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Global Oncology Based In-vivo CRO Market Size study, by Indication (Blood Cancer, Solid Tumor, Others) and Regional Forecasts 2022-2032

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Abstracts

Global Oncology Based In-vivo CRO Market is valued approximately at USD 1.33 billion in 2023 and is anticipated to grow with a healthy growth rate of more than 8.58% over the forecast period 2024-2032. The oncology-based in-vivo contract research organization (CRO) market is positioned at the confluence of rapid scientific breakthroughs and the ever-increasing global cancer burden. In-vivo CROs play an indispensable role in enabling drug developers to evaluate the efficacy and safety of oncology therapies through preclinical animal models. These models offer critical insights into tumor biology, pharmacokinetics, and therapeutic responsiveness—key elements required to de-risk later-stage clinical development. The rising complexity of cancer therapeutics, including biologics, immunotherapies, and personalized medicines, is driving demand for highly specialized in-vivo CROs with deep oncology expertise.

One of the primary growth enablers for the oncology-based in-vivo CRO market is the surging investment in cancer drug development, propelled by both public and private entities. As pharmaceutical pipelines become increasingly oncology-heavy, biotech firms and large pharma companies are outsourcing in-vivo testing to CROs to expedite timelines, control costs, and focus internal resources on core innovations. Additionally, advances in humanized mouse models, patient-derived xenografts (PDXs), and gene-edited models have expanded the capabilities of in-vivo CROs, enhancing translational accuracy and improving the predictability of therapeutic outcomes in humans. However, this market does face certain constraints, including stringent regulatory requirements, ethical considerations in animal testing, and the rising costs of sophisticated in-vivo experimentation.

Another key dynamic reshaping the landscape is the growing adoption of AI-powered

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imaging, real-time monitoring technologies, and advanced analytics platforms that allow CROs to generate richer, more actionable datasets from animal studies. Furthermore, the growing pressure on drug developers to accelerate time-to-market has led to an increasing reliance on CROs that offer integrated, end-to-end preclinical oncology services. As a result, many CROs are expanding their service portfolios beyond traditional toxicology to include biomarker development, combination therapy evaluation, and immune-oncology platforms. These developments collectively indicate a shift toward value-added partnerships that transcend transactional outsourcing.

Meanwhile, consolidation within the CRO industry continues to pick up pace as larger firms acquire niche oncology-focused players to diversify their service offerings and strengthen therapeutic area expertise. Strategic collaborations between biotech startups and CROs are also fostering innovation and enabling quicker proof-of-concept validations for novel oncology drugs. Notably, the rising tide of personalized medicine has ushered in a new era of companion diagnostics and precision oncology—both of which rely heavily on accurate in-vivo models that replicate patient-specific tumor behavior. This has opened up new avenues for CROs that are agile and equipped with cutting-edge animal model platforms.

Regionally, North America dominated the global oncology-based in-vivo CRO market in 2023, underpinned by the presence of leading CROs, robust oncology research infrastructure, and heavy R&D investments. The U.S. in particular remains a hotbed for cancer innovation, benefiting from strong regulatory frameworks, academic-industry collaborations, and generous funding from institutes like the NIH and NCI. Europe follows suit, with countries like Germany, the UK, and France making notable contributions to oncology CRO development through structured research ecosystems. Asia Pacific is forecasted to register the fastest growth over the coming years, driven by the expansion of biotech sectors in China and India, increasing clinical trial activities, and a growing focus on cancer therapeutics outsourcing across the region.

Major market player included in this report are:

Charles River Laboratories

Labcorp Drug Development (Covance)

ICON plc

Eurofins Scientific

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Envigo

PPD Inc.

Taconic Biosciences

Crown Bioscience

Wuxi AppTec

Syngene International Ltd

Janvier Labs

Hera BioLabs

Pharmaron

Bioanalytical Systems, Inc.

Evotec SE

The detailed segments and sub-segment of the market are explained below:

By Indication

Blood Cancer

Solid Tumor

Others

By Region:

North America

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U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

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Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

Years considered for the study are as follows:

Historical year – 2022

Base year – 2023

Forecast period – 2024 to 2032

Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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CHAPTER 8. RESEARCH PROCESS

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