

Clinical Trial Services Market by Type (Laboratory, Monitoring, Recruitment, PV, Data Management), Phase (I, II, III), Therapy (Oncology, Neurology, Dermatology, CVD), Modality (Biologics, Devices), Delivery Model (FSP, Hybrid) - Global Forecast to 2030

<https://marketpublishers.com/r/C0499942CF4AEN.html>

Date: March 2025

Pages: 522

Price: US\$ 4,950.00 (Single User License)

ID: C0499942CF4AEN

Abstracts

The global clinical trial services market is projected to reach USD 101.86 billion in 2030 from USD 66.59 billion in 2025, growing at a CAGR of 8.9% during the forecast period. This market is expanding as pharmaceutical, biotechnology, and medical device companies are increasingly outsourcing their clinical research activities to Contract Research Organizations (CROs). Flexible service models, such as Functional Service Provider (FSP) and hybrid service delivery models, offered by CROs enable cost management while allowing companies to retain control over critical operations. There is a growing demand for patient-centric trials, leveraging decentralized models, wearable devices, and digital platforms to enhance patient participation and retention. Technological advancements, including artificial intelligence (AI) and real-world data (RWD), are optimizing trial efficiency, site selection, and patient recruitment. The rising demand for personalized and precision medicine is driving an increase in clinical studies focused on targeted therapies, requiring CROs to support complex trial designs. Regulatory bodies are emphasizing pediatric clinical trials, requiring CROs to develop specialized expertise. Additionally, FDA guidelines promoting diversity in clinical trials are creating opportunities for CROs to expand patient recruitment and ensure broader representation. The increasing pipeline of new drug modalities, including cell and gene therapies, biologics, and RNA-based treatments, is further driving the need for specialized clinical research services.

“The oncology therapy area segment held the largest share in the clinical trial services market, by therapy area, during the forecast period”

In 2024, the oncology therapy area held the largest market within the clinical trial services market by therapy area. Factors such as the large number of cancer cases worldwide and the need for new treatments are supporting the large share of this therapy area. Cancer research is complex, requiring trials for targeted therapies, immunotherapies, and combination treatments. Regulatory agencies prioritize cancer drug approvals, leading to more trials in this area. Advances in precision medicine and biomarker research have also increased oncology trials, requiring expertise in patient recruitment and trial management. Strong investments from pharmaceutical companies, government agencies, and patient organizations further drive cancer research, making oncology the leading segment in clinical trials.

“The pharmaceutical & biopharmaceutical companies end user segment held the largest market share in the clinical trials services market, by end user, during the forecast period”

Pharmaceutical and biopharmaceutical companies dominated the clinical trial services end-user/sponsor market during the forecast period. Conducting in-house trials demands substantial investments in infrastructure, personnel, and regulatory compliance, making outsourcing a more cost-effective and efficient alternative as trial complexity increases. Partnering with Contract Research Organizations (CROs) allows these companies to leverage expertise in trial design, patient recruitment, regulatory adherence, and data management, expediting drug development. Additionally, the expanding R&D pipeline and growing focus on precision medicine have led pharmaceutical companies to outsource clinical services and laboratory testing, minimizing operational burdens and optimizing resources.

“Asia Pacific: The fastest growing region in the clinical trial services market”

The Asia Pacific clinical trial services market is projected to register the highest growth rate during the forecast period. This high growth is attributed to its large patient pool, high incidence of chronic and infectious diseases, and growing focus on developing biologics, biosimilars, and advanced therapies. Global pharmaceutical companies are increasingly shifting manufacturing and clinical research to the region to benefit from cost advantages, regulatory improvements, and better patient retention in trials. Additionally, government support and increasing investments in clinical research have further driven the outsourcing of clinical trial activities to APAC, contributing to its strong market growth.

The primary interviews conducted for this report can be categorized as follows:

By Company Type: Tier 1 – 44%, Tier 2 – 32%, and Tier 3 – 24%

By Designation: (Managers) - 45%, (CXOs, Directors)- 30%, and(Executives) - 25%

By Region: North America -40%, Europe -25%, Asia-Pacific -20%, ROW -15%

List of Companies Profiled in the Report:

IQVIA Inc. (US)

Thermo Fisher Scientific Inc. (US)

Fortrea (US)

ICON Plc (Ireland)

Syneos Health (US)

Laboratory Corporation of America Holdings (US)

Medpace (US)

Wuxi AppTec (China)

Frontage Labs (US)

Pharmaron (US)

Tigermed (China)

SGS Société Générale De Surveillance SA. (Switzerland)

Eurofins Scientific (Luxembourg)

Linical (Japan)

Parexel International Corporation (US)

Worldwide Clinical Trials (US)

Novotech (Australia)

PSI (Switzerland)

Allucent (US)

Premier Research (US)

Clario (US)

KCR S.A. (US)

Rho, Inc. (US)

Advanced Clinical (US)

Research Coverage:

This report provides a detailed picture of the global clinical trial service market. It aims to estimate the size and future growth potential of the market across different segments such as the service type, therapy area, phase, delivery model, modality, end user/sponsor, and region. The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the clinical trial services market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, and services; key strategies; partnerships, agreements, new service launches, mergers and acquisitions, and recent developments associated with the clinical trial services market. Competitive analysis of upcoming startups in the clinical trial services market ecosystem is covered in this report.

Reasons to buy this report :

The report will help the market leaders/new entrants in this market with information on

Clinical Trial Services Market by Type (Laboratory, Monitoring, Recruitment, PV, Data Management), Phase (I, I...

the closest approximations of the revenue numbers for the overall clinical trial services market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Increasing focus on patient-centric trials (DCTs), increasing clinical trials for precision/personalized medicines supporting growth in clinical trial outsourcing, rising R&D investments and patent cliff pressure driving growth in outsourcing clinical trial activities, service flexibility offered by CROs for clinical development (FSP, FSO, Hybrid) and technological integrations), opportunities (Increased focus on pediatric clinical trials, regulatory requirement for increasing diversity in clinical trials, growing role of real-world evidence in drug approvals, expanding drug modalities (such as CGT, ADCs, Bispecific Abs) in clinical trials), and challenges (Cybersecurity or intellectual property concerns, and challenge of patient retention) influencing the growth of the clinical trial services market.

Service Development/Innovation: Detailed insights on upcoming technologies, and new service launches in the clinical trial services market

Market Development: Comprehensive information about lucrative markets – the report analyses the clinical trial services market across varied regions.

Market Diversification: Exhaustive information about new services, untapped geographies, recent developments, and investments in the clinical trial services market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players in the clinical trial services market

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