

Drug Discovery Services Market by Process (Target Validation, Hit-to-Lead, Lead Optimization), Type (Chemistry, Biology), Therapeutic Area (Oncology, Neurology, Infectious, CVD), Drug Type (Small Molecules, Biologics), End User - Global Forecast to 2030

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Report description:

The global drug discovery services market is anticipated to reach USD 27.23 billion in 2030 from USD 16.36 billion in 2025, with a significant CAGR of 10.7%. The market is growing strongly at a considerable CAGR due to rising R&D investments of pharmaceutical and biopharmaceutical firms. As the pipeline of R&D expands, the requirement for outsourcing analytical testing is set to rise, in addition to the research initiatives on the rare diseases and orphan drugs. Furthermore, the high costs of in-house drug development have also contributed to this trend. Industry players are likely to witness healthy growth opportunities due to the technological advancement, new drug discovery techniques, patent expiry, and rising demand for specialized testing services among end users.

"Chemistry services dominated the type segment"

Based on type, the drug discovery services market is divided into chemistry services, and biology services. The chemistry services segment is further divided into synthetic chemistry services, analytical chemistry services, other chemistry services. The development of technologies like combinatorial chemistry and structure-based drug design has contributed to the growth of chemistry services. Chemistry's extensive use in drug discovery particularly for lead molecule identification, lead modification or optimization, scale-up of the optimized lead for further drug development processes, and efficacy testing, has contributed to the growing demand for the segment.

"The hit-to-lead identification dominated the process segment"

Based on process, the drug discovery services market includes target selection, target validation, hit-to-lead identification, lead

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optimization, and candidate validation. The hit-to-lead identification services dominated the market. Growth in the hit-to-lead identification services market is predetermined due to its crucial place in drug discovery, being the maximum revenue-generating process. Many CROs offer these services to pharmaceutical companies. Moreover, key players are focusing on improving this critical step of drug discovery.

"The small molecules dominated the drug type segment"

Based on drug type, the drug discovery services market can be segmented into small molecules, and biologics. Small molecules would hold largest share in the market. The increasing growth of the small molecules can be attributed to several factors such as ease of working with, low costs, and increasing startup and new entrants focusing on small-molecule drug development. Small molecules can also easily enter the cells thanks to their low molecular weights. They may act on other molecules and kill cancer cells. As such, small molecules or small-molecule inhibitors are used extensively for many targeted therapies.

"Cardiovascular diseases segment is anticipated to grow at a great pace"

The therapeutic area segment is divided into oncology, infectious diseases, cardiovascular diseases, neurological diseases, immunological disorders, endocrine & metabolic disorders, respiratory disorders, digestive system diseases, genitourinary diseases & women's health, and other therapeutic areas. The market for cardiovascular diseases is dominated due to high prevalence of cardiovascular diseases, rising geriatric population, and increasing partnerships between CROs and pharmaceutical & biotechnology companies. The integration of genetic and personalized medicine innovations will also support the growth of cardiovascular disease therapeutic discovery and development.

"Pharmaceutical & Biotechnology Companies dominated the segment"

Based on the end users, the market is segmented into pharmaceutical & biotechnology companies, academic institutes, and other end users. Pharmaceutical & biotechnology companies dominated the segment in 2024. The largest share of pharmaceutical and biotechnology companies in the drug discovery services market is due to the growing R&D expenditure for new molecules development, the increasing outsourcing of clinical services by these companies, and a strong pipeline of biotechnology companies to increase profit margins and reduce the time of drug development.

"US to grow at the highest CAGR for North America drug discovery services market"

The market is segmented by region into North America, Europe, Asia Pacific, Latin America, the Middle East, and Africa. North America dominated the drug discovery services market in 2024 and is estimated to continue dominance during the forecast period. US leads the North American market, driven by the presence of key players. The country's focus on R&D expenditure, and rapid growth in the biosimilar and biologics markets further boosts its leadership in the market. European drug discovery services market is experiencing steady growth, supported by demographic changes, the growing prevalence of diseases, and investments in R&D.

In-depth interviews have been conducted with chief executive officers (CEOs), Directors, and other executives from various key organizations operating in the drug discovery services market.

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

-□By Company Type: Tier 1 - 55%, Tier 2 - 25%, and Tier 3 - 20%

-□By Designation: Directors - 45%, Managers - 30%, and Others - 25%

-□By Region: North America -40%, Europe -25%, Asia-Pacific -25%, Latin America -5% and Middle East & Africa- 5%

Thermo Fisher Scientific Inc. (US), Labcorp (US), Eurofins Scientific (Germany), Charles River Laboratories (US), WuXi AppTec (China), Pharmaron (China), Evotec (Germany), Syngene International Limited (India), Curia Global, Inc. (US), Aragen Life Sciences Ltd. (India), Jubilant Pharmova Limited (India), Dr. Reddy's Laboratories Ltd. (India), Frontage Holdings Corporation (US), GenScript (US), Sygnature Discovery (UK), and Piramal Enterprises Ltd. (India) are some of the key players in the drug discovery services market.

Research Coverage:

Drug discovery services market report is segmented based on process (target selection, target validation, hit-to-lead

identification, lead optimization, and candidate validation), by type [(chemistry services (synthetic chemistry services, analytical chemistry services, other chemistry services), and biology services (in vitro profiling services, toxicology services, and other biology services)], by drug type (small molecules, and biologics), by therapeutic area (oncology, infectious diseases, cardiovascular diseases, neurological diseases, immunological disorders, endocrine & metabolic disorders, respiratory disorders, digestive system diseases, genitourinary diseases & women's health, and other therapeutic areas), by end user (pharmaceutical & biotechnology companies, academic institutes, and other end users), and region (North America, Europe, Asia Pacific, the Middle East & Africa, and Latin America). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the high content screening market. A detailed analysis of the key industry players has been done to provide insights into their business overview, products, key strategies, collaborations, partnerships, and agreements. New launches, collaborations and acquisitions, and recent developments associated with the high content screening market.

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 drug discovery services 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:

- Analysis of key drivers (Growing R&D expenditure in the pharmaceutical & biopharmaceutical industry, Increasing demand for outsourcing analytical testing services, Initiatives for research on rare diseases and orphan drugs, High cost of in-house drug development), restraints (Stringent regulations governing drug discovery and animal usages), opportunities (Growth in drugs and biologics market, Rising demand for specialized testing services among end users, Patent Expiry, High growth prospect in emerging markets) and Challenges (Economic uncertainties worldwide) influencing the growth of the market.
- Product Development/Innovation: Detailed insights on upcoming technologies in drug discovery services, research and development activities, and new service launches in the drug discovery services market.
- Market Development: Comprehensive information about lucrative markets - the report analyses the market across varied regions.
- Market Diversification: Exhaustive information about new services, untapped geographies, recent developments, and investments in the drug discovery services market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players Charles River Laboratories (US), Thermo Fisher Scientific Inc. (US), WuXi AppTec (China), and Pharmaron (China), and Labcorp (US), among others.

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