

Brazil Clinical Trials Market Report and Forecast 2025-2034

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Report description:

The Brazil clinical trials market was valued at USD 1.51 Billion in 2024, driven by rising biotechnology investments and strengthened regulatory support with enhanced infrastructure initiatives in the region. The market is anticipated to grow at a CAGR of 4.90% during the forecast period of 2025-2034, with the values likely to reach USD 2.44 Billion by 2034. The increasing prevalence of conditions such as diabetes, cancer, and cardiovascular diseases is driving demand for new treatments and, in turn, clinical research.

Brazil Clinical Trials Market Overview

According to Regulatory Focus factsheet, Brazil registered around 10,000 clinical studies by April 2024. Clinical trials are essential for advancing medical knowledge and ensuring the approval of new therapies. The market is growing rapidly due to favorable government policies, increasing investments, and a large, diverse patient population. Brazil's expanding healthcare infrastructure, combined with a rising demand for clinical research activities, makes the country an attractive destination for conducting clinical trials.

Brazil Clinical Trials Market Growth Drivers

Rising Cancer Incidence to Accelerate the Market Growth

The increasing incidence of cancer is a major growth driver for the clinical trials market in Brazil. According to data published in July 2024, new cancer cases in Brazil rose significantly from approximately 489,000 in 2010 to about 704,000 in 2023. This sharp increase, especially in prostate cancer cases, is intensifying the need for innovative therapies, thereby supporting continued market growth in the forecast period.

Brazil Clinical Trials Market Trends

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Some of the notable trends in the market include the advent of new regulations to support clinical trials in the region:

Ease in Clinical Trial Regulations to Boost Market Growth

The implementation of new legislation, aimed at strengthening participant protections and streamlining trial processes is a significant trend in the market. In June 2024, the Brazilian government, in collaboration with the Brazilian Health Regulatory Agency (ANVISA) changed its laws governing clinical trials. Signed in May 2024 and effective from August, the law consolidated existing regulations, introduced a national ethics system, and decentralized ethical oversight. By accelerating protocol reviews and ensuring post-trial access to medicines, such alterations are expected to boost clinical research efficiency and market growth in the coming years.

Brazil Clinical Trials Market Segmentation

The market report offers a detailed analysis of the market based on the following segments:

Market Breakup by Phase

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

Market Breakup by Service Type

- Laboratory Services
- Bioanalytical Testing Services
 - ??- Cell-Based Assay
 - ??- Virology Testing
 - ??- Serology, Immunogenicity, & Neutralizing Antibodies
 - ??- PK/PD Testing
 - ??- Method Development, Optimization & Validation
 - ??- Biomarker Testing
 - ??- Other Bioanalytical Testing Services
- Decentralized Clinical Trial Services
- Patient Recruitment
- Site Identification
- Analytical Testing Services
- Clinical Trial Supply & Logistic Services
- Protocol Designing
- Clinical Trial Data Management Services
- Medical Device Testing Services
- Other Service

Market Breakup by Therapeutic Areas

- Oncology

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- Infectious Diseases
- Neurology
- Metabolic Disorders
- Immunology
- Cardiology
- Genetic Diseases
- Women's Health
- Other Therapeutic Areas

Market Breakup by Type of Pharmaceutical Product

- Small Molecules
- Monoclonal Antibodies
- Vaccine
- Cell & Gene Therapy
- Other Applications

Market Breakup by Study Design

- Interventional
- Observational

Market Breakup by Delivery Model

- Full-Service Outsourcing (FSO) Model
- Functional Service Provider (FSP) Model
- Hybrid Model

Market Breakup by End User

- Pharmaceutical & Biopharmaceutical Companies
- Medical Devices Companies
- Academic Institutes
- Other

Brazil Clinical Trials Market Share

Patient Recruitment Services Type Segmentation to Lead the Brazil Clinical Trials Market

The market is divided into a variety of service types, including laboratory services, bioanalytical testing services, patient recruitment, decentralized clinical trials, clinical trial supply and logistics, and more. Among these, patient recruitment services are expected to dominate. The effectiveness of a clinical trial often depends on the speed and accuracy of patient recruitment, which is essential for timely trial completion and accurate results. As the demand for clinical trials across therapeutic areas continues to grow, efficient patient recruitment will be a significant driver of market success in Brazil.

Oncology to Witness Substantial Growth in the Market Segmentation by Therapeutic Areas

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There is an emphasis clinical trials on several therapeutic areas, including oncology, infectious diseases, neurology, cardiology, and metabolic disorders, among others. According to projections by the Brazilian National Cancer Institute (INCA), Brazil is expected to record over 704,000 new cancer cases each year between 2023 and 2025, excluding non-melanoma skin cancers. As a result, oncology is projected to be the leading therapeutic area due to the increasing prevalence of cancer in Brazil and worldwide. With rising investments in cancer research and the growing demand for new treatment options, clinical trials in oncology are expected to dominate. These trials are pivotal for the development of cutting-edge cancer therapies, making oncology a focal point of clinical research in the Brazilian market.

Leading Players in the Brazil Clinical Trials Market

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

Cohortias

Cohortias, established as a full-service Contract Research Organization (CRO) that specializes in clinical trials across Latin America. Established to meet the growing demand for clinical research, Cohortias offers services like early-phase studies, rescue studies, and phase II and III trials, along with medical device trials. They are renowned for their expansive network, with over 250 sites and 10,500 conducted studies. Cohortias focuses on therapeutic areas including oncology, cardiology, and infectious diseases, playing a pivotal role in advancing clinical research in Brazil and the wider Latin American region.

Parexel Brazil

Parexel operates across multiple regions, including Brazil, where it supports clinical trial services. The company offers end-to-end clinical development services. Parexel specializes in phases I-IV trials, helping accelerate drug development globally. Their involvement in Brazil's clinical trials market is vital due to its vast patient population and the company's deep expertise in clinical, regulatory, and market access solutions, supporting a wide range of trials, including rare diseases and vaccines.

PPD (Thermo Fisher Scientific Inc.)

PPD, a Thermo Fisher Scientific company, focuses on early-phase clinical trials, particularly Phase I and Ib studies, assessing the clinical relevance and commercial viability of compounds. Their services include patient recruitment, investigator engagement, and trial design, ensuring the success of subsequent trials. PPD's expertise in early clinical development leverages extensive global resources, making them a significant player in the clinical trials market, supporting both patient safety and regulatory submission processes.

ICON plc

ICON plc is a prominent global Contract Research Organization (CRO). It was established in 1990 and is headquartered in Dublin, Ireland. With a significant presence in Latin America, including Brazil, ICON conducts clinical trials across various therapeutic areas, including cardiovascular, cancer, and infectious diseases. ICON's expertise in local regulations, patient enrollment, and cultural understanding allows it to effectively manage complex clinical trials. The company's commitment to high-quality research and patient retention has solidified its leadership in Brazil's growing clinical trials market, making it a trusted partner for global and regional study delivery.

Other key players in the market include Fractals Clinical Research, IQVIA Inc., Medpace, ACTIVA-CRO, and Centre International de Developpement Pharmaceutique Ltee (CIDP).

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Key Questions Answered in the Brazil Clinical Trials Market Report

- What was the Brazil clinical trials market value in 2024?
- What is the Brazil clinical trials market forecast outlook for 2025-2034?
- What are the major factors aiding the Brazil clinical trials 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 is the major Brazil clinical trials market trends?
- Which phase is expected to dominate the market segment?
- Which service type is projected to lead the market segment?
- Which therapeutic area is anticipated to drive the market segment?
- Which application is likely to dominate the market segment?
- Who are the key players involved in the Brazil clinical trials 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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