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U.S. Clinical Trial Equipment & Ancillary Solutions Market Size, Share & Trends Analysis Report By Type (Sourcing, Supply/Logistics, Service), By Phase (Phase I, II, III, IV), And Segment Forecasts, 2025 - 2033

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Abstracts

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Market Size & Trends

The U.S. clinical trial equipment & ancillary solutions market size was estimated at USD 1.05 billion in 2024 and is projected to reach USD 2.06 billion by 2033, growing at a CAGR of 7.83% from 2025 to 2033. The growth is due to the increasing complexity of clinical trial protocols, which has heightened the need for precision in equipment logistics, device calibration, and timely distribution of trial-related supplies. Sponsors are under growing pressure to meet tight regulatory and study timelines, which in turn has increased reliance on third-party providers specializing in ancillary supply chain management, kitting, equipment leasing, and reverse logistics.

The increasing decentralization of clinical trials in the U.S. is a major driver for the demand for equipment and ancillary solutions. Traditional centralized trials are being replaced or supplemented by hybrid and fully decentralized models, which require extensive logistical coordination and specialized equipment deployment at participants' homes or local sites. This shift has created a need for direct-to-patient (DTP) supply chains, mobile health kits, connected medical devices, and home-use diagnostics that must be compliant with FDA standards. For instance, the rise of remote ECG monitors, wearable biosensors, and digital spirometers has necessitated ancillary providers capable of managing device calibration, patient training, and data integration remotely.

The logistical complexity of supporting multiple remote sites and participants requires real-time tracking, automated resupply systems, and robust reverse logistics - all of which are fueling investments into ancillary solution providers offering end-to-end support tailored for decentralized trials.

The surge in precision medicine and complex therapeutic areas such as oncology, neurology, and gene therapy trials is also propelling the growth of the clinical trial equipment & ancillary solutions industry in the U.S. These trials often demand highly specific equipment like infusion pumps for cellular therapies, customized specimen collection kits, and temperature-controlled drug delivery devices. Ancillary providers are expected to handle specialized packaging, pre-conditioning of equipment, and maintenance protocols to preserve the integrity of temperature- and time-sensitive supplies. The increase in protocol complexity - including biomarker assessments, digital endpoints, and longitudinal sampling - has made the standardization and scalability of ancillary services critical. In response, vendors are integrating cloud-based inventory management, automated labeling, and compliance-tracking tools to streamline processes and meet the heightened demands of sponsors and CROs. This alignment with advanced therapeutic trials is expanding the market beyond basic logistics into high-value clinical trial support infrastructure.

U.S. Clinical Trial Equipment & Ancillary Solutions Market Report Segmentation

This report forecasts revenue growth at the country level and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the U.S. clinical trial equipment & ancillary solutions market report based on type, and phase:

- Type Outlook (Revenue, USD Million, 2021 - 2033)
- Sourcing
    - Procurement
    - Equipment
    - Ancillaries
    - Rental

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- Equipment
- Ancillaries

Supply/Logistics

- Transportation
- Packaging
- Others

Service

- Calibrations
- Equipment servicing
- Others

Others

Phase Outlook (Revenue, USD Million, 2021 - 2033)

Phase I

Phase II

Phase III

Phase IV

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Contents

CHAPTER 4. U.S. CLINICAL TRIAL EQUIPMENT & ANCILLARY SOLUTIONS MARKET: TYPE ESTIMATES & TREND ANALYSIS

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List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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