

Clinical Trials - Company Evaluation Report, 2025

Market Report | 2025-08-01 | 172 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$2650.00
- Corporate License \$4250.00

Report description:

The Clinical Trial Supplies Companies Quadrant is a comprehensive industry analysis that provides valuable insights into the global market for Clinical Trial Supplies. This quadrant offers a detailed evaluation of key market players, technological advancements, product innovations, and emerging trends shaping the industry. MarketsandMarkets 360 Quadrants evaluated over 120 companies, of which the Top 17 Clinical Trial Supplies Companies were categorized and recognized as the quadrant leaders.

The clinical trial supplies market is experiencing significant growth, driven by the increasing complexity of clinical trials, the rise in biologics and personalized medicine, and the globalization of clinical research. To manage costs, ensure regulatory compliance, and improve logistical efficiency, pharmaceutical and biotechnology companies are increasingly outsourcing supply chain operations to specialized service providers. Key innovations such as temperature-controlled packaging, direct-to-patient (DTP) delivery models, and the rise of decentralized clinical trials are accelerating demand for advanced supply chain solutions. The growing adoption of biologics, as well as cell and gene therapies, has further increased the need for robust cold chain logistics, real-time temperature monitoring, and cryogenic storage capabilities.

Digital transformation is also reshaping clinical trial supply management. AI-powered demand forecasting, blockchain-enabled transparency, and cloud-based inventory systems are enhancing operational efficiency and data integrity. As a result, pharmaceutical and biotech firms are partnering more frequently with Contract Research Organizations (CROs) and Contract Manufacturing Organizations (CMOs) to access integrated, end-to-end clinical trial supply solutions-further fueling market expansion.

The 360 Quadrant maps the Clinical Trial Supplies companies based on criteria such as revenue, geographic presence, growth strategies, investments, and sales strategies for the market presence of the Clinical Trial Supplies quadrant. The top criteria for product footprint evaluation included Service (logistics & distribution, storage & retention, packaging, labeling and blinding, manufacturing, comparator sourcing and other services) phase (Phase III, Phase II, Phase I, Phase IV, and Phase BA/BE) type (small molecules, biologics, and medical devices) therapeutic area (oncology, neurology, respiratory disorders, metabolic disorders/endocrinology, cardiovascular system disorders, dermatology, gastrointestinal system disorders, immunological disorders, infectious diseases, psychiatry, ophthalmology, hematology, genitourinary & women's health, and other therapeutic areas).

Key Players:

Some of the prominent players are Thermo Fisher Scientific Inc. (US), Novo Holdings A/S (Denmark), Marken (UPS) (US), Eurofins

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Scientific (Luxembourg), Piramal Group (India), Almac Group (UK), Novo Holdings A/S (Denmark), Marken (UPS) (US), PCI Pharma Services (US), and Sharp Services LLC (US), and others. These players are increasingly focusing on product launches and enhancements, investments, partnerships, collaborations, joint ventures, funding, acquisitions, expansions, agreements, sales contracts, and alliances to strengthen their presence in the global market.

Top 3 Companies

Thermo Fisher Scientific

Thermo Fisher Scientific is a global leader in science and technology, specializing in high-end analytical instruments, laboratory equipment, consumables, reagents, software, and services that support scientific research, discovery, diagnostics, and analysis. The company operates through four primary business segments: Life Sciences Solutions, Analytical Instruments, Specialty Diagnostics, and Laboratory Products & Biopharma Services. Thermo Fisher's presence in the clinical trial supplies market is anchored through its subsidiary PPD, which falls under the Laboratory Products & Biopharma Services segment. The company delivers a wide range of solutions through its prominent brands, including Thermo Scientific, Applied Biosystems, Invitrogen, Fisher Scientific, Unity Lab Services, Patheon, and PPD.

Sharp Services LLC

Sharp Services is a global provider of contract packaging and clinical trial supply solutions, serving the pharmaceutical, biotechnology, and life sciences industries. The company delivers end-to-end clinical trial services including GMP-compliant primary and secondary packaging, multi-language labeling, blinding services, cold chain logistics, Just-in-Time (JIT) labeling, and global storage and distribution. Sharp supports both clinical and commercial needs while ensuring regulatory compliance and operational flexibility. Headquartered in the United States, Sharp maintains GMP-certified facilities in the U.S. and the U.K., with operations extending across North America and Europe. Its key subsidiaries include Sharp Laboratories of America, Inc. (SLA), Sharp Hong Kong Limited (SHK), Sharp Manufacturing (Thailand) Co., Ltd. (SMTL), and Sharp Corporation of Australia Pty. Ltd. (SCA).

Parexel International

Parexel International is a leading contract research organization (CRO) that offers comprehensive drug development and regulatory services to pharmaceutical, biotech, and medical device companies. Its core business segment, Clinical Research Services (CRS), encompasses full-spectrum clinical trial management from Phase I to Phase IV, along with biostatistics, pharmacovigilance, data management, regulatory affairs, market access consulting, observational studies, and clinical logistics. Headquartered in the U.S., Parexel has a strong international footprint, with 85 offices across 52 countries. Notable subsidiaries include Parexel International S.A. (Argentina), Parexel Belgium SPRL, Parexel International, LLC (U.S.), Parexel International (Canada) Ltd., Parexel China Ding Hui Co., Ltd., Parexel International GmbH (Germany), Parexel International Limited (UK), and Parexel International Inc. (Japan).

Table of Contents:

1	INTRODUCTION	13
1.1	MARKET DEFINITION	13
1.2	STAKEHOLDERS	13
2	EXECUTIVE SUMMARY	14
3	MARKET OVERVIEW	19
3.1	INTRODUCTION	19
3.2	MARKET DYNAMICS	19
3.2.1	DRIVERS	20
3.2.1.1	Increasing focus on patient-centric trials (DCTs)	20
3.2.1.2	Increasing clinical trials for precision/personalized medicines supporting growth in clinical trial outsourcing	21
3.2.1.3	Rising R&D investments and patent cliff pressure driving growth in outsourcing clinical trial activities	22
3.2.1.4	Service flexibility offered by CROs for clinical development (FSP, FSO, Hybrid)	23
3.2.1.5	Technological integrations	24
3.2.2	OPPORTUNITIES	24

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

3.2.2.1	Increased focus on pediatric clinical trials	24
3.2.2.2	Increasing regulatory requirements for increasing diversity in clinical trials	25
3.2.2.3	Growing role of real-world evidence in drug approvals	26
3.2.2.4	Expanding drug modalities (such as CGT, Tissue Engineering, Bispecific Abs) in clinical trials	27
3.2.3	CHALLENGES	28
3.2.3.1	Cybersecurity or intellectual property concerns	28
3.2.3.2	Challenge of patient retention	29
3.2.3.3	Growing market competition	29
3.3	MARKET TRENDS	30
3.3.1	IN SILICO CLINICAL TRIALS	30
3.4	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	30
3.5	VALUE CHAIN ANALYSIS	31
3.6	ECOSYSTEM ANALYSIS	33
3.7	TECHNOLOGY ANALYSIS	35
3.7.1	KEY TECHNOLOGIES	35
3.7.1.1	Clinical trial management system (CTMS)	35
3.7.1.2	Electronic data capture (EDC) systems	36
3.7.1.3	Randomization and trial supply management (RTSM)	36
	?	
3.7.2	COMPLEMENTARY TECHNOLOGIES	37
3.7.2.1	Telemedicine and wearable devices	37
3.7.2.2	AI and ML integration	37
3.8	KEY CONFERENCES AND EVENTS, 2025-2026	38
3.9	PORTER'S FIVE FORCES ANALYSIS	39
3.9.1	THREAT OF NEW ENTRANTS	40
3.9.2	THREAT OF SUBSTITUTES	41
3.9.3	BARGAINING POWER OF SUPPLIERS	41
3.9.4	BARGAINING POWER OF BUYERS	41
3.9.5	INTENSITY OF COMPETITIVE RIVALRY	41
3.10	IMPACT OF AI/GEN AI ON CLINICAL TRIAL SERVICES MARKET	42
3.10.1	INTRODUCTION	42
3.10.2	MARKET POTENTIAL FOR CLINICAL TRIALS	42
3.10.3	AI USE CASES	43
3.10.4	KEY COMPANIES IMPLEMENTING AI	44
3.10.5	FUTURE OF GENERATIVE AI IN CLINICAL TRIAL ECOSYSTEM	44
4	COMPETITIVE LANDSCAPE	45
4.1	OVERVIEW	45
4.2	KEY PLAYER STRATEGIES/RIGHT TO WIN	45
4.3	REVENUE ANALYSIS	48
4.4	MARKET SHARE ANALYSIS, 2024	48
4.5	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	51
4.5.1	STARS	51
4.5.2	EMERGING LEADERS	51
4.5.3	PERVASIVE PLAYERS	51
4.5.4	PARTICIPANTS	51
4.5.5	COMPANY FOOTPRINT: KEY PLAYERS, 2024	52
4.5.5.1	Company footprint	52

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

4.5.5.2	Region footprint	54
4.5.5.3	Service type footprint	55
4.5.5.4	Phase footprint	56
4.6	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	57
4.6.1	PROGRESSIVE COMPANIES	57
4.6.2	RESPONSIVE COMPANIES	57
4.6.3	DYNAMIC COMPANIES	57
4.6.4	STARTING BLOCKS	58
4.6.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024	59
4.6.5.1	Detailed list of key startups/SMEs	59
4.6.5.2	Competitive benchmarking of startups/SMEs	60
4.7	COMPANY VALUATION AND FINANCIAL METRICS	61
4.8	BRAND/SERVICE COMPARISON	62
4.9	COMPETITIVE SCENARIO	63
4.9.1	SERVICE LAUNCHES	63
4.9.2	DEALS	64
4.9.3	EXPANSIONS	65
5	COMPANY PROFILES	66
5.1	KEY PLAYERS	66
5.1.1	IQVIA INC.	66
5.1.1.1	Business overview	66
5.1.1.2	Services offered	67
5.1.1.3	Recent developments	69
5.1.1.3.1	Service launches	69
5.1.1.3.2	Deals	69
5.1.1.3.3	Expansions	71
5.1.1.4	MnM view	72
5.1.1.4.1	Right to win	72
5.1.1.4.2	Strategic choices	72
5.1.1.4.3	Weaknesses and competitive threats	72
5.1.2	ICON PLC	73
5.1.2.1	Business overview	73
5.1.2.2	Services offered	74
5.1.2.3	Recent developments	80
5.1.2.3.1	Service launches	80
5.1.2.3.2	Deals	81
5.1.2.4	MnM view	82
5.1.2.4.1	Right to win	82
5.1.2.4.2	Strategic choices	82
5.1.2.4.3	Weaknesses and competitive threats	82
5.1.3	THERMO FISHER SCIENTIFIC INC.	83
5.1.3.1	Business overview	83
5.1.3.2	Services offered	84
5.1.3.3	Recent developments	89
5.1.3.3.1	Service launches	89
5.1.3.3.2	Deals	90
5.1.3.3.3	Expansions	92

5.1.3.4	MnM view	93
5.1.3.4.1	Right to win	93
5.1.3.4.2	Strategic choices	93
5.1.3.4.3	Weaknesses and competitive threats	93
5.1.4	FORTREA	94
5.1.4.1	Business overview	94
5.1.4.2	Services offered	95
5.1.4.3	Recent developments	99
5.1.4.3.1	Service launches	99
5.1.4.3.2	Deals	99
5.1.4.3.3	Expansions	100
5.1.4.4	MnM view	100
5.1.4.4.1	Right to win	100
5.1.4.4.2	Strategic choices	100
5.1.4.4.3	Weaknesses and competitive threats	100
5.1.5	SYNEOS HEALTH	101
5.1.5.1	Business overview	101
5.1.5.2	Services offered	102
5.1.5.3	Recent developments	103
5.1.5.3.1	Service launches	103
5.1.5.3.2	Deals	103
5.1.5.4	MnM view	106
5.1.5.4.1	Right to win	106
5.1.5.4.2	Strategic choices	106
5.1.5.4.3	Weaknesses and competitive threats	106
5.1.6	LABORATORY CORPORATION OF AMERICA HOLDINGS	107
5.1.6.1	Business overview	107
5.1.6.2	Services offered	109
5.1.6.3	Recent developments	109
5.1.6.3.1	Service launches	109
5.1.6.3.2	Deals	110
5.1.6.3.3	Expansions	111
5.1.6.4	MnM view	112
5.1.6.4.1	Right to win	112
5.1.6.4.2	Strategic choices	112
5.1.6.4.3	Weaknesses and competitive threats	112
5.1.7	MEDPACE	113
5.1.7.1	Business overview	113
5.1.7.2	Services offered	114
5.1.8	WUXI APPTEC	117
5.1.8.1	Business overview	117
5.1.8.2	Services offered	118
5.1.8.3	Recent developments	121
5.1.8.3.1	Deals	121
5.1.9	FRONTAGE LABS	122
5.1.9.1	Business overview	122
5.1.9.2	Services offered	123

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

5.1.9.3	Recent developments	124
5.1.9.3.1	Deals	124
5.1.9.3.2	Expansions	125
5.1.10	PHARMARON	126
5.1.10.1	Business overview	126
5.1.10.2	Services offered	128
5.1.11	TIGERMED	129
5.1.11.1	Business overview	129
5.1.11.2	Services offered	130
5.1.11.3	Recent developments	132
5.1.11.3.1	Service approvals	132
5.1.11.3.2	Deals	133
5.1.12	SGS SOCIETE GENERALE DE SURVEILLANCE SA	134
5.1.12.1	Business overview	134
5.1.12.2	Services offered	135
5.1.13	EUROFINS SCIENTIFIC	136
5.1.13.1	Business overview	136
5.1.13.2	Services offered	138
5.1.14	LINICAL	139
5.1.14.1	Business overview	139
5.1.14.2	Services offered	141
5.1.14.3	Recent developments	141
5.1.14.3.1	Deals	141
5.1.14.3.2	Expansions	142
5.1.15	PAREXEL INTERNATIONAL CORPORATION	143
5.1.15.1	Business overview	143
5.1.15.2	Services offered	144
5.1.15.3	Recent developments	145
5.1.15.3.1	Service launches	145
5.1.15.3.2	Deals	145
5.1.15.3.3	Expansions	147
5.2	OTHER PLAYERS	148
5.2.1	WORLDWIDE CLINICAL TRIALS	148
5.2.2	PROPHARMA	150
5.2.3	NOVOTECH	151
5.2.4	PSI	154
5.2.5	ALLUCENT	155
5.2.6	PREMIER RESEARCH	156
5.2.7	CAIDYA	157
5.2.8	ERGOMED GROUP	158
5.2.9	CLARIO	160
5.2.10	PRECISION MEDICINE GROUP, LLC.	161
5.2.11	ADVANCED CLINICAL	162
5.2.12	EPS HOLDINGS, INC.	163
5.2.13	GUIRES INC. (PEPGRA)	164
5.2.14	KCR S.A.	165
6	APPENDIX	166

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

6.1	RESEARCH METHODOLOGY	166
6.1.1	RESEARCH DATA	166
6.1.1.1	Secondary data	166
6.1.1.2	Primary data	167
6.1.2	RESEARCH ASSUMPTIONS	167
6.1.3	RESEARCH LIMITATIONS	168
6.2	COMPANY EVALUATION MATRIX: METHODOLOGY	169
6.3	AUTHOR DETAILS	172

Clinical Trials - Company Evaluation Report, 2025

Market Report | 2025-08-01 | 172 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	\$2650.00
	Corporate License	\$4250.00
		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"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-20"/>
		Signature	<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