

# **The US Clinical Research Market Outlook to 2017 - Led by Aging Population and Rise of Chronic Diseases**

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## **Abstracts**

### **Executive Summary:**

The report titled 'The US Clinical Research Market Outlook to 2017 – Led by Aging Population and Rise of Chronic Diseases' provides a comprehensive analysis of the various aspects such as market size, segmentation, trends and developments and future projections of the therapeutic areas of Oncology, Central Nervous System Disorders, Cardiovascular Diseases, Infectious Diseases and Metabolic disorders as key segments of the market. The report also provides a detailed explanation of the various macro and industry factors which are driving the growth of clinical research in the US.

The US is the most developed and active market across the globe in the area of clinical research. As of June '2013, ~ clinical studies have been registered in the country. The pace of development of drugs and devices has decelerated during the last few years. Pharma/biotech companies in order to accelerate development of drugs and its delivery are outsourcing the drug development process to CROs. The country's clinical research market in view of the increasing outsourcing to CROs earned revenue of USD ~ million in the year 2012 which has increased from USD ~ million in the year 2006. The market has inclined with a CAGR of 11.7% during the period of 2006-2012. The therapeutic area of Oncology is the largest contributing segment. The current size of clinical research for Oncology by revenue is USD ~ million which has escalated with a CAGR of 22.8% during the period of 2006-2012 with revenue of USD ~ million in 2006. Clinical research for Breast Cancer is the largest contributor to the US Oncology clinical research market with 11.7% contribution in the year 2012. The US Breast Cancer clinical research market is estimated to grow at a CAGR of 22.8% during the period of

2012-2017. The state of California contributes the maximum to a number of clinical studies registered in the country with ~ clinical studies as of June, 2013

The exposure of the people in the US to the central nervous system diseases is also rising due to elevating old aged population. Hence, there is a rising need to discover and develop more novel and effective therapeutic treatments focused on the central nervous system. The US Central Nervous System disease clinical research market witnessed a surge and has grown at a CAGR of 12.9% during the period of 2006-2012. The market is anticipated to generate revenue of USD ~ million in the year 2017 from ~ million in the year 2012.

Cardiovascular diseases are the leading cause of deaths in the country and account for approximately 17% of the country's health care expenditures. The increasing health expenditure and incidence of heart diseases are the factors which have fuelled the growth of clinical research in the therapeutic area of cardiovascular diseases. The income from clinical research for cardiovascular diseases inclined with a CAGR of 12.6% during the period of 2006-2012. The other cardiovascular diseases such as hypertension, Arrhythmia, Cardiomyopathy and others are expected to rise consistently in the future years. The income from the clinical research in other cardiovascular diseases is expected to incline with a CAGR of 17.5% for the period of 2012-2017 reaching USD ~ million in the year 2017.

The US infectious diseases clinical research market is segmented into two broad categories HIV/AIDS and Hepatitis (A, B and C). In the US HIV/AIDS is an epidemic concentrated in the urban areas. The research for HIV/AIDS contributed 18.8% in the year 2012 and the research for Hepatitis (A, B and C) had a share of 8.4% in 2006 which has inclined to 10.9% in the year 2012. Clinical research for Infectious diseases is expected to incline with a pace reaching USD ~ million in the year 2017 and is projected to grow with a CAGR of 12.3% during the period of 2012-2017.

The US clinical research market is dominated by 5 top players commanding a market share of ~% in the year 2012. Quintiles is the leading company holding a market share of ~% in 2012, followed by Covance with a market share of ~% registering net revenue of USD ~ million. PPD is the third largest player and holds a market share of ~%. INC research has ~% of the market share and is the fourth largest CRO in the country.

## **Key Topics Covered in the Report**

The market size of The US Clinical Research Market on the basis of revenue

earned by the contract research organizations in the country.

The market segmentation of The US Clinical Research Market on the basis of therapeutic areas of Oncology, Central Nervous System Disorders, Cardiovascular Diseases, Infectious Diseases and Metabolic Disorders.

The market segmentation of Oncology on the basis revenue generated in key medical conditions of Oncology which include Breast Cancer, Lung Cancer, Leukemia, Prostate Cancer, Non Small Cell Lung Cancer and other kinds of cancers.

The market size of Breast Cancer, Lung Cancer, Leukemia, Prostate Cancer, Non Small Cell Lung Cancer and other kinds of cancers on the basis of revenue generated from clinical research in these areas.

Future Outlook and Projections of Oncology and its key medical conditions.

The market size of Central Nervous System Disorders on the basis of revenue.

The market segmentation of Central Nervous System Disorders on the basis revenue generated in its key medical conditions which comprise of Strokes, Schizophrenia, Alzheimer, Multiple Sclerosis, Epilepsy and other Central Nervous System Disorders.

Future Outlook and Projections of Central Nervous System Disorders and its key medical conditions.

The market size of Cardiovascular Diseases on the basis of revenue.

The market segmentation of Cardiovascular Diseases on the basis revenue generated in its key medical conditions which comprise of Coronary Artery Disease and Heart Failures.

Future Outlook and Projections of Cardiovascular Diseases and its key medical conditions.

The market size of Infectious Diseases on the basis of revenue.

The market segmentation of Infectious Diseases on the basis revenue

generated in its key medical conditions which comprise of HIV/AIDS and Hepatitis (A, B and C)

Future Outlook and Projections of Infectious Diseases and its key medical conditions.

The market size of metabolic disorders on the basis of revenue.

The market segmentation of Metabolic Disorders on the basis revenue generated in its key medical conditions which comprise of Diabetes and other metabolic disorders.

Future Outlook and Projections of Metabolic Disorders and its key medical conditions.

The market size of other therapeutic areas.

Future Outlook and Projections of other therapeutic areas.

The Future Outlook and Projections of The US Clinical Research Market on the basis of revenue.

## Contents

### **1. THE US CLINICAL RESEARCH MARKET INTRODUCTION**

### **2. THE US CLINICAL RESEARCH MARKET VALUE CHAIN**

### **3. THE US CLINICAL RESEARCH MARKET SIZE BY REVENUE, 2006-2012**

### **4. THE US CLINICAL RESEARCH MARKET SEGMENTATION BY MAJOR THERAPEUTIC AREAS, 2006-2012**

### **5. THE US ONCOLOGY CLINICAL RESEARCH MARKET**

#### 5.1. The US Oncology Clinical Research Market Size by Revenue, 2006-2012

#### 5.2. The US Oncology Clinical Research Market Segmentation, 2006-2012

##### 5.2.1. The US Breast Cancer Clinical Research Market Size by Revenue, 2006-2012

##### 5.2.2. The US Breast Cancer Clinical Research Market Future Projections, 2013-2017

##### 5.2.3. The US Lung Cancer Clinical Research Market, 2006-2012

##### 5.2.4. The US Lung Cancer Clinical Research Market Future Projections, 2013-2017

##### 5.2.5. The US Leukemia Clinical Research Market, 2006-2012

##### 5.2.6. The US Leukemia Clinical Research Market Future Projections, 2013-2017

##### 5.2.7. The US Prostate Cancer Clinical Research Market, 2006-2012

##### 5.2.8. The US Prostate Cancer Clinical Research Market Future Projections, 2013-2017

##### 5.2.9. The US Non-Small Cell Lung Cancer Clinical Research Market Size by Revenue, 2006-2012

##### 5.2.10. The US Non-Small Cell Lung Cancer Market Future Projections, 2013-2017

##### 5.2.11. The US Other Kinds of Cancer Clinical Research Market Size By Revenue, 2006-2012

##### 5.2.12. The US Other Kinds of Cancer Clinical Research Market Future Projections, 2013-2017

#### 5.3. The US Oncology Clinical Research Market Future Outlook and Projections by Revenue, 2013-2017

### **6. THE US CENTRAL NERVOUS SYSTEM CLINICAL RESEARCH MARKET**

#### 6.1. The US Central Nervous System Clinical Research Market Size by Revenue, 2006-2012

#### 6.2. The US Central Nervous System Disorders Clinical Research Market

## Segmentation, 2006-2012

- 6.2.1. The US Strokes Clinical Research Market Size by Revenue, 2006-2012
- 6.2.2. The US Strokes Clinical Research Market Future Outlook and Projections by Revenue, 2013-2017
- 6.2.3. The US Schizophrenia Clinical Research Market Size by Revenue, 2006-2012
- 6.2.4. The US Schizophrenia Clinical Research Market Future Outlook and Projections by Revenue, 2013-2017
- 6.2.5. The US Alzheimer Clinical Research Market Size by Revenue, 2006-2012
- 6.2.6. The US Alzheimer Clinical Research Market Future Outlook and Projections, 2013-2017
- 6.2.7. The US Multiple Sclerosis Clinical Research Market Size by Revenue, 2006-2012
- 6.2.8. The US Multiple Sclerosis Clinical Research Market Future Outlook and Projections by Revenue, 2013-2017
- 6.2.9. The US Epilepsy Clinical Research Market Size by Revenue, 2006-2012
- 6.2.10. The US Epilepsy Clinical Research Market Future Outlook and Projections by Revenue, 2013-2017
- 6.2.11. The US Other Central Nervous System Disorders Clinical Research Market Size by Revenue, 2006-2012
- 6.2.12. The US Other Central Nervous System Disorders Clinical Research Market Future Outlook and Projections by Revenue, 2013-2017
- 6.3. The US Central Nervous System Clinical Research Market Future Outlook and Projections, 2006-2012

## **7. THE US CARDIOVASCULAR CLINICAL RESEARCH MARKET**

- 7.1. The US Cardiovascular Clinical Research Market Size by Revenue, 2006-2012
- 7.2. The US Cardiovascular Clinical Research Market Segmentation, 2006-2012
  - 7.2.1. The US Coronary Artery Disease Clinical Research Market Size, 2006-2012
  - 7.2.2. The US Coronary Artery Disease Clinical Research Market Future Outlook and Projections, 2013-2017
  - 7.2.3. The US Heart Failures Clinical Research Market Size by Revenue, 2006-2012
  - 7.2.4. The US Heart Failures Clinical Research Market Future Projections, 2013-2017
  - 7.2.5. The US Other Cardiovascular Diseases Clinical Research Market Size by Revenue, 2006-2012
  - 7.2.6. The US Other Cardiovascular Diseases Clinical Research Market Size Future Outlook and Projections, 2013-2017
- 7.3. The US Cardiovascular Clinical Research Market Future Outlook and Projections by Revenue, 2013-2017

## **8. THE US INFECTIOUS DISEASES CLINICAL RESEARCH MARKET**

8.1. The US Infectious Diseases Clinical Research Market Size by Revenue, 2006-2012

8.2. The US Infectious Diseases Clinical Research Market Segmentation, 2006-2012

8.2.1. The US HIV/AIDS Clinical Research Market Size by Revenue, 2006-2012

8.2.2. The US HIV/AIDS Clinical Research Market Future Outlook and Projections, 2013-2017

8.2.3. The US Hepatitis (A, B and C) Clinical Research Market Size by Revenue, 2006-2012

8.2.4. The US Hepatitis (A, B and C) Clinical Research Market Future Outlook and Projections by revenue, 2013-2017

8.2.5. The US Other Infectious Diseases Clinical Research Market Size, 2006-2012

8.2.6. The US Other Infectious Diseases Clinical Research Market Future Outlook and Projections, 2006-2012

8.3. The US Infectious Diseases Clinical Research Market Future Outlook and Projections By Revenue, 2013-2017

## **9. THE US METABOLIC DISORDERS CLINICAL RESEARCH MARKET**

9.1. The US Metabolic Disorders Clinical Research Market Size by Revenue, 2006-2012

9.2. The US Metabolic Disorders Clinical Research Market Segmentation, 2006-2012

9.2.1. The US Diabetes Clinical Research Market Size by Revenue, 2006-2012

9.2.2. The US Diabetes Clinical Research Market Future Outlook and Projections by Revenue, 2013-2017

9.2.3. The US Other Metabolic Disorders Clinical Research Market Size by Revenue, 2006-2012

9.2.4. The US Other Metabolic Disorders Clinical Research Market Future Outlook and Projections, 2013-2017

9.3. The US Metabolic Disorders Clinical Research Market Future Outlook and Projections, 2013-2017

## **10. THE US OTHER THERAPEUTIC AREA CLINICAL RESEARCH MARKET**

10.1. The US Other Therapeutic Area Clinical Research Market Size by Revenue, 2006-2012

10.2. The US Other Therapeutic Area Clinical Research Market Future Outlook and Projections, 2013—2017



## **11. FDA RULES GOVERNING THE US CLINICAL RESEARCH MARKET**

## **12. TRENDS AND DEVELOPMENTS IN THE US CLINICAL RESEARCH MARKET**

Reduced Government Spending on Clinical Research  
Off shoring Clinical trials to Emergent Markets  
Evolution of E-clinical trials  
Patent Expiry of Several Branded Drugs  
Privatization of CROs  
Strategic Alliances between Pharmaceutical Companies and CROs

## **13. OPPORTUNITIES, DRIVERS AND RESTRAINTS**

Opportunities  
Drivers  
Restraints

## **14. ROLE OF ACADEMIC INSTITUTES IN THE US IN CONDUCTING CLINICAL RESEARCH**

## **15. MARKET SHARE OF MAJOR PLAYERS IN THE US CLINICAL RESEARCH MARKET, 2012**

## **16. COMPANY PROFILES OF THE MAJOR PLAYERS**

### **16.1. Quintiles**

- Company Overview
- Business Strategies
- Financial Performance

### **16.2. Covance Inc.**

- Company Overview
- Business Strategies
- Financial Performance

### **16.3. PPD**

- Company Overview
- Business Strategies
- Financial Performance

### **16.4. INC Research**



- Company Overview
- Business Strategies

#### 16.5. Inventiv Health Care

- Company Overview
- Business Strategies
- Financial Performance

#### 16.6. Parexel

- Company Overview
- Business Strategies

#### 16.7. ICON

- Company Overview
- Business Strategies
- Financial Performance

#### 16.8. PRA

- Company Overview
- Business Strategies

### **17. THE US CLINICAL RESEARCH MARKET FUTURE OUTLOOK AND PROJECTIONS, 2013-2017**

17.1. Cause and Effect Relationship between Dependent and Independent Factors Prevailing In the Us Clinical Research Market

17.2. The US Clinical Research Market Future Projections, 2013-2017

### **18. MACRO ECONOMIC AND INDUSTRY FACTORS: HISTORICAL AND PROJECTIONS**

18.1. The US Pharmaceutical Companies Domestic R&D Expenditure, 2006-2017

18.2. The US GDP, 2006-2017

18.3. The US Aged population, 2006-2017

18.4. The US Health Expenditure, 2006-2017

18.5. NIH Funding to Clinical Research, 2006-2017

### **19. APPENDIX**

19.1. Market Definitions

19.2. Abbreviations

19.3. Research Methodology

- Data Collection Methods

- Approach
- Variables (Dependent and Independent)
- Multi Factor Based Sensitivity Model
- Final Conclusion

#### 19.4. Disclaimer

## List Of Figures

### LIST OF FIGURES

Figure 1: The US Clinical Research Market Value Chain

Figure 2: The US Clinical Research Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 3: The US Clinical Research Market Segmentation by Major Therapeutic Areas on the Basis of Revenue in Percentage (%), 2006-2012

Figure 4: The US Oncology Clinical Research Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 5: The US Oncology Clinical Research Market Segmentation by Major Therapeutic Areas on the Basis of Revenue in Percentage (%), 2006-2012

Figure 6: The US Breast Cancer Clinical Research Market Size on the basis of Revenues in USD Million, 2006-2012

Figure 7: The US Breast Cancer Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 8: The US Lung Cancer Clinical Research Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 9: The US Lung Cancer Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 10: The US Leukemia Clinical Research Market Size on the basis of Revenue in USD Million, 2006-2012

Figure 11: The US Leukemia Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 12: The US Prostate Cancer Clinical Research Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 13: The US Prostate Cancer Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 14: The US Non Small Cell Lung Cancer Clinical Research Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 15: The US Non-Small Cell Lung Cancer Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 16: The US Other Kinds of Cancer Clinical Research Market Size on the basis of Revenues in USD Million, 2006-2012

Figure 17: The US Other Kinds of Cancer Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 18: The US Oncology Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 19: The US Central Nervous System Clinical Research Market Size on The Basis of Revenues in USD Million, 2006-2012

Figure 20: The US Central Nervous System Clinical Research Market Segmentation by Major Therapeutic Areas on the Basis of Revenue in Percentage (%), 2006-2012

Figure 21: The US Strokes Clinical Research Market Size on The Basis of Revenues in USD Million, 2006-2012

Figure 22: The US Strokes Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 23: The US Schizophrenia Clinical Research Market Size on The Basis of Revenues in USD Million, 2006-2012

Figure 24: The US Schizophrenia Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 25: The US Alzheimer Clinical Research Market Size on the Basis of Revenue in USD Million, 2006-2012

Figure 26: The US Alzheimer Clinical Research Market Future Projections on the Basis of Revenue in USD Million, 2013-2017

Figure 27: The US Multiple Sclerosis Clinical Research Market Size on The Basis of Revenue in USD Million, 2006-2012

Figure 28: The US Multiple Sclerosis Clinical Research Market Future Projections on the Basis of Revenue in USD Million, 2013-2017

Figure 29: The US Epilepsy Clinical Research Market Size on the Basis of Revenue in USD Million, 2006-2012

Figure 30: The US Epilepsy Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 31: The US Other Central Nervous System Diseases Clinical Research Market Size on The Basis of Revenue in USD Million, 2006-2012

Figure 32: The US Other Central Nervous System Diseases Clinical Research Market Future Projections on the Basis of Revenue in USD Million, 2013-2017

Figure 33: The US Central Nervous System Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 34: The US Cardiovascular Clinical Research Market Size on The Basis of Revenue in USD Million, 2006-2012

Figure 35: The US Cardiovascular Clinical Research Market Segmentation by Major Therapeutic Areas on the Basis of Revenue in Percentage (%), 2006-2012

Figure 36: The US Coronary Artery Disease Clinical Research Market Size on The Basis of Revenue in USD Million, 2006-2012

Figure 37: The US Coronary Artery Disease Clinical Research Market Future Projections on the Basis of Revenue in USD Million, 2013-2017

Figure 38: The US Heart Failures Clinical Research Market Size on The Basis of

Revenue in USD Million, 2006-2012

Figure 39: The US Heart Failures Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 40: The US Other Cardiovascular Diseases Clinical Research Market Size on The Basis of Revenue in USD Million, 2006-2012

Figure 41: The US Other Cardiovascular Diseases Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 42: The US Cardiovascular Clinical Research Market Future Projections on the Basis of Revenue in USD Million, 2013-2017

Figure 43: The US Infectious Diseases Clinical Research Market Size on The Basis of Revenue in USD Million, 2006-2012

Figure 44: The US Infectious Diseases Clinical Research Market Segmentation by Major Therapeutic Areas on the Basis of Revenue in Percentage (%), 2006-2012

Figure 45: The US HIV/AIDS Clinical Research Market Size on the Basis of Revenues in USD Million, 2006-2012

Figure 46: The US HIV/AIDS Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 47: The US Hepatitis (A, B and C) Clinical Research Market Size on The Basis of Revenue in USD Million, 2006-2012

Figure 48: The US Hepatitis (A, B and C) Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 49: The US Other Infectious Diseases Clinical Research Market Size on The Basis of Revenues in USD Million, 2006-2012

Figure 50: The US Other Infectious Diseases Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 51: The US Infectious Diseases Clinical Research Market Future Projections on the Basis of Revenue in USD Million, 2013-2017

Figure 52: The US Metabolic Disorders Clinical Research Market Size on the Basis of Revenue in USD Million, 2006-2012

Figure 53: The US Metabolic Disorders Clinical Research Market Segmentation by Major Therapeutic Areas on the Basis of Revenue in Percentage (%), 2006-2012

Figure 54: The US Diabetes Clinical Research Market Size on The Basis of Revenue in USD Million, 2006-2012

Figure 55: The US Diabetes Clinical Research Market Future Projections on the Basis of Revenue in USD Million, 2013-2017

Figure 56: The US Other Metabolic Disorders Clinical Research Market Size on The Basis of Revenue in USD Million, 2006-2012

Figure 57: The US Metabolic Disorders Clinical Research Market Future Projections on the Basis of Revenue in USD Million, 2013-2017

Figure 58: The US Metabolic Disorders Clinical Research Market Future Projections on the Basis of Revenue in USD Million, 2013-2017

Figure 59: The US Other Therapeutic Area Clinical Research Market Size on The Basis of Revenues in USD Million, 2006-2012

Figure 60: The US Other Therapeutic Area Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 61: Market Share of Major Players in the US Clinical Research Market in Percentage, 2012

Figure 62: The US Revenue of Quintiles in USD Million, 2011-2012

Figure 63: The US Revenue of Covance Inc. in USD Million, 2006-2012

Figure 64: The US Revenue of PPD in USD Million, 2006-2010

Figure 65: Global Revenue of Inventiv Health in USD Million, 2006-2009

Figure 66: The US Revenue of ICON in USD Million, 2007-2012

Figure 67: The US Clinical Research Market Future Projections on the Basis of Revenues in USD Million, 2013-2017

Figure 68: The US Pharma Companies Domestic R&D Expenditure in USD Million, 2006-2017

Figure 69: The US GDP in USD Million, 2006-2017

Figure 70: The US Aged population in Million, 2006-2017

Figure 71: The US Health Expenditure in USD Million, 2006-2017

Figure 72: The US National Institutes of Health Funding to Clinical Research in USD Million, 2006-2017

## List Of Tables

### LIST OF TABLES

Table 1: The US Pharma Companies Spending Breakdown on Outsourcing across Various Phases of Clinical Research in percentage (%), 2008

Table 2: The US NIH Funding for Research and the Annual Cost of Care for Major Diseases in USD Billion, FY 2012

Table 3: The US Number of Clinical Studies Conducted in Units, 2006-2012

Table 4: The US Number of Clinical Studies Funded by NIH in Units, 2006-2012

Table 5: The US Number of Clinical Studies Funded by Industry in Units, 2006-2012

Table 6: The US Number of Clinical Studies Funded by Other Federal Agencies in Units, 2006-2012

Table 7: The US Number of Clinical Studies Funded by All Other Associations, Societies in Units, 2006-2012

Table 8: The US Number of Oncology Clinical Studies Conducted in Units, 2006-2012

Table 9: The US NCI Spending on Research and Related Activities for Various Kinds of Cancer in USD Million, 2008-2010

Table 10: The US Breast Cancer Clinical Studies Conducted in Units, 2006-2012

Table 11: The US Breast Cancer Incidence Rate per 100,000 Women, 2006-2009

Table 12: The US New Cases of Breast Cancer and the Number of Deaths per Day, 2012

Table 13: The US Lung Cancer Incidence Rate per 100,000 Persons, 2006-2009

Table 14: The US Lung Cancer Estimated New Cases in Men and Women, 2010 and 2012

Table 15: The US Lung Cancer Clinical Studies Conducted in Units, 2006-2012

Table 16: The US Prevalence of the Four Major Types of Leukemia as of January 01, 2009

Table 17: The US Estimated New Leukemia Cases, 2010 and 2012

Table 18: The US Leukemia Clinical Studies Conducted in Units, 2006-2012

Table 19: The US Prostate Cancer Incidence Rate per 100,000 Men, 2006-2009

Table 20: The US Prostate Cancer Estimated New Cases, 2010 and 2012

Table 21: The US Prostate Cancer Clinical Studies Conducted in Units, 2006-2012

Table 22: The US Non Small Cell Lung Cancer Clinical Studies Conducted in Units, 2006-2012

Table 23: The US Central Nervous System Clinical Studies Conducted in Units, 2006-2012

Table 24: The US Strokes Clinical Studies Conducted in Units, 2006-2012

Table 25: The US Schizophrenia Clinical Studies Conducted in Units, 2006-2012



Table 26: The US Alzheimer Clinical Studies Conducted in Units, 2006-2012
Table 27: The US Multiple Sclerosis Clinical Studies Conducted in Units, 2006-2012
Table 28: The US Epilepsy Clinical Studies Conducted in Units, 2006-2012
Table 29: The US Other Central Nervous System Disorders Clinical Studies, 2006-2012
Table 30: The US Cardiovascular Clinical Studies Conducted in Units, 2006-2012
Table 31: The US Estimated Prevalence, Incidence and Reoccurrence of CAD, 2011 & 2012
Table 32: The US Coronary Artery Disease Clinical Studies Conducted in Units, 2006-2012
Table 33: The US Estimated Prevalence and Incidence of Heart Failures, 2012
Table 34: The US Heart Failures Clinical Studies Conducted in Units, 2006-2012
Table 35: The US Infectious Diseases Clinical Studies Conducted in Units, 2006-2012
Table 36: The US HIV/AIDS Incidence and Prevalence, 2010-2012
Table 37: The US HIV/AIDS Clinical Studies Conducted in Units, 2006-2012
Table 38: The US Incidence of Hepatitis A, B and C in the Population, 2006-2010
Table 39: The US Hepatitis (A, B and C) Clinical Studies Conducted in Units, 2006-2012
Table 40: The US Metabolic Disorders Clinical Studies Conducted in Units, 2006-2012
Table 41: The US Diagnosed and Undiagnosed Diabetes Cases among People aged 20 years or older, 2010
Table 42: The US Diabetes Clinical Studies Conducted in Units, 2006-2012
Table 43: The US FDA Acts and Codes Governing the Drug Development Market
Table 44: The US Fiscal Budgets and Funding to NIH, FY 2006- FY 2012
Table 45: The US List of Major Drugs Losing Patent, 2013-2016
Table 46: The Major CROs in the US Which Went Private
Table 47: The US Strategic Alliances between Pharmaceutical Companies and CROs, 2012
Table 48: Major Academic Institutions Involved in the US Clinical Research Market
Table 49: Strategic Partnerships of Quintiles, 2010-2013
Table 50: Strategic Partnerships and Alliances by Covance, 2010-2013
Table 51: Strategic Alliances of PPD
Table 52: Strategic Partnerships of INC Research, 2011
Table 53: Strategic Partnerships of Inventiv Health Care, 2010-2013
Table 54: Strategic Partnerships and Alliances by ICON, 2010-2012
Table 55: Strategic Partnerships of PRA International, 2007-2013
Table 56: Cause and Effect Relationship Analysis between Industry Factors and Expected Prospects in the US Clinical Research Market
Table 57: Correlation Matrix for the US Schizophrenia Clinical Research Market
Table 58: Regression Coefficients Output

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