

**Clinical Trial Supplies Market by Services (Manufacturing, Packaging, Logistics), Phases, Type (Small Molecules, Biologics), Therapeutic Areas (Oncology, CVD, Infectious, Immunology), End User (Pharma, Biotech, CROs), & Region - Global Forecast to 2028**

Market Report | 2023-10-09 | 328 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 supplies market size is projected to reach USD 6.3 billion by 2028 from USD 3.9 billion in 2023, at a CAGR of 9.9% during the forecast period. Factors such as Increasing number of clinical trials, Growing product pipeline, and Increasing decentralization of clinical trials are likely to have positive impact on the market growth.

"The logistics and distribution segment held the dominant share in the clinical trial supplies market"

Based on services, the global clinical trial supplies market is segmented into pathogen component, adjuvant emulsions, particulate adjuvants, saponin-based adjuvants and other adjuvants. The adjuvant emulsions segment held a dominant share in the market in 2022. Extensive use of adjuvant emulsions in COVID-19 & other infectious diseases and the rising prevalence of contagious diseases are likely to have positive impact on the growth of the market.

"Phase II segment accounted for the largest share of the phase segment in 2022."

Based on phase, the clinical trial supplies market is segmented into phase I, phase II, phase III, phase IV, BA/BE studies. In 2022, the phase II segment accounted for the largest share of the clinical trial supplies market. The segment held the dominant share in the market owing to various factors such as increasing the number of registration in clinical trials and the rising R&D investment by pharmaceutical and biotechnologies company for new cancer drug development.

"Asia Pacific region is likely to grow at a faster pace in the clinical trial supplies market."

The clinical trial supplies market region is segmented into North America, Europe, Asia Pacific, Latin America Middle East and the

**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)

Africa. Asia Pacific region is anticipated to grow at a significant CAGR during the forecast period. The growth of the region is majorly driven by the increasing number of registered clinical trials. The increasing decentralization of clinical trials from China, India, and Japan due to presence of prominent players are engaged in providing services for clinical trial, supports market growth in the Asia Pacific.

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

- By Respondent: Supply Side- 80%, and Demand Side - 20%
- By Designation (Supply Side): Managers - 45%, CXOs & Directors - 30%, Executives- 25%
- By Region: North America -40%, Europe -25%, Asia-Pacific -20%, Latin America -10%, and Middle East and Africa -5%

List of Companies Profiled in the Report:

- Thermo Fisher Scientific Inc. (US)
- Catalent, Inc. (US)
- Eurofins (France)
- Piramal Pharma Solutions (India)
- PRA Health Sciences (Subsidiary of Icon Plc) (US)
- Marken (Subsidiary of UPS) (US)
- Parexel International (MA) Corporation (US)
- Biocair (UK)
- Almac Group (UK)
- Sharp Services, LLC (US)
- PCI Pharma Services (US)
- Nuvisan (Germany)
- Lonza Group (Switzerland)
- OCT Group LLC. (Latvia)
- Corex Logistics (Ireland)
- Acnos Pharma GMBH (Germany)
- Clinical Services International (UK)
- KLIFO A/S (Denmark)
- Clinigen Limited (UK)
- Ancillare LP (US)
- N-SIDE (Belgium)
- ADAllen Pharma (UK)
- Durbin ( Part of the Uniphar Group) (UK)
- Recipharm AB (Sweden)
- IPS Pharma (UK)

Research Coverage:

This report provides a detailed picture of the clinical trial supplies market. It aims at estimating the size and future growth potential of the market across different segments, such as service, phase, type, therapeutic area, end user and region. The report also includes an in-depth competitive analysis of the key market players, along with their company profiles, recent developments, and key market strategies.

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 supplies 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, opportunities, and challenges.

The report provides insights on the following pointers:

**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)

- Analysis of key drivers (Increasing R&D expenditure of pharmaceutical and biopharmaceutical companies, Increasing number of clinical trials, Growing decentralization of clinical trials, Rising prevalence of orphan and rare diseases, Increasing outsourcing activities in emerging Asian economies), restraints ( High cost of drug development), opportunities (Growth opportunities in emerging markets, Increased investments in development of biologics and biosimilars, Rising demand for specialized testing services) and challenges (High Cost of Clinical Trials) are influencing the growth of clinical trial supplies market.

- Service Development/Innovation: Detailed insights on newly launched services of the clinical trial supplies market.

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

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

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players include Thermo Fisher Scientific Inc. (US), Marken (US), Catalent, Inc. (US), Eurofins Scientific (France), and PRA Health Sciences (US), Parexel International (MA) Corporation (US), Biocair (UK), AlmacGroup (UK), Piramal Pharma Solutions (India), Sharp Services, LLC (US), PCI Pharma Services (US),

## Table of Contents:

1□INTRODUCTION□	40
1.1□STUDY OBJECTIVES□	40
1.2□MARKET DEFINITION□	40
1.2.1□INCLUSIONS & EXCLUSIONS□	41
1.3□MARKET SCOPE□	42
1.3.1□MARKETS COVERED□	42
1.3.2□YEARS CONSIDERED□	42
1.4□CURRENCY CONSIDERED□	43
1.5□RESEARCH LIMITATIONS□	43
1.6□STAKEHOLDERS□	43
1.7□SUMMARY OF CHANGES□	44
1.8□RECESSION IMPACT□	44
2□RESEARCH METHODOLOGY□	45
2.1□RESEARCH APPROACH□	45
FIGURE 1□RESEARCH DESIGN□	45
2.1.1□PRIMARY RESEARCH□	46
FIGURE 2□CLINICAL TRIAL SUPPLIES MARKET: PRIMARY RESPONDENTS□	46
2.1.2□SECONDARY DATA□	47
2.2□MARKET SIZE ESTIMATION□	48
FIGURE 3□CLINICAL TRIAL SUPPLIES MARKET SIZE ESTIMATION (SUPPLY-SIDE ANALYSIS), 2022□	48
FIGURE 4□MARKET SIZE ESTIMATION: APPROACH 1 (COMPANY REVENUE ANALYSIS-BASED ESTIMATION), 2022□	49
2.2.1□INSIGHTS FROM PRIMARY□	50
FIGURE 5□MARKET SIZE VALIDATION FROM PRIMARY EXPERTS□	50
2.2.2□SEGMENTAL ASSESSMENT (BY SERVICE, PHASE, TYPE, THERAPEUTIC AREA, END USER, AND REGION)□	51
FIGURE 6□MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH□	51
2.3□GROWTH RATE ASSUMPTIONS□	52
FIGURE 7□CLINICAL TRIAL SUPPLIES MARKET (DEMAND SIDE): GROWTH ANALYSIS OF DEMAND-SIDE FACTORS□	52
FIGURE 8□CLINICAL TRIAL SUPPLIES MARKET: GROWTH ANALYSIS OF DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES□	53
FIGURE 9□DATA TRIANGULATION METHODOLOGY□	54
2.4□STUDY ASSUMPTIONS□	54
2.5□RISK ANALYSIS□	55

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

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

www.scotts-international.com

2.6	RECESSION IMPACT ANALYSIS	55
TABLE 1	GLOBAL INFLATION RATE PROJECTIONS, 2021-2028 (% GROWTH)	56
TABLE 2	US HEALTH EXPENDITURE, 2019-2022 (USD MILLION)	56
TABLE 3	US HEALTH EXPENDITURE, 2023-2027 (USD MILLION)	56
3	EXECUTIVE SUMMARY	57
FIGURE 10	CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2023 VS. 2028 (USD MILLION)	57
FIGURE 11	CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2023 VS. 2028 (USD MILLION)	58
FIGURE 12	CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2023 VS. 2028 (USD MILLION)	58
FIGURE 13	CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2023 VS. 2028 (USD MILLION)	59
FIGURE 14	CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2023 VS. 2028 (USD MILLION)	59
FIGURE 15	GEOGRAPHICAL SNAPSHOT OF CLINICAL TRIAL SUPPLIES MARKET	60
4	PREMIUM INSIGHTS	61
4.1	CLINICAL TRIAL SUPPLIES MARKET OVERVIEW	61
FIGURE 16	RIISING PREVALENCE OF INFECTIOUS DISEASES TO DRIVE MARKET GROWTH	61
4.2	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE AND COUNTRY (2022)	62
FIGURE 17	SMALL-MOLECULE DRUGS ACCOUNTED FOR LARGEST SHARE OF NORTH AMERICAN CLINICAL TRIAL SUPPLIES MARKET IN 2022	62
4.3	CLINICAL TRIAL SUPPLIES MARKET SHARE, BY SERVICE, 2023 VS. 2028	63
FIGURE 18	LOGISTICS & DISTRIBUTION SERVICES TO CONTINUE TO DOMINATE MARKET IN 2028	63
4.4	CLINICAL TRIAL SUPPLIES MARKET SHARE, BY END USER, 2022	63
FIGURE 19	PHARMACEUTICAL & BIOTECHNOLOGY COMPANIES ACCOUNTED FOR LARGEST MARKET SHARE IN 2022	63
4.5	CLINICAL TRIAL SUPPLIES MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES	64
FIGURE 20	ASIA PACIFIC COUNTRIES TO REGISTER HIGHEST GROWTH RATES FROM 2023 TO 2028	64
5	MARKET OVERVIEW	65
5.1	INTRODUCTION	65
5.2	MARKET DYNAMICS	65
FIGURE 21	CLINICAL TRIAL SUPPLIES MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES	65
5.3	CLINICAL TRIAL SUPPLIES MARKET: IMPACT ANALYSIS	66
5.3.1	DRIVERS	66
5.3.1.1	Increasing R&D investments by biopharma companies	66
TABLE 4	R&D INVESTMENTS BY MAJOR PLAYERS (2022)	67
5.3.1.2	Growing number of clinical trials	67
FIGURE 22	NUMBER OF REGISTERED CLINICAL TRIALS (2011-2022)	67
FIGURE 23	ONGOING CLINICAL TRIALS, BY PHASE (% SHARE), 2022	68
5.3.1.3	Growing decentralization of clinical trials	68
5.3.1.4	Rising prevalence of orphan and rare diseases	69
FIGURE 24	OVERVIEW OF TOP 20 COMPANIES FOCUSING ON RARE DISEASES (AS OF 2023)	69
FIGURE 25	PERCENTAGE OF NEW ACTIVE SUBSTANCES LAUNCHED WITH ORPHAN DRUG DESIGNATION, 2012-2022	70
5.3.1.5	Increasing outsourcing activities in emerging Asian economies	70
5.3.2	RESTRAINTS	71
5.3.2.1	High cost of drug development	71
5.3.3	OPPORTUNITIES	72
5.3.3.1	Growth opportunities in emerging markets	72
5.3.3.2	Increased investments in development of biologics and biosimilars	72
FIGURE 26	TOTAL NUMBER OF NEW DRUGS (NEW CHEMICAL ENTITIES AND BIOLOGICS) APPROVED BY US FDA (2015-2022)	73
TABLE 5	LIST OF BIOLOGICS APPROVED BY US FDA, 2022	73
FIGURE 27	BIOSIMILAR APPROVALS AND LAUNCHES (2015-2022)	74

5.3.3.3	Rising demand for specialized testing services	74
5.3.4	CHALLENGES	75
5.3.4.1	High cost of clinical trials	75
5.4	TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES	75
FIGURE 28	REVENUE SHIFT AND NEW REVENUE POCKETS FOR CLINICAL TRIAL SERVICE PROVIDERS	75
5.5	PRICING ANALYSIS	76
5.5.1	INDICATIVE PRICING ANALYSIS OF OVERALL CLINICAL TRIALS, BY PHASE	76
TABLE 6	PHASE III ONCOLOGY CLINICAL TRIAL COST (US AND EUROPEAN COUNTRIES)	77
TABLE 7	PHASE I ONCOLOGY CLINICAL TRIAL COST (SPAIN)	77
5.6	TECHNOLOGY ANALYSIS	78
5.6.1	INTERACTIVE RESPONSE TECHNOLOGY (IRT)	78
5.7	VALUE CHAIN ANALYSIS	79
FIGURE 29	VALUE CHAIN ANALYSIS: RAW MATERIAL AND MANUFACTURING PHASES CONTRIBUTE MAXIMUM VALUE	79
5.8	ECOSYSTEM ANALYSIS	80
5.9	SUPPLY CHAIN ANALYSIS	81
TABLE 8	CLINICAL TRIAL SUPPLIES MARKET: SUPPLY CHAIN ANALYSIS	81
5.10	KEY CONFERENCES & EVENTS IN 2023-2024	82
TABLE 9	CLINICAL TRIAL SUPPLIES MARKET: DETAILED LIST OF CONFERENCES & EVENTS	82
5.11	REGULATORY ANALYSIS	83
5.11.1	REGULATORY LANDSCAPE FOR CLINICAL TRIAL SUPPLIES	83
5.11.1.1	North America	83
5.11.1.2	Europe	84
5.11.1.3	Asia Pacific	84
5.11.1.4	Rest of the World	85
5.11.2	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	86
TABLE 10	NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	86
TABLE 11	EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	87
TABLE 12	ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	88
TABLE 13	LATIN AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	89
TABLE 14	MIDDLE EAST & AFRICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	89
5.12	PORTER'S FIVE FORCES ANALYSIS	90
TABLE 15	CLINICAL TRIAL SUPPLIES MARKET: PORTER'S FIVE FORCES ANALYSIS	90
5.12.1	THREAT OF NEW ENTRANTS	90
5.12.2	THREAT OF SUBSTITUTES	90
5.12.3	BARGAINING POWER OF SUPPLIERS	90
5.12.4	BARGAINING POWER OF BUYERS	91
5.12.5	DEGREE OF COMPETITION	91
5.13	KEY STAKEHOLDERS & BUYING CRITERIA	92
5.13.1	KEY STAKEHOLDERS IN BUYING PROCESS	92
FIGURE 30	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS OF CLINICAL TRIAL SUPPLY SERVICES	92
5.13.2	BUYING CRITERIA FOR CLINICAL TRIAL SUPPLY SERVICES	93
FIGURE 31	KEY BUYING CRITERIA FOR END USERS	93
6	CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE	94
6.1	INTRODUCTION	95
TABLE 16	CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	95
6.2	LOGISTICS & DISTRIBUTION	95
6.2.1	INCREASING COMPLEXITY AND EVOLVING TREATMENT PROTOCOLS TO DRIVE DEMAND FOR LOGISTICS & DISTRIBUTION	

## SERVICES 95

TABLE 17 CLINICAL TRIAL SUPPLIES MARKET FOR LOGISTICS & DISTRIBUTION SERVICES, BY REGION, 2021-2028 (USD MILLION) 96

TABLE 18 NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR LOGISTICS & DISTRIBUTION SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 96

TABLE 19 EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR LOGISTICS & DISTRIBUTION SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 97

TABLE 20 ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR LOGISTICS & DISTRIBUTION SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 97

TABLE 21 LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR LOGISTICS & DISTRIBUTION SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 98

### 6.3 STORAGE & RETENTION 98

6.3.1 GROWING DEMAND FOR DIRECT-TO-PATIENT AND DIRECT-TO-SITE SERVICES TO DRIVE GROWTH 98

TABLE 22 CLINICAL TRIAL SUPPLIES MARKET FOR STORAGE & RETENTION SERVICES, BY REGION, 2021-2028 (USD MILLION) 99

TABLE 23 NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR STORAGE & RETENTION SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 99

TABLE 24 EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR STORAGE & RETENTION SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 100

TABLE 25 ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR STORAGE & RETENTION SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 100

TABLE 26 LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR STORAGE & RETENTION SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 101

### 6.4 PACKAGING, LABELING, AND BLINDING 101

6.4.1 RISING DEMAND FOR ADVANCED PACKAGING TO DRIVE SEGMENTAL GROWTH 101

TABLE 27 CLINICAL TRIAL SUPPLIES MARKET FOR PACKAGING, LABELING, AND BLINDING SERVICES, BY REGION, 2021-2028 (USD MILLION) 102

TABLE 28 NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PACKAGING, LABELING, AND BLINDING SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 102

TABLE 29 EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR PACKAGING, LABELING, AND BLINDING SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 103

TABLE 30 ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR PACKAGING, LABELING, AND BLINDING SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 103

TABLE 31 LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR LABELING, AND BLINDING SERVICES, COUNTRY, 2021-2028 (USD MILLION) 104

### 6.5 MANUFACTURING 104

6.5.1 GROWING FOCUS OF COMPANIES ON INCREASING MANUFACTURING CAPACITIES TO DRIVE MARKET GROWTH 104

TABLE 32 CLINICAL TRIAL SUPPLIES MARKET FOR MANUFACTURING SERVICES, BY REGION, 2021-2028 (USD MILLION) 105

TABLE 33 NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR MANUFACTURING SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 105

TABLE 34 EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR MANUFACTURING SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 106

TABLE 35 ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR MANUFACTURING SERVICES, BY COUNTRY, 2021-2028 (USD MILLION) 106

TABLE 36 LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR MANUFACTURING SERVICES, COUNTRY, 2021-2028 (USD MILLION) 107

### 6.6 COMPARATOR SOURCING 107

6.6.1 INTENSE MARKET COMPETITION AND RISING NUMBER OF CLINICAL TRIALS IN EMERGING COUNTRIES TO DRIVE GROWTH 107

TABLE 37 CLINICAL TRIAL SUPPLIES MARKET FOR COMPARATOR SOURCING SERVICES, BY REGION, 2021-2028 (USD MILLION) 108

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

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

www.scotts-international.com

TABLE 38	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR COMPARATOR SOURCING SERVICES, BY COUNTRY, 2021-2028 (USD MILLION)	108
TABLE 39	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR COMPARATOR SOURCING SERVICES, BY COUNTRY, 2021-2028 (USD MILLION)	109
TABLE 40	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR COMPARATOR SOURCING SERVICES, BY COUNTRY, 2021-2028 (USD MILLION)	109
TABLE 41	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR COMPARATOR SOURCING SERVICES, BY COUNTRY, 2021-2028 (USD MILLION)	110
6.7	OTHER SERVICES	110
TABLE 42	CLINICAL TRIAL SUPPLIES MARKET FOR OTHER SERVICES, BY REGION, 2021-2028 (USD MILLION)	111
TABLE 43	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR OTHER SERVICES, BY COUNTRY, 2021-2028 (USD MILLION)	111
TABLE 44	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR OTHER SERVICES, BY COUNTRY, 2021-2028 (USD MILLION)	112
TABLE 45	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR OTHER SERVICES, BY COUNTRY, 2021-2028 (USD MILLION)	112
TABLE 46	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR OTHER SERVICES, BY COUNTRY, 2021-2028 (USD MILLION)	113
7	CLINICAL TRIAL SUPPLIES MARKET, BY PHASE	114
7.1	INTRODUCTION	115
TABLE 47	CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	115
7.2	PHASE III	115
7.2.1	LARGE PATIENT POPULATION ASSOCIATED WITH PHASE III TRIALS TO DRIVE DEMAND	115
TABLE 48	CLINICAL TRIAL SUPPLIES MARKET FOR PHASE III CLINICAL TRIALS, BY REGION, 2021-2028 (USD MILLION)	116
TABLE 49	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE III CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	116
TABLE 50	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE III CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	117
TABLE 51	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE III CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	117
TABLE 52	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE III CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	118
7.3	PHASE II	118
7.3.1	ABILITY OF PHASE II CLINICAL TRIALS TO PROVIDE CLARITY ON EFFECTIVENESS AND SAFETY OF DRUGS TO DRIVE MARKET GROWTH	118
TABLE 53	CLINICAL TRIAL SUPPLIES MARKET FOR PHASE II CLINICAL TRIALS, BY REGION, 2021-2028 (USD MILLION)	119
TABLE 54	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE II CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	119
TABLE 55	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE II CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	120
TABLE 56	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE II CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	120
TABLE 57	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE II CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	121
7.4	PHASE I	121
7.4.1	IMPORTANCE OF QUALITY CLINICAL TRIAL SUPPLIES IN PHASE I CLINICAL TRIALS TO BOOST MARKET	121
TABLE 58	CLINICAL TRIAL SUPPLIES MARKET FOR PHASE I CLINICAL TRIALS, BY REGION, 2021-2028 (USD MILLION)	121
TABLE 59	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE I CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	122
TABLE 60	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE I CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	122
TABLE 61	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE I CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)	123
TABLE 62	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE I CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD	

**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)

MILLION)123

7.5 PHASE IV124

7.5.1 INCREASING NUMBER OF STUDIES UNDER PHASE IV TRIAL TO SUPPORT GROWTH124

TABLE 63 CLINICAL TRIAL SUPPLIES MARKET FOR PHASE IV CLINICAL TRIALS, BY REGION, 2021-2028 (USD MILLION)124

TABLE 64 NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE IV CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)124

TABLE 65 EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE IV CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)125

TABLE 66 ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE IV CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)125

TABLE 67 LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PHASE IV CLINICAL TRIALS, BY COUNTRY, 2021-2028 (USD MILLION)126

7.6 BA/BE STUDIES126

7.6.1 INCREASING PATENT EXPIRATION TO INCREASE DEMAND FOR BA/BE STUDIES126

TABLE 68 CLINICAL TRIAL SUPPLIES MARKET FOR BA/BE STUDIES, BY REGION, 2021-2028 (USD MILLION)127

TABLE 69 NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR BA/BE STUDIES, BY COUNTRY, 2021-2028 (USD MILLION)127

TABLE 70 EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR BA/BE STUDIES, BY COUNTRY, 2021-2028 (USD MILLION)128

TABLE 71 ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR BA/BE STUDIES, BY COUNTRY, 2021-2028 (USD MILLION)128

TABLE 72 LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR BA/BE STUDIES, BY COUNTRY, 2021-2028 (USD MILLION)129

8 CLINICAL TRIAL SUPPLIES MARKET, BY TYPE130

8.1 INTRODUCTION131

TABLE 73 CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)131

8.2 SMALL-MOLECULE DRUGS131

8.2.1 LOW COST OF DEVELOPING SMALL-MOLECULE DRUGS TO DRIVE MARKET GROWTH131

TABLE 74 CLINICAL TRIAL SUPPLIES MARKET FOR SMALL-MOLECULE DRUGS, BY REGION, 2021-2028 (USD MILLION)132

TABLE 75 NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR SMALL-MOLECULE DRUGS, BY COUNTRY, 2021-2028 (USD MILLION)132

TABLE 76 EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR SMALL-MOLECULE DRUGS, BY COUNTRY, 2021-2028 (USD MILLION)133

TABLE 77 ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR SMALL-MOLECULE DRUGS, BY COUNTRY, 2021-2028 (USD MILLION)133

TABLE 78 LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR SMALL-MOLECULE DRUGS, BY COUNTRY, 2021-2028 (USD MILLION)134

8.3 BIOLOGIC DRUGS134

8.3.1 RELATIVELY LOW RATE OF ATTRITION OF BIOLOGIC DRUGS COMPARED TO SMALL-MOLECULE DRUGS TO BOOST GROWTH134

TABLE 79 CLINICAL TRIAL SUPPLIES MARKET FOR BIOLOGIC DRUGS, BY REGION, 2021-2028 (USD MILLION)135

TABLE 80 NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR BIOLOGIC DRUGS, BY COUNTRY, 2021-2028 (USD MILLION)135

TABLE 81 EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR BIOLOGIC DRUGS, BY COUNTRY, 2021-2028 (USD MILLION)136

TABLE 82 ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR BIOLOGIC DRUGS, BY COUNTRY, 2021-2028 (USD MILLION)136

TABLE 83 LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR BIOLOGIC DRUGS, BY COUNTRY, 2021-2028 (USD MILLION)137

8.4 MEDICAL DEVICES137

8.4.1 INCREASING NUMBER OF TRIALS FOR MEDICAL DEVICES TO SUPPORT GROWTH137

TABLE 84 CLINICAL TRIAL SUPPLIES MARKET FOR MEDICAL DEVICES, BY REGION, 2021-2028 (USD MILLION)138

TABLE 85 NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR MEDICAL DEVICES, BY COUNTRY, 2021-2028 (USD MILLION)138

TABLE 86 EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR MEDICAL DEVICES, BY COUNTRY, 2021-2028 (USD MILLION)139

TABLE 87 ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR MEDICAL DEVICES, BY COUNTRY, 2021-2028 (USD MILLION)139

TABLE 88 LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR MEDICAL DEVICES, BY COUNTRY, 2021-2028 (USD MILLION)140

9 CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA141

9.1 INTRODUCTION142

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

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

www.scotts-international.com



TABLE 89	CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	142
9.2	ONCOLOGY	142
9.2.1	GROWING STUDIES ON CANCER THERAPEUTICS TO DRIVE MARKET GROWTH	142
FIGURE 32	US CANCER INCIDENCE IN MALES, BY TYPE (2022)	143
FIGURE 33	US CANCER INCIDENCE IN FEMALES, BY TYPE (2022)	143
FIGURE 34	GLOBAL ONCOLOGY-RELATED CLINICAL TRIALS, 2010-2021 (THOUSAND)	144
TABLE 90	NEW FDA-APPROVED ONCOLOGY DRUGS (2023)	145
TABLE 91	CLINICAL TRIAL SUPPLIES MARKET FOR ONCOLOGY, BY REGION, 2021-2028 (USD MILLION)	146
TABLE 92	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR ONCOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	146
TABLE 93	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR ONCOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	147
TABLE 94	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR ONCOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	147
TABLE 95	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR ONCOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	148
9.3	INFECTIOUS DISEASES	148
9.3.1	INCREASING CASES OF INFECTIOUS DISEASES TO ACCELERATE EFFORTS TO DEVELOP NEW DRUGS	148
TABLE 96	CLINICAL TRIAL SUPPLIES MARKET FOR INFECTIOUS DISEASES, BY REGION, 2021-2028 (USD MILLION)	149
TABLE 97	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR INFECTIOUS DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	149
TABLE 98	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR INFECTIOUS DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	150
TABLE 99	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR INFECTIOUS DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	150
TABLE 100	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR INFECTIOUS DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	151
9.4	NEUROLOGY	151
9.4.1	GROWING INVESTMENTS BY PHARMACEUTICAL COMPANIES FOR NEUROLOGY RESEARCH TO DRIVE GROWTH	151
TABLE 101	LIST OF PIPELINE DRUGS FOR NEUROLOGICAL DISORDERS (2020)	152
TABLE 102	CLINICAL TRIAL SUPPLIES MARKET FOR NEUROLOGY, BY REGION, 2021-2028 (USD MILLION)	152
TABLE 103	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR NEUROLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	153
TABLE 104	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR NEUROLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	153
TABLE 105	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR NEUROLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	154
TABLE 106	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR NEUROLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	154
9.5	METABOLIC DISORDERS	155
9.5.1	INCREASING PREVALENCE OF DIABETES AND OTHER METABOLIC DISORDERS TO DRIVE MARKET GROWTH	155
FIGURE 35	ESTIMATED NUMBER OF INDIVIDUALS WITH DIABETES, 2000-2045 (MILLION)	155
TABLE 107	CLINICAL TRIAL SUPPLIES MARKET FOR METABOLIC DISORDERS, BY REGION, 2021-2028 (USD MILLION)	156
TABLE 108	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR METABOLIC DISORDERS, BY COUNTRY, 2021-2028 (USD MILLION)	157
TABLE 109	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR METABOLIC DISORDERS, BY COUNTRY, 2021-2028 (USD MILLION)	157
TABLE 110	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR METABOLIC DISORDERS, BY COUNTRY, 2021-2028 (USD MILLION)	158
TABLE 111	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR METABOLIC DISORDERS, BY COUNTRY, 2021-2028 (USD MILLION)	158
9.6	IMMUNOLOGY	159
9.6.1	CONTINUOUS GROWTH IN CLINICAL STUDIES FOR IMMUNE SYSTEM DISEASES TO FUEL DEMAND FOR CLINICAL TRIAL SUPPLIES	159
TABLE 112	LIST OF PIPELINE DRUGS FOR IMMUNOLOGICAL DISORDERS (2022)	159
TABLE 113	CLINICAL TRIAL SUPPLIES MARKET FOR IMMUNOLOGY, BY REGION, 2021-2028 (USD MILLION)	160
TABLE 114	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR IMMUNOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	160
TABLE 115	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR IMMUNOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	161

**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)

TABLE 116	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR IMMUNOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	161
TABLE 117	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR IMMUNOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	162
9.7	CARDIOLOGY	162
9.7.1	GROWING INVESTMENTS BY PHARMACEUTICAL COMPANIES FOR CVD RESEARCH TO DRIVE GROWTH	162
TABLE 118	LIST OF PIPELINE DRUGS FOR CARDIOVASCULAR DISEASES (2023)	163
TABLE 119	CLINICAL TRIAL SUPPLIES MARKET FOR CARDIOLOGY, BY REGION, 2021-2028 (USD MILLION)	164
TABLE 120	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR CARDIOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	164
TABLE 121	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR CARDIOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	165
TABLE 122	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR CARDIOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	165
TABLE 123	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR CARDIOLOGY, BY COUNTRY, 2021-2028 (USD MILLION)	166
9.8	GENETIC & RARE DISEASES	166
9.8.1	INCREASING R&D FOR DEVELOPMENT OF EFFECTIVE DRUGS TO DRIVE DEMAND	166
TABLE 124	CLINICAL TRIAL SUPPLIES MARKET FOR GENETIC & RARE DISEASES, BY REGION, 2021-2028 (USD MILLION)	167
TABLE 125	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR GENETIC & RARE DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	167
TABLE 126	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR GENETIC & RARE DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	168
TABLE 127	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR GENETIC & RARE DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	168
TABLE 128	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR GENETIC & RARE DISEASES, BY COUNTRY, 2021-2028 (USD MILLION)	169
9.9	OTHER THERAPEUTIC AREAS	169
TABLE 129	LIST OF PIPELINE DRUGS FOR SKIN DISEASES (2022)	170
TABLE 130	CLINICAL TRIAL SUPPLIES MARKET FOR OTHER THERAPEUTIC AREAS, BY REGION, 2021-2028 (USD MILLION)	170
TABLE 131	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2021-2028 (USD MILLION)	171
TABLE 132	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2021-2028 (USD MILLION)	171
TABLE 133	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2021-2028 (USD MILLION)	172
TABLE 134	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2021-2028 (USD MILLION)	172
10	CLINICAL TRIAL SUPPLIES MARKET, BY END USER	173
10.1	INTRODUCTION	174
TABLE 135	CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	174
10.2	PHARMACEUTICAL & BIOTECHNOLOGY COMPANIES	174
10.2.1	INCREASING OUTSOURCING OF CLINICAL TRIAL SUPPLIES BY PHARMA & BIOTECH COMPANIES TO BOOST MARKET	174
TABLE 136	CLINICAL TRIAL SUPPLIES MARKET FOR PHARMACEUTICAL & BIOTECHNOLOGY COMPANIES, BY REGION, 2021-2028 (USD MILLION)	175
TABLE 137	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PHARMACEUTICAL & BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021-2028 (USD MILLION)	175
TABLE 138	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR PHARMACEUTICAL & BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021-2028 (USD MILLION)	176
TABLE 139	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR PHARMACEUTICAL & BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021-2028 (USD MILLION)	176
TABLE 140	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR PHARMACEUTICAL & BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021-2028 (USD MILLION)	177

10.3	CONTRACT RESEARCH ORGANIZATIONS	177
10.3.1	INCREASING OUTSOURCING OF CLINICAL TRIALS TO DRIVE ADOPTION OF CLINICAL TRIAL SUPPLIES AMONG CROs	177
TABLE 141	CLINICAL TRIAL SUPPLIES MARKET FOR CONTRACT RESEARCH ORGANIZATIONS, BY REGION, 2021-2028 (USD MILLION)	177
TABLE 142	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR CONTRACT RESEARCH ORGANIZATIONS, BY COUNTRY, 2021-2028 (USD MILLION)	178
TABLE 143	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR CONTRACT RESEARCH ORGANIZATIONS, BY COUNTRY, 2021-2028 (USD MILLION)	178
TABLE 144	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR CONTRACT RESEARCH ORGANIZATIONS, BY COUNTRY, 2021-2028 (USD MILLION)	179
TABLE 145	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR CONTRACT RESEARCH ORGANIZATIONS, BY COUNTRY, 2021-2028 (USD MILLION)	179
10.4	MEDICAL DEVICE COMPANIES	179
10.4.1	INCREASING NUMBER OF TRIALS OF MEDICAL DEVICES TO DRIVE MARKET	179
TABLE 146	CLINICAL TRIAL SUPPLIES MARKET FOR MEDICAL DEVICE COMPANIES, BY REGION, 2021-2028 (USD MILLION)	180
TABLE 147	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR MEDICAL DEVICE COMPANIES, BY COUNTRY, 2021-2028 (USD MILLION)	180
TABLE 148	EUROPE: CLINICAL TRIAL SUPPLIES MARKET FOR MEDICAL DEVICE COMPANIES, BY COUNTRY, 2021-2028 (USD MILLION)	181
TABLE 149	ASIA PACIFIC: CLINICAL TRIAL SUPPLIES MARKET FOR MEDICAL DEVICE COMPANIES, BY COUNTRY, 2021-2028 (USD MILLION)	181
TABLE 150	LATIN AMERICA: CLINICAL TRIAL SUPPLIES MARKET FOR MEDICAL DEVICE COMPANIES, BY COUNTRY, 2021-2028 (USD MILLION)	182
11	CLINICAL TRIAL SUPPLIES MARKET, BY REGION	183
11.1	INTRODUCTION	184
TABLE 151	CLINICAL TRIAL SUPPLIES MARKET, BY REGION, 2021-2028 (USD MILLION)	184
11.2	NORTH AMERICA	184
FIGURE 36	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET SNAPSHOT	185
TABLE 152	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET, BY COUNTRY, 2021-2028 (USD MILLION)	185
TABLE 153	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	186
TABLE 154	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	186
TABLE 155	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	187
TABLE 156	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	187
TABLE 157	NORTH AMERICA: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	188
11.2.1	US	188
11.2.1.1	Increasing R&D investments to drive market growth in US	188
TABLE 158	US: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	189
TABLE 159	US: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	189
TABLE 160	US: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	190
TABLE 161	US: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	190
TABLE 162	US: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	191
11.2.2	CANADA	191
11.2.2.1	Growing preference of pharmaceutical companies to conduct trials in Canada to favor market growth	191
TABLE 163	CANADA: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	192
TABLE 164	CANADA: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	192
TABLE 165	CANADA: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	193
TABLE 166	CANADA: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	193

**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)

TABLE 167	CANADA: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	194
11.2.3	NORTH AMERICA: RECESSION IMPACT	194
11.3	EUROPE	195
TABLE 168	EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY COUNTRY, 2021-2028 (USD MILLION)	195
TABLE 169	EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	196
TABLE 170	EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	196
TABLE 171	EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	197
TABLE 172	EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	197
TABLE 173	EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	198
11.3.1	GERMANY	198
11.3.1.1	Growing number of sponsored trials to boost demand for clinical trial supplies in Germany	198
TABLE 174	GERMANY: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	199
TABLE 175	GERMANY: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	199
TABLE 176	GERMANY: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	200
TABLE 177	GERMANY: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	200
TABLE 178	GERMANY: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	201
11.3.2	UK	201
11.3.2.1	Government policies leading to costlier R&D and supply chain restrictions post Brexit to limit market growth	201
TABLE 179	UK: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	202
TABLE 180	UK: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	202
TABLE 181	UK: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	203
TABLE 182	UK: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	203
TABLE 183	UK: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	204
11.3.3	FRANCE	204
11.3.3.1	Presence of leading pharmaceutical companies to support market growth in France	204
TABLE 184	FRANCE: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	205
TABLE 185	FRANCE: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	205
TABLE 186	FRANCE: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	206
TABLE 187	FRANCE: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	206
TABLE 188	FRANCE: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	207
11.3.4	ITALY	207
11.3.4.1	Increasing number of drug approvals to drive market for clinical trial supplies in Italy	207
TABLE 189	ITALY: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	207
TABLE 190	ITALY: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	208
TABLE 191	ITALY: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	208
TABLE 192	ITALY: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	209
TABLE 193	ITALY: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	209
11.3.5	SPAIN	210
11.3.5.1	Increasing biologics production to support market growth in Spain	210
TABLE 194	SPAIN: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	210
TABLE 195	SPAIN: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	211
TABLE 196	SPAIN: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	211
TABLE 197	SPAIN: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	212
TABLE 198	SPAIN: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	212
11.3.6	SWITZERLAND	213
11.3.6.1	Growing R&D efforts to provide growth opportunities for clinical trial supplies market in Switzerland	213
TABLE 199	SWITZERLAND: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	213

**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)

TABLE 200	SWITZERLAND: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	214
TABLE 201	SWITZERLAND: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	214
TABLE 202	SWITZERLAND: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	215
TABLE 203	SWITZERLAND: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	215
11.3.7	NETHERLANDS	216
11.3.7.1	Increasing pharmaceutical production to boost clinical trial supplies market in Netherlands	216
TABLE 204	NETHERLANDS: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	216
TABLE 205	NETHERLANDS: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	217
TABLE 206	NETHERLANDS: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	217
TABLE 207	NETHERLANDS: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	218
TABLE 208	NETHERLANDS: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	218
11.3.8	REST OF EUROPE	219
TABLE 209	REST OF EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY SERVICE, 2021-2028 (USD MILLION)	220
TABLE 210	REST OF EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY PHASE, 2021-2028 (USD MILLION)	220
TABLE 211	REST OF EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY TYPE, 2021-2028 (USD MILLION)	221
TABLE 212	REST OF EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY THERAPEUTIC AREA, 2021-2028 (USD MILLION)	221
TABLE 213	REST OF EUROPE: CLINICAL TRIAL SUPPLIES MARKET, BY END USER, 2021-2028 (USD MILLION)	222
11.3.9	EUROPE: RECESSION IMPACT	222

**Clinical Trial Supplies Market by Services (Manufacturing, Packaging, Logistics),  
Phases, Type (Small Molecules, Biologics), Therapeutic Areas (Oncology, CVD,  
Infectious, Immunology), End User (Pharma, Biotech, CROs), & Region - Global  
Forecast to 2028**

Market Report | 2023-10-09 | 328 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