

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.

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