpace
- Medelis
- Oct Group
- Protrials Research
- Prometrika
- Quality Data Services
- QPS
- Sofpromed
- Veristat
- Worldwide Clinical Trials

KEY QUESTIONS ANSWERED

1. □ WHAT IS THE EXPECTED GROWTH OF THE CLINICAL TRIALS OUTSOURCING MARKET IN THE GLOBAL MARKET?
2. □ WHO ARE THE MAJOR PLAYERS IN THE CLINICAL TRIALS OUTSOURCING MARKET?
3. □ WHAT IS THE GROWTH RATE OF THE CLINICAL TRIALS OUTSOURCING MARKET?
4. □ HOW DOES COVID-19 IMPACT THE MARKET GROWTH OF CLINICAL TRIALS OUTSOURCING MARKET SHARE?
5. □ WHAT ARE THE FACTORS DRIVING THE CLINICAL TRIALS OUTSOURCING MARKET GROWTH?

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