

Contract Research Organization (CROs) Services Market by Type (Early Phase, Clinical, Lab, Consulting, Data Management), Therapeutic Area (Cancer, Infectious Disease, Neurology, Dermatology, Immunology, Hematology, Vaccines, CGT) - Global Forecast to 2029

<https://marketpublishers.com/r/CF281530DF6EN.html>

Date: January 2024

Pages: 483

Price: US\$ 7,150.00 (Single User License)

ID: CF281530DF6EN

Abstracts

The contract research organization (CRO) services market is projected to reach USD 129.8 billion by 2029 from an estimated USD 82.0 billion in 2024, at a CAGR of 9.6% during the forecast period. The key factors driving the growth of the CRO services market include increasing initiatives for novel drug development. Moreover, growing demand for precision personalized medicines is an opportunity area for this market.

The CRO services market has been segmented based on type, therapeutic area, end user and region.

“By type, early development services segment accounted for the second largest share in the CRO services market”

Based on type, the CRO services market is categorized into Clinical Research Services, Early Phase Development Services, Laboratory Services, Consulting Services and Data Management Services. In 2023, the early development services accounted for the second-largest share of the market owing to major factors such as the growing incurred costs and associated stringent regulatory requirements of processes in the different stages (discovery, preclinical) of early phase development.

“By end user, the pharmaceutical and biopharmaceutical companies accounted for the

largest share in the CRO services market”

Based on end user, the CRO Services market is segmented into Pharmaceutical & Biopharmaceutical Companies, Medical Device Companies and Academic Institutes. In 2023, the Pharmaceutical & Biopharmaceutical Companies segment accounted for a largest share of the CRO services market. Large share of this market segment can be attributed large number of drug pipeline products of pharma and biotech companies and presence of large number of pharma and biotech companies venturing in the drug development arena.

“North America: the largest share of the CRO Services market”

North America accounted for the largest share of the CRO Services market in 2023. The large share of the North America region can be attributed to a major factor which is the presence of key pharma and biotech players involved in drug research and development. This has consequently led to an increase in the outsourcing of clinical research activities in the region. Besides, the region has a well established healthcare system which further supports the growth of this market through funding and investments.

“Asia Pacific: The fastest-growing region in the CRO Services market.”

The Asia Pacific CRO Services market is projected to grow at the highest CAGR during the forecast period. This is attributed to one of the major factors that is the large patient population that is available along with desired diversity for conduction of clinical trials. Additionally, the overall costs of operations are relatively low in the region which attracts organizations for conduction of trials in the region.

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

By Respondent: Supply Side- 70% and Demand Side 30%

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

By Country: North America- 35%, Europe- 30%, Asia Pacific- 25%, Latin America- 5%, and Middle East and Africa- 5%

Prominent Players

IQVIA Inc. (US)

Laboratory Corporation of America Holdings (LabCorp) (US)

Thermo Fisher Scientific Inc. (US)

Syneos Health (US)

WuXi AppTec (China)

Charles River Laboratories (US)

Parexel International Corporation (US)

Pharmaron (China)

ICON Plc (Ireland)

Medpace (US)

SGS SA (Switzerland)

Frontage Labs (US)

Eurofins Scientific (Luxembourg)

PSI CRO AG (Switzerland)

BioAgile (India)

Firma Clinical Research (US)

Acculab Life Sciences (US)

Novotech (Australia)

KCR S.A. (US)

Linical (Japan)

Advanced Clinical (US)

Allucent (US)

Clinical Trial Service (Netherlands)

Guires Inc. (Pepgra Healthcare Pvt. Ltd.) (UK)

Worldwide Clinical Trials (US)

CTI Clinical Trial And Consulting (US)

Research Coverage:

This report provides a detailed picture of the CRO Services market. It aims at estimating the size and future growth potential of the market across different segments, such as the type, therapeutic area, end user and region (North America, Europe, Asia Pacific, Latin America, Middle East and Africa). The report also includes an in-depth competitive analysis of the key market players, along with their company profiles, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants by providing them with the closest approximations of the revenue numbers for the CRO Services market and its segments. It will also help stakeholders better understand the competitive landscape and gain more insights to better position their business and make suitable go-to-market strategies. This report will enable stakeholders to understand the market's pulse and provide them with information on the key market drivers, opportunities, challenges and trends.

The report provide insights on the following pointers”

Analysis of key drivers (growth in number of products in pipeline), opportunities (personalized medicine focus), challenges (patient recruitment) and trends (real world data and real world evidence) influencing the growth of the CRO Services market.

Market Development: Comprehensive information about lucrative markets- the report analyses the CRO Services market across varied regions.

Market Diversification: Exhaustive information about new service, untapped geographies, recent developments, and investments in the CRO Services market.

Competitive Assessment: In-depth assessment of market shares, growth strategies and product offerings of leading players like IQVIA Inc. (US), Laboratory Corporation of America Holdings (US), Thermo Fisher Scientific Inc. (US), ICON Plc (Ireland), WuXi AppTec (China), Syneos Health (US), Charles River Laboratories (US), Fortrea, Inc. (US), Pharmaron (China), Eurofins Scientific (Luxembourg) and Medpace (US) among others in the CRO Services market.

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
- 1.3 INCLUSIONS & EXCLUSIONS
- 1.4 MARKET SCOPE
 - 1.4.1 MARKETS CONSIDERED
 - 1.4.2 REGIONS CONSIDERED
 - 1.4.3 YEARS CONSIDERED
 - 1.4.4 CURRENCY CONSIDERED
- 1.5 RESEARCH LIMITATIONS
- 1.6 STAKEHOLDERS
- 1.7 SUMMARY OF CHANGES
 - 1.7.1 RECESSION IMPACT: CRO SERVICES MARKET

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - FIGURE 1 RESEARCH DESIGN
 - 2.1.1 SECONDARY DATA
 - FIGURE 2 SECONDARY DATA SOURCES
 - 2.1.2 PRIMARY DATA
 - FIGURE 3 BREAKDOWN OF PRIMARIES: SUPPLY- AND DEMAND-SIDE PARTICIPANTS
- 2.2 MARKET SIZE ESTIMATION
 - FIGURE 4 MARKET SIZE ESTIMATION: SUPPLY-SIDE ANALYSIS, 2023
 - FIGURE 5 MARKET SIZE ESTIMATION: APPROACH 1 (REVENUE SHARE ANALYSIS), 2023
 - FIGURE 6 ILLUSTRATIVE EXAMPLE OF IQVIA INC.: REVENUE SHARE ANALYSIS, 2023
 - FIGURE 7 MARKET VALIDATION FROM PRIMARY EXPERTS
 - 2.2.1 MARKET SIZE ASSESSMENT AT SEGMENTAL LEVEL
 - FIGURE 8 MARKET SIZE ESTIMATION: TOP-DOWN APPROACH
- 2.3 MARKET GROWTH FORECAST
 - FIGURE 9 CAGR PROJECTIONS, 2024 2029
 - FIGURE 10 GROWTH ANALYSIS OF DRIVERS, OPPORTUNITIES, AND CHALLENGES IN CRO SERVICES MARKET

2.4 MARKET BREAKDOWN & DATA TRIANGULATION

FIGURE 11 DATA TRIANGULATION METHODOLOGY

2.5 STUDY ASSUMPTIONS

2.6 RISK ANALYSIS

2.7 IMPACT OF ECONOMIC RECESSION ON CRO SERVICES MARKET

TABLE 1 GLOBAL INFLATION RATE PROJECTION, 2021 2028 (% GROWTH)

TABLE 2 US HEALTH EXPENDITURE, 2019 2022 (USD MILLION)

TABLE 3 US HEALTH EXPENDITURE, 2023 2030 (USD MILLION)

3 EXECUTIVE SUMMARY

FIGURE 12 CRO SERVICES MARKET, BY TYPE, 2024 VS. 2029 (USD MILLION)

FIGURE 13 CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2024 VS. 2029 (USD MILLION)

FIGURE 14 CRO SERVICES MARKET, BY END USER, 2024 VS. 2029 (USD MILLION)

FIGURE 15 GEOGRAPHICAL SNAPSHOT OF CRO SERVICES MARKET

4 PREMIUM INSIGHTS

4.1 CRO SERVICES MARKET OVERVIEW

FIGURE 16 INCREASING INVESTMENTS IN PHARMACEUTICAL R&D TO DRIVE MARKET

4.2 NORTH AMERICA: CRO SERVICES MARKET, BY COUNTRY AND TYPE, 2023

FIGURE 17 US AND CLINICAL RESEARCH SERVICES TO DOMINATE NORTH AMERICAN CRO SERVICES MARKET IN 2023

4.3 CRO SERVICES MARKET, BY TYPE, 2024 VS. 2029 (USD MILLION)

FIGURE 18 CLINICAL RESEARCH SERVICES TO DOMINATE MARKET DURING STUDY PERIOD

4.4 CRO SERVICES MARKET, BY END USER, 2023

FIGURE 19 PHARMACEUTICAL & BIOPHARMACEUTICAL COMPANIES ACCOUNTED FOR LARGEST MARKET SHARE IN 2023

4.5 GEOGRAPHICAL GROWTH OPPORTUNITIES IN CRO SERVICES MARKET

FIGURE 20 ASIA PACIFIC TO REGISTER HIGHEST GROWTH RATE DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 21 DRIVERS, OPPORTUNITIES, AND CHALLENGES: CRO SERVICES MARKET

TABLE 4 IMPACT ANALYSIS: CRO SERVICES MARKET

5.2.1 DRIVERS

5.2.1.1 Rising pharmaceutical R&D expenditure and increasing drug pipeline

FIGURE 22 LARGE PHARMACEUTICAL R&D SPENDING (AS A PERCENTAGE OF SALES), 2013 2022

FIGURE 23 ACTIVE PHARMACEUTICAL PIPELINE, 2012 2023

5.2.1.2 Technological advancements in clinical trials and innovative trial designs

5.2.1.3 High cost of in-house drug development

5.2.2 OPPORTUNITIES

5.2.2.1 Favorable growth prospects for biologics and biosimilars market

FIGURE 24 BIOSIMILARS APPROVALS AND LAUNCHES, 2015 2022

5.2.2.2 Need for novel clinical trial designs for complex cell & gene therapies

FIGURE 25 ONGOING CLINICAL TRIALS BY PHASE AND THERAPEUTIC APPROACH (AS OF APRIL 2023)

FIGURE 26 GENE & CELL THERAPY DEVELOPERS, CLINICAL TRIALS, AND INVESTMENT, BY REGION, 2022

5.2.2.3 Emergence of hybrid models with CRO-CDMO partnerships

5.2.2.4 Growing focus on personalized/precision medicine

5.2.2.5 Development of next-generation biotherapeutic products

5.2.3 CHALLENGES

5.2.3.1 Lack of adequate patient recruitment and retention for clinical trials

5.2.3.2 Changing clinical trial complexities

5.3 MARKET TRENDS

5.3.1 INDUSTRY CONSOLIDATION

TABLE 5 LIST OF MERGERS AND ACQUISITIONS

5.3.2 DECENTRALIZED CLINICAL TRIALS

5.3.3 REAL-WORLD DATA AND REAL-WORLD EVIDENCE

5.3.4 INCREASING INVOLVEMENT OF ARTIFICIAL INTELLIGENCE

5.4 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS BUSINESSES

FIGURE 27 REVENUE SHIFT AND NEW POCKETS FOR CRO SERVICE PROVIDERS

5.5 PRICING ANALYSIS

TABLE 6 PRICING ILLUSTRATION FOR FIRST IN-HUMAN TRIAL IN HEALTHY VOLUNTEERS IN EUROPE

5.6 VALUE CHAIN ANALYSIS

FIGURE 28 VALUE CHAIN ANALYSIS: CLINICAL RESEARCH TO ADD MAXIMUM

VALUE

5.7 ECOSYSTEM ANALYSIS

TABLE 7 ROLE IN ECOSYSTEM: CRO SERVICES MARKET

5.8 TECHNOLOGY ANALYSIS

5.9 CASE STUDY ANALYSIS

5.9.1 PPD TO LEVERAGE ITS PRECLARUS TECHNOLOGY FOR GENERATING CLEANER DATA, FASTER CLINICAL TRIALS, AND LESSER SITE BURDEN

5.9.2 IQVIA TO OFFER AI-POWERED MODELING FOR BETTER PATIENT IDENTIFICATION

5.9.3 USE OF LAB DATA INSIGHTS TO IMPROVE POPULATION MANAGEMENT OF CHRONIC KIDNEY DISEASES

5.9.4 IQVIA TO LEVERAGE ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING FOR IMPROVED SERVICE OFFERINGS

5.10 KEY CONFERENCES & EVENTS

TABLE 8 DETAILED LIST OF KEY CONFERENCES & EVENTS, 2024

5.11 REGULATORY ANALYSIS

5.11.1 REGULATORY ANALYSIS

5.11.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 9 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 10 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 11 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 12 REST OF THE WORLD: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.11.3 REGULATORY SCENARIO FOR DRUG APPROVALS AND CGMP PROCEDURES

5.12 PORTER S FIVE FORCES ANALYSIS

TABLE 13 PORTER S FIVE FORCES ANALYSIS: CRO SERVICES MARKET

5.12.1 THREAT OF NEW ENTRANTS

5.12.2 THREAT OF SUBSTITUTES

5.12.3 BARGAINING POWER OF BUYERS

5.12.4 BARGAINING POWER OF SUPPLIERS

5.12.5 INTENSITY OF COMPETITIVE RIVALRY

5.13 KEY STAKEHOLDERS & BUYING CRITERIA

5.13.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 29 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS OF CRO

SERVICES IN PHARMACEUTICAL AND BIOPHARMACEUTICAL COMPANIES

5.13.2 BUYING CRITERIA

FIGURE 30 KEY BUYING CRITERIA FOR END USERS

6 CRO SERVICES MARKET, BY TYPE

6.1 INTRODUCTION

TABLE 14 CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

6.2 CLINICAL RESEARCH SERVICES

TABLE 15 NUMBER OF REGISTERED AND RECRUITING CLINICAL STUDIES, BY LOCATION (AS OF DECEMBER 21, 2023)

FIGURE 31 DRUGS IN PIPELINE, BY DEVELOPMENT PHASE, 2022 VS. 2023

TABLE 16 EXAMPLES OF CLINICAL RESEARCH SERVICES OFFERED BY MARKET PLAYERS

TABLE 17 CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 18 CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY REGION, 2022 2029 (USD MILLION)

TABLE 19 NORTH AMERICA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 20 EUROPE: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 21 ASIA PACIFIC: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 22 LATIN AMERICA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 23 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY REGION, 2022 2029 (USD MILLION)

6.2.1 CLINICAL TRIAL SERVICES MARKET, BY PHASE

6.2.2 PHASE III CLINICAL RESEARCH SERVICES

6.2.2.1 Increased use of clinical resources and advanced technologies to drive segment

TABLE 24 EXAMPLES OF DRUGS IN PHASE III OF CLINICAL TRIALS, 2023

TABLE 25 PHASE III CLINICAL RESEARCH SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 26 NORTH AMERICA: PHASE III CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 27 EUROPE: PHASE III CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 28 ASIA PACIFIC: PHASE III CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 29 LATIN AMERICA: PHASE III CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 30 MIDDLE EAST & AFRICA: PHASE III CLINICAL RESEARCH SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

6.2.3 PHASE II CLINICAL RESEARCH SERVICES

6.2.3.1 Rising number of pipeline products to propel market

TABLE 31 EXAMPLES OF DRUGS IN PHASE II OF CLINICAL TRIALS, 2023

TABLE 32 PHASE II CLINICAL RESEARCH SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 33 NORTH AMERICA: PHASE II CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 34 EUROPE: PHASE II CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 35 ASIA PACIFIC: PHASE II CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 36 LATIN AMERICA: PHASE II CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 37 MIDDLE EAST & AFRICA: PHASE II CLINICAL RESEARCH SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

6.2.4 PHASE I CLINICAL RESEARCH SERVICES

6.2.4.1 Growing R&D pipeline of pharmaceutical companies to support segment

TABLE 38 EXAMPLES OF DRUGS IN PHASE I OF CLINICAL TRIALS, 2023

TABLE 39 PHASE I CLINICAL RESEARCH SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 40 NORTH AMERICA: PHASE I CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 41 EUROPE: PHASE I CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 42 ASIA PACIFIC: PHASE I CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 43 LATIN AMERICA: PHASE I CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 44 MIDDLE EAST & AFRICA: PHASE I CLINICAL RESEARCH SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

6.2.5 PHASE IV CLINICAL RESEARCH SERVICES

6.2.5.1 Increasing number of CROs providing post-marketing surveillance to drive segment

TABLE 45 EXAMPLES OF DRUGS IN PHASE IV OF CLINICAL TRIALS, 2023

TABLE 46 PHASE IV CLINICAL RESEARCH SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 47 NORTH AMERICA: PHASE IV CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 48 EUROPE: PHASE IV CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 49 ASIA PACIFIC: PHASE IV CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 50 LATIN AMERICA: PHASE IV CLINICAL RESEARCH SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 51 MIDDLE EAST & AFRICA: PHASE IV CLINICAL RESEARCH SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

6.2.6 CLINICAL RESEARCH SERVICES MARKET, BY STUDY DESIGN

TABLE 52 CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY STUDY DESIGN, 2022 2029 (USD MILLION)

TABLE 53 CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY REGION, 2022 2029 (USD MILLION)

6.2.6.1 Interventional studies

6.2.6.1.1 Better monitoring and data collection with structured protocol to propel segment

TABLE 54 INTERVENTIONAL STUDIES MARKET, BY REGION, 2022 2029 (USD MILLION)

6.2.6.2 Real world evidence studies

6.2.6.2.1 Increasing focus on informed healthcare decision-making to boost segment

TABLE 55 REAL WORLD EVIDENCE STUDIES MARKET, BY REGION, 2022 2029 (USD MILLION)

6.3 EARLY-PHASE DEVELOPMENT SERVICES

TABLE 56 EXAMPLES OF EARLY-PHASE DEVELOPMENT SERVICES OFFERED BY MARKET PLAYERS

TABLE 57 CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 58 CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY REGION, 2022 2029 (USD MILLION)

TABLE 59 NORTH AMERICA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 60 EUROPE: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 61 ASIA PACIFIC: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 62 LATIN AMERICA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 63 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY REGION, 2022 2029 (USD MILLION)

6.3.1 CHEMISTRY, MANUFACTURING, AND CONTROL SERVICES

6.3.1.1 Growing need to meet regulatory norms in drug development to drive segment

TABLE 64 CHEMISTRY, MANUFACTURING, AND CONTROL SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 65 NORTH AMERICA: CHEMISTRY, MANUFACTURING, AND CONTROL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 66 EUROPE: CHEMISTRY, MANUFACTURING, AND CONTROL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 67 ASIA PACIFIC: CHEMISTRY, MANUFACTURING, AND CONTROL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 68 LATIN AMERICA: CHEMISTRY, MANUFACTURING, AND CONTROL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 69 MIDDLE EAST & AFRICA: CHEMISTRY, MANUFACTURING, AND CONTROL SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

6.3.2 PRECLINICAL SERVICES

TABLE 70 PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 71 PRECLINICAL SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 72 NORTH AMERICA: PRECLINICAL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 73 EUROPE: PRECLINICAL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 74 ASIA PACIFIC: PRECLINICAL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 75 LATIN AMERICA: PRECLINICAL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 76 MIDDLE EAST & AFRICA: PRECLINICAL SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

6.3.2.1 Pharmacokinetics/Pharmacodynamics

6.3.2.1.1 High significance of drug metabolism studies to drive segment

TABLE 77 PHARMACOKINETICS/PHARMACODYNAMICS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 78 NORTH AMERICA: PHARMACOKINETICS/PHARMACODYNAMICS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 79 EUROPE: PHARMACOKINETICS/PHARMACODYNAMICS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 80 ASIA PACIFIC: PHARMACOKINETICS/PHARMACODYNAMICS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 81 LATIN AMERICA: PHARMACOKINETICS/PHARMACODYNAMICS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 82 MIDDLE EAST & AFRICA: PHARMACOKINETICS/PHARMACODYNAMICS MARKET, BY REGION, 2022 2029 (USD MILLION)

6.3.2.2 Toxicology testing

6.3.2.2.1 Growing need to provide high-quality and safe drugs to drive segment

TABLE 83 TOXICOLOGY TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 84 NORTH AMERICA: TOXICOLOGY TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 85 EUROPE: TOXICOLOGY TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 86 ASIA PACIFIC: TOXICOLOGY TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 87 LATIN AMERICA: TOXICOLOGY TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 88 MIDDLE EAST & AFRICA: TOXICOLOGY TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

6.3.2.3 Other preclinical services

TABLE 89 OTHER PRECLINICAL SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 90 NORTH AMERICA: OTHER PRECLINICAL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 91 EUROPE: OTHER PRECLINICAL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 92 ASIA PACIFIC: OTHER PRECLINICAL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 93 LATIN AMERICA: OTHER PRECLINICAL SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 94 MIDDLE EAST & AFRICA: OTHER PRECLINICAL SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

6.3.3 DISCOVERY STUDIES

6.3.3.1 Increasing reliance on CRO services for target identification and validation to

propel segment

TABLE 95 DISCOVERY STUDIES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 96 NORTH AMERICA: DISCOVERY STUDIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 97 EUROPE: DISCOVERY STUDIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 98 ASIA PACIFIC: DISCOVERY STUDIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 99 LATIN AMERICA: DISCOVERY STUDIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 100 MIDDLE EAST & AFRICA: DISCOVERY STUDIES MARKET, BY REGION, 2022 2029 (USD MILLION)

6.4 LABORATORY SERVICES

TABLE 101 EXAMPLES OF LABORATORY SERVICES OFFERED BY MARKET PLAYERS

TABLE 102 CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 103 CRO SERVICES MARKET FOR LABORATORY SERVICES, BY REGION, 2022 2029 (USD MILLION)

TABLE 104 NORTH AMERICA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 105 EUROPE: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 106 ASIA PACIFIC: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 107 LATIN AMERICA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 108 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY REGION, 2022 2029 (USD MILLION)

6.4.1 ANALYTICAL TESTING

TABLE 109 ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 110 ANALYTICAL TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 111 NORTH AMERICA: ANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 112 EUROPE: ANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 113 ASIA PACIFIC: ANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 114 LATIN AMERICA: ANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 115 MIDDLE EAST & AFRICA: ANALYTICAL TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

6.4.1.1 Physical characterization

6.4.1.1.1 Growing need to reduce risk of product failures to drive segment

TABLE 116 PHYSICAL CHARACTERIZATION MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 117 NORTH AMERICA: PHYSICAL CHARACTERIZATION MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 118 EUROPE: PHYSICAL CHARACTERIZATION MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 119 ASIA PACIFIC: PHYSICAL CHARACTERIZATION MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 120 LATIN AMERICA: PHYSICAL CHARACTERIZATION MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 121 MIDDLE EAST & AFRICA: PHYSICAL CHARACTERIZATION MARKET, BY REGION, 2022 2029 (USD MILLION)

6.4.1.2 Raw material testing

6.4.1.2.1 Importance of quality and purity of raw materials to propel segment

TABLE 122 RAW MATERIAL TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 123 NORTH AMERICA: RAW MATERIAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 124 EUROPE: RAW MATERIAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 125 ASIA PACIFIC: RAW MATERIAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 126 LATIN AMERICA: RAW MATERIAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 127 MIDDLE EAST & AFRICA: RAW MATERIAL TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

6.4.1.3 Batch-release testing

6.4.1.3.1 Wide range of batch-release testing services offered by CROs to propel growth

TABLE 128 BATCH-RELEASE TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 129 NORTH AMERICA: BATCH-RELEASE TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 130 EUROPE: BATCH-RELEASE TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 131 ASIA PACIFIC: BATCH-RELEASE TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 132 LATIN AMERICA: BATCH-RELEASE TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 133 MIDDLE EAST & AFRICA: BATCH-RELEASE TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

6.4.1.4 Stability testing

6.4.1.4.1 Long-term quality, safety, and efficacy of pharmaceutical products to drive segment

TABLE 134 STABILITY TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 135 NORTH AMERICA: STABILITY TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 136 EUROPE: STABILITY TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 137 ASIA PACIFIC: STABILITY TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 138 LATIN AMERICA: STABILITY TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 139 MIDDLE EAST & AFRICA: STABILITY TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

6.4.1.5 Other analytical testing

TABLE 140 OTHER ANALYTICAL TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 141 NORTH AMERICA: OTHER ANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 142 EUROPE: OTHER ANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 143 ASIA PACIFIC: OTHER ANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 144 LATIN AMERICA: OTHER ANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 145 MIDDLE EAST & AFRICA: OTHER ANALYTICAL TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

6.4.2 BIOANALYTICAL TESTING

6.4.2.1 Rising significance of accurate PK/PD studies to drive segment

TABLE 146 BIOANALYTICAL TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 147 NORTH AMERICA: BIOANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 148 EUROPE: BIOANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 149 ASIA PACIFIC: BIOANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 150 LATIN AMERICA: BIOANALYTICAL TESTING MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 151 MIDDLE EAST & AFRICA: BIOANALYTICAL TESTING MARKET, BY REGION, 2022 2029 (USD MILLION)

6.5 CONSULTING SERVICES

6.5.1 GROWING ADOPTION OF CONSULTING SERVICES FOR FASTER REGULATORY APPROVALS TO SUPPORT MARKET

TABLE 152 EXAMPLES OF CONSULTING SERVICES OFFERED BY MARKET PLAYERS

TABLE 153 CRO SERVICES MARKET FOR CONSULTING SERVICES, BY REGION, 2022 2029 (USD MILLION)

TABLE 154 NORTH AMERICA: CRO SERVICES MARKET FOR CONSULTING SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 155 EUROPE: CRO SERVICES MARKET FOR CONSULTING SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 156 ASIA PACIFIC: CRO SERVICES MARKET FOR CONSULTING SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 157 LATIN AMERICA: CRO SERVICES MARKET FOR CONSULTING SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 158 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR CONSULTING SERVICES, BY REGION, 2022 2029 (USD MILLION)

6.6 DATA MANAGEMENT SERVICES

6.6.1 DATA MANAGEMENT SERVICES TO COMMAND HIGHEST GROWTH RATE DURING FORECAST PERIOD

TABLE 159 EXAMPLES OF DATA MANAGEMENT SERVICES OFFERED BY MARKET PLAYERS

TABLE 160 CRO SERVICES MARKET FOR DATA MANAGEMENT SERVICES, BY REGION, 2022 2029 (USD MILLION)

TABLE 161 NORTH AMERICA: CRO SERVICES MARKET FOR DATA MANAGEMENT SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 162 EUROPE: CRO SERVICES MARKET FOR DATA MANAGEMENT SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 163 ASIA PACIFIC: CRO SERVICES MARKET FOR DATA MANAGEMENT

SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 164 LATIN AMERICA: CRO SERVICES MARKET FOR DATA MANAGEMENT SERVICES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 165 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR DATA MANAGEMENT SERVICES, BY REGION, 2022 2029 (USD MILLION)

7 CRO SERVICES MARKET, BY THERAPEUTIC AREA

7.1 INTRODUCTION

TABLE 166 CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

7.2 ONCOLOGY

TABLE 167 NUMBER OF NEW CANCER CASES, BY TYPE, 2020 VS. 2040

FIGURE 32 NUMBER OF REGISTERED ONCOLOGY CLINICAL TRIALS, 2012 2023 (THOUSAND)

TABLE 168 LIST OF FDA DRUGS APPROVED FOR ONCOLOGY, 2023

TABLE 169 CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 170 CRO SERVICES MARKET FOR ONCOLOGY, BY REGION, 2022 2029 (USD MILLION)

TABLE 171 NORTH AMERICA: CRO SERVICES MARKET FOR ONCOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 172 EUROPE: CRO SERVICES MARKET FOR ONCOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 173 ASIA PACIFIC: CRO SERVICES MARKET FOR ONCOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 174 LATIN AMERICA: CRO SERVICES MARKET FOR ONCOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 175 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR ONCOLOGY, BY REGION, 2022 2029 (USD MILLION)

7.2.1 BREAST CANCER

7.2.1.1 Strong R&D pipeline for breast cancer drugs to drive segment

TABLE 176 BREAST CANCER MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 177 NORTH AMERICA: BREAST CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 178 EUROPE: BREAST CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 179 ASIA PACIFIC: BREAST CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 180 LATIN AMERICA: BREAST CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 181 MIDDLE EAST & AFRICA: BREAST CANCER MARKET, BY REGION, 2022 2029 (USD MILLION)

7.2.2 LUNG CANCER

7.2.2.1 Increasing focus on research for advanced treatment to drive segment

TABLE 182 LUNG CANCER MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 183 NORTH AMERICA: LUNG CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 184 EUROPE: LUNG CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 185 ASIA PACIFIC: LUNG CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 186 LATIN AMERICA: LUNG CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 187 MIDDLE EAST & AFRICA: LUNG CANCER MARKET, BY REGION, 2022 2029 (USD MILLION)

7.2.3 PROSTATE CANCER

7.2.3.1 Rising number of research initiatives to propel market

TABLE 188 PROSTATE CANCER MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 189 NORTH AMERICA: PROSTATE CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 190 EUROPE: PROSTATE CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 191 ASIA PACIFIC: PROSTATE CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 192 LATIN AMERICA: PROSTATE CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 193 MIDDLE EAST & AFRICA: PROSTRATE CANCER MARKET, BY REGION, 2022 2029 (USD MILLION)

7.2.4 COLORECTAL CANCER

7.2.4.1 Increasing drug research activities to support market

TABLE 194 COLORECTAL CANCER MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 195 NORTH AMERICA: COLORECTAL CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 196 EUROPE: COLORECTAL CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 197 ASIA PACIFIC: COLORECTAL CANCER MARKET, BY COUNTRY, 2022

2029 (USD MILLION)

TABLE 198 LATIN AMERICA: COLORECTAL CANCER MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 199 MIDDLE EAST & AFRICA: COLORECTAL CANCER MARKET, BY REGION, 2022 2029 (USD MILLION)

7.2.5 OTHER CANCERS

TABLE 200 NUMBER OF DRUGS IN R&D PIPELINE FOR OTHER CANCERS, 2022 AND 2023

TABLE 201 OTHER CANCERS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 202 NORTH AMERICA: OTHER CANCERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 203 EUROPE: OTHER CANCERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 204 ASIA PACIFIC: OTHER CANCERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 205 LATIN AMERICA: OTHER CANCERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 206 MIDDLE EAST & AFRICA: OTHER CANCERS MARKET, BY REGION, 2022 2029 (USD MILLION)

7.3 INFECTIOUS DISEASES

7.3.1 GROWING INCIDENCE OF CHRONIC INFECTIONS TO SUPPORT MARKET

TABLE 207 CRO SERVICES MARKET FOR INFECTIOUS DISEASES, BY REGION, 2022 2029 (USD MILLION)

TABLE 208 NORTH AMERICA: CRO SERVICES MARKET FOR INFECTIOUS DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 209 EUROPE: CRO SERVICES MARKET FOR INFECTIOUS DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 210 ASIA PACIFIC: CRO SERVICES MARKET FOR INFECTIOUS DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 211 LATIN AMERICA: CRO SERVICES MARKET FOR INFECTIOUS DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 212 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR INFECTIOUS DISEASES, BY REGION, 2022 2029 (USD MILLION)

7.4 CARDIOVASCULAR SYSTEM DISORDERS

7.4.1 INCREASING PREVALENCE OF CARDIOVASCULAR DISEASES TO DRIVE MARKET

TABLE 213 EXAMPLES OF PIPELINE DRUGS FOR CARDIOVASCULAR DISEASES (AS OF DECEMBER 2023)

TABLE 214 CRO SERVICES MARKET FOR CARDIOVASCULAR SYSTEM

DISORDERS, BY REGION, 2022 2029 (USD MILLION)

TABLE 215 NORTH AMERICA: CRO SERVICES MARKET FOR CARDIOVASCULAR SYSTEM DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 216 EUROPE: CRO SERVICES MARKET FOR CARDIOVASCULAR SYSTEM DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 217 ASIA PACIFIC: CRO SERVICES MARKET FOR CARDIOVASCULAR SYSTEM DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 218 LATIN AMERICA: CRO SERVICES MARKET FOR CARDIOVASCULAR SYSTEM DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 219 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR CARDIOVASCULAR SYSTEM DISORDERS, BY REGION, 2022 2029 (USD MILLION)

7.5 NEUROLOGY

7.5.1 INCREASING INVESTMENTS IN R&D TO DRIVE MARKET

TABLE 220 CRO SERVICES MARKET FOR NEUROLOGY, BY REGION, 2022 2029 (USD MILLION)

TABLE 221 NORTH AMERICA: CRO SERVICES MARKET FOR NEUROLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 222 EUROPE: CRO SERVICES MARKET FOR NEUROLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 223 ASIA PACIFIC: CRO SERVICES MARKET FOR NEUROLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 224 LATIN AMERICA: CRO SERVICES MARKET FOR NEUROLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 225 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR NEUROLOGY, BY REGION, 2022 2029 (USD MILLION)

7.6 METABOLIC DISORDERS/ENDOCRINOLOGY

7.6.1 INCREASING NUMBER OF DIABETES PATIENTS TO BOOST MARKET

FIGURE 33 ESTIMATED NUMBER OF INDIVIDUALS WITH DIABETES, 2000 2045 (MILLION)

TABLE 226 CRO SERVICES MARKET FOR METABOLIC DISORDERS/ENDOCRINOLOGY, BY REGION, 2022 2029 (USD MILLION)

TABLE 227 NORTH AMERICA: CRO SERVICES MARKET FOR METABOLIC DISORDERS/ENDOCRINOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 228 EUROPE: CRO SERVICES MARKET FOR METABOLIC DISORDERS/ENDOCRINOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 229 ASIA PACIFIC: CRO SERVICES MARKET FOR METABOLIC DISORDERS/ENDOCRINOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 230 LATIN AMERICA: CRO SERVICES MARKET FOR METABOLIC DISORDERS/ENDOCRINOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 231 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR METABOLIC DISORDERS/ENDOCRINOLOGY, BY REGION, 2022 2029 (USD MILLION)

7.7 IMMUNOLOGICAL DISORDERS

7.7.1 GROWING CLINICAL RESEARCH AND RISING NUMBER OF DRUGS IN R&D PIPELINE TO DRIVE MARKET

TABLE 232 EXAMPLES OF PIPELINE DRUGS FOR IMMUNOLOGICAL DISORDERS, 2023

TABLE 233 CRO SERVICES MARKET FOR IMMUNOLOGICAL DISORDERS, BY REGION, 2022 2029 (USD MILLION)

TABLE 234 NORTH AMERICA: CRO SERVICES MARKET FOR IMMUNOLOGICAL DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 235 EUROPE: CRO SERVICES MARKET FOR IMMUNOLOGICAL DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 236 ASIA PACIFIC: CRO SERVICES MARKET FOR IMMUNOLOGICAL DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 237 LATIN AMERICA: CRO SERVICES MARKET FOR IMMUNOLOGICAL DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 238 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR IMMUNOLOGICAL DISORDERS, BY REGION, 2022 2029 (USD MILLION)

7.8 VACCINES

7.8.1 GROWING PREVALENCE OF INFECTIOUS DISEASES AND RISING GOVERNMENT FUNDING TO SUPPORT MARKET

TABLE 239 CRO SERVICES MARKET FOR VACCINES, BY REGION, 2022 2029 (USD MILLION)

TABLE 240 NORTH AMERICA: CRO SERVICES MARKET FOR VACCINES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 241 EUROPE: CRO SERVICES MARKET FOR VACCINES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 242 ASIA PACIFIC: CRO SERVICES MARKET FOR VACCINES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 243 LATIN AMERICA: CRO SERVICES MARKET FOR VACCINES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 244 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR VACCINES, BY REGION, 2022 2029 (USD MILLION)

7.9 PSYCHIATRY

7.9.1 GROWING CASES OF PSYCHIATRIC DISORDERS AND INCREASING INVESTMENT IN R&D TO DRIVE MARKET

TABLE 245 CRO SERVICES MARKET FOR PSYCHIATRY, BY REGION, 2022 2029 (USD MILLION)

TABLE 246 NORTH AMERICA: CRO SERVICES MARKET FOR PSYCHIATRY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 247 EUROPE: CRO SERVICES MARKET FOR PSYCHIATRY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 248 ASIA PACIFIC: CRO SERVICES MARKET FOR PSYCHIATRY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 249 LATIN AMERICA: CRO SERVICES MARKET FOR PSYCHIATRY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 250 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR PSYCHIATRY, BY REGION, 2022 2029 (USD MILLION)

7.10 RESPIRATORY DISORDERS

7.10.1 RISING INCIDENCE OF UNDIAGNOSED RESPIRATORY DISORDERS AMONG CHILDREN TO PROPEL MARKET

TABLE 251 LIST OF PIPELINE DRUGS FOR RESPIRATORY DISEASES, 2023

TABLE 252 CRO SERVICES MARKET FOR RESPIRATORY DISORDERS, BY REGION, 2022 2029 (USD MILLION)

TABLE 253 NORTH AMERICA: CRO SERVICES MARKET FOR RESPIRATORY DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 254 EUROPE: CRO SERVICES MARKET FOR RESPIRATORY DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 255 ASIA PACIFIC: CRO SERVICES MARKET FOR RESPIRATORY DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 256 LATIN AMERICA: CRO SERVICES MARKET FOR RESPIRATORY DISORDERS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 257 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR RESPIRATORY DISORDERS, BY REGION, 2022 2029 (USD MILLION)

7.11 DERMATOLOGY

7.11.1 GROWING FOCUS ON DRUG DEVELOPMENT AGAINST VARIOUS SKIN CONDITIONS TO SUPPORT MARKET

TABLE 258 LIST OF PIPELINE DRUGS FOR SKIN DISEASES, 2023

TABLE 259 CRO SERVICES MARKET FOR DERMATOLOGY, BY REGION, 2022 2029 (USD MILLION)

TABLE 260 NORTH AMERICA: CRO SERVICES MARKET FOR DERMATOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 261 EUROPE: CRO SERVICES MARKET FOR DERMATOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 262 ASIA PACIFIC: CRO SERVICES MARKET FOR DERMATOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 263 LATIN AMERICA: CRO SERVICES MARKET FOR DERMATOLOGY, BY

COUNTRY, 2022 2029 (USD MILLION)

TABLE 264 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR DERMATOLOGY, BY REGION, 2022 2029 (USD MILLION)

7.12 OPHTHALMOLOGY

7.12.1 RISING NUMBER OF PIPELINE DRUGS AND GROWING FOCUS ON R&D TO DRIVE MARKET

TABLE 265 CRO SERVICES MARKET FOR OPHTHALMOLOGY, BY REGION, 2022 2029 (USD MILLION)

TABLE 266 NORTH AMERICA: CRO SERVICES MARKET FOR OPHTHALMOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 267 EUROPE: CRO SERVICES MARKET FOR OPHTHALMOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 268 ASIA PACIFIC: CRO SERVICES MARKET FOR OPHTHALMOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 269 LATIN AMERICA: CRO SERVICES MARKET FOR OPHTHALMOLOGY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 270 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR OPHTHALMOLOGY, BY REGION, 2022 2029 (USD MILLION)

7.13 GASTROINTESTINAL DISEASES

7.13.1 INCREASING LEVELS OF OBESITY WITH LIFESTYLE AND DIETARY CHANGES TO DRIVE MARKET

TABLE 271 CRO SERVICES MARKET FOR GASTROINTESTINAL DISEASES, BY REGION, 2022 2029 (USD MILLION)

TABLE 272 NORTH AMERICA: CRO SERVICES MARKET FOR GASTROINTESTINAL DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 273 EUROPE: CRO SERVICES MARKET FOR GASTROINTESTINAL DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 274 ASIA PACIFIC: CRO SERVICES MARKET FOR GASTROINTESTINAL DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 275 LATIN AMERICA: CRO SERVICES MARKET FOR GASTROINTESTINAL DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 276 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR GASTROINTESTINAL DISEASES, BY REGION, 2022 2029 (USD MILLION)

7.14 GENITOURINARY & WOMEN S HEALTH

7.14.1 RISING PREVALENCE OF CHRONIC DISORDERS AND INCREASING NUMBER OF PIPELINE DRUGS TO PROPEL MARKET

TABLE 277 CRO SERVICES MARKET FOR GENITOURINARY & WOMEN S HEALTH, BY REGION, 2022 2029 (USD MILLION)

TABLE 278 NORTH AMERICA: CRO SERVICES MARKET FOR GENITOURINARY &

WOMEN S HEALTH, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 279 EUROPE: CRO SERVICES MARKET FOR GENITOURINARY & WOMEN S HEALTH, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 280 ASIA PACIFIC: CRO SERVICES MARKET FOR GENITOURINARY & WOMEN S HEALTH, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 281 LATIN AMERICA: CRO SERVICES MARKET FOR GENITOURINARY & WOMEN S HEALTH, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 282 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR GENITOURINARY & WOMEN S HEALTH, BY REGION, 2022-2029 (USD MILLION)

7.15 HEMATOLOGY

7.15.1 GROWING PREVALENCE OF BLOOD-RELATED DISEASES TO SUPPORT MARKET

TABLE 283 CRO SERVICES MARKET FOR HEMATOLOGY, BY REGION, 2022-2029 (USD MILLION)

TABLE 284 NORTH AMERICA: CRO SERVICES MARKET FOR HEMATOLOGY, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 285 EUROPE: CRO SERVICES MARKET FOR HEMATOLOGY, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 286 ASIA PACIFIC: CRO SERVICES MARKET FOR HEMATOLOGY, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 287 LATIN AMERICA: CRO SERVICES MARKET FOR HEMATOLOGY, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 288 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR HEMATOLOGY, BY REGION, 2022-2029 (USD MILLION)

7.16 OTHER THERAPEUTIC AREAS

TABLE 289 CRO SERVICES MARKET FOR OTHER THERAPEUTIC AREAS, BY REGION, 2022-2029 (USD MILLION)

TABLE 290 NORTH AMERICA: CRO SERVICES MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 291 EUROPE: CRO SERVICES MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 292 ASIA PACIFIC: CRO SERVICES MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 293 LATIN AMERICA: CRO SERVICES MARKET FOR OTHER THERAPEUTIC AREAS, BY COUNTRY, 2022-2029 (USD MILLION)

TABLE 294 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR OTHER THERAPEUTIC AREAS, BY REGION, 2022-2029 (USD MILLION)

7.17 CUSTOMIZATION

7.17.1 CELL & GENE THERAPY

7.17.1.1 Growing investments for advanced research initiatives to support market
TABLE 295 CRO SERVICES MARKET FOR CELL & GENE THERAPY, BY REGION, 2022 2029 (USD MILLION)

TABLE 296 NORTH AMERICA: CRO SERVICES MARKET FOR CELL & GENE THERAPY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 297 EUROPE: CRO SERVICES MARKET FOR CELL & GENE THERAPY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 298 ASIA PACIFIC: CRO SERVICES MARKET FOR CELL & GENE THERAPY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 299 LATIN AMERICA: CRO SERVICES MARKET FOR CELL & GENE THERAPY, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 300 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR CELL & GENE THERAPY, BY REGION, 2022 2029 (USD MILLION)

7.17.2 RARE DISEASES

7.17.2.1 Rising number of R&D activities for rare disease treatment to drive market
TABLE 301 CRO SERVICES MARKET FOR RARE DISEASES, BY REGION, 2022 2029 (USD MILLION)

TABLE 302 NORTH AMERICA: CRO SERVICES MARKET FOR RARE DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 303 EUROPE: CRO SERVICES MARKET FOR RARE DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 304 ASIA PACIFIC: CRO SERVICES MARKET FOR RARE DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 305 LATIN AMERICA: CRO SERVICES MARKET FOR RARE DISEASES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 306 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR RARE DISEASES, BY REGION, 2022 2029 (USD MILLION)

7.17.3 BIOSIMILARS

7.17.3.1 Growing focus on biosimilars and patent expiration of biologics to drive market

TABLE 307 CRO SERVICES MARKET FOR BIOSIMILARS, BY REGION, 2022 2029 (USD MILLION)

TABLE 308 NORTH AMERICA: CRO SERVICES MARKET FOR BIOSIMILARS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 309 EUROPE: CRO SERVICES MARKET FOR BIOSIMILARS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 310 ASIA PACIFIC: CRO SERVICES MARKET FOR BIOSIMILARS, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 311 LATIN AMERICA: CRO SERVICES MARKET FOR BIOSIMILARS, BY

COUNTRY, 2022 2029 (USD MILLION)

TABLE 312 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR BIOSIMILARS, BY REGION, 2022 2029 (USD MILLION)

TABLE 313 CRO SERVICES MARKET FOR BIOSIMILARS, BY TYPE, 2022 2029 (USD MILLION)

7.17.3.2 Monoclonal antibodies

TABLE 314 MONOCLONAL ANTIBODIES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 315 NORTH AMERICA: MONOCLONAL ANTIBODIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 316 EUROPE: MONOCLONAL ANTIBODIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 317 ASIA PACIFIC: MONOCLONAL ANTIBODIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 318 LATIN AMERICA: MONOCLONAL ANTIBODIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 319 MIDDLE EAST & AFRICA: MONOCLONAL ANTIBODIES MARKET, BY REGION, 2022 2029 (USD MILLION)

7.17.3.3 Insulin

TABLE 320 INSULIN MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 321 NORTH AMERICA: INSULIN MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 322 EUROPE: INSULIN MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 323 ASIA PACIFIC: INSULIN MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 324 LATIN AMERICA: INSULIN MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 325 MIDDLE EAST & AFRICA: INSULIN MARKET, BY REGION, 2022 2029 (USD MILLION)

7.17.3.4 CSF

TABLE 326 CSF MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 327 NORTH AMERICA: CSF MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 328 EUROPE: CSF MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 329 ASIA PACIFIC: CSF MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 330 LATIN AMERICA: CSF MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 331 MIDDLE EAST & AFRICA: CSF MARKET, BY REGION, 2022 2029 (USD MILLION)

7.17.3.5 Erythropoietin

TABLE 332 ERYTHROPOIETIN MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 333 NORTH AMERICA: ERYTHROPOIETIN MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 334 EUROPE: ERYTHROPOIETIN MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 335 ASIA PACIFIC: ERYTHROPOIETIN MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 336 LATIN AMERICA: ERYTHROPOIETIN MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 337 MIDDLE EAST & AFRICA: ERYTHROPOIETIN MARKET, BY REGION, 2022 2029 (USD MILLION)

7.17.3.6 Other biosimilars

TABLE 338 OTHER BIOSIMILARS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 339 NORTH AMERICA: OTHER BIOSIMILARS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 340 EUROPE: OTHER BIOSIMILARS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 341 ASIA PACIFIC: OTHER BIOSIMILARS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 342 LATIN AMERICA: OTHER BIOSIMILARS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 343 MIDDLE EAST & AFRICA: OTHER BIOSIMILARS MARKET, BY REGION, 2022 2029 (USD MILLION)

8 CRO SERVICES MARKET, BY END USER

8.1 INTRODUCTION

TABLE 344 CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

8.2 PHARMACEUTICAL AND BIOPHARMACEUTICAL COMPANIES

8.2.1 STABLE R&D PIPELINES AND INCREASED INVESTMENTS TO DRIVE MARKET

FIGURE 34 ANNUAL DRUG APPROVALS, BY CDER (FDA), 2012 2023

FIGURE 35 R&D SPENDING OF PHARMACEUTICAL MEMBER COMPANIES, 2012 2022

TABLE 345 CRO SERVICES MARKET FOR PHARMACEUTICAL AND BIOPHARMACEUTICAL COMPANIES, BY REGION, 2022 2029 (USD MILLION)

TABLE 346 NORTH AMERICA: CRO SERVICES MARKET FOR PHARMACEUTICAL AND BIOPHARMACEUTICAL COMPANIES, BY COUNTRY, 2022 2029 (USD

MILLION)

TABLE 347 EUROPE: CRO SERVICES MARKET FOR PHARMACEUTICAL AND BIOPHARMACEUTICAL COMPANIES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 348 ASIA PACIFIC: CRO SERVICES MARKET FOR PHARMACEUTICAL AND BIOPHARMACEUTICAL COMPANIES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 349 LATIN AMERICA: CRO SERVICES MARKET FOR PHARMACEUTICAL AND BIOPHARMACEUTICAL COMPANIES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 350 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR PHARMACEUTICAL AND BIOPHARMACEUTICAL COMPANIES, BY REGION, 2022 2029 (USD MILLION)

8.3 MEDICAL DEVICE COMPANIES

8.3.1 INCREASING NUMBER OF GROWTH INITIATIVES BY MEDTECH ORGANIZATIONS TO DRIVE MARKET

FIGURE 36 US FDA DE NOVO MEDICAL DEVICE APPROVALS (2012 2023)

TABLE 351 CRO SERVICES MARKET FOR MEDICAL DEVICE COMPANIES, BY REGION, 2022 2029 (USD MILLION)

TABLE 352 NORTH AMERICA: CRO SERVICES MARKET FOR MEDICAL DEVICE COMPANIES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 353 EUROPE: CRO SERVICES MARKET FOR MEDICAL DEVICE COMPANIES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 354 ASIA PACIFIC: CRO SERVICES MARKET FOR MEDICAL DEVICE COMPANIES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 355 LATIN AMERICA: CRO SERVICES MARKET FOR MEDICAL DEVICE COMPANIES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 356 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR MEDICAL DEVICE COMPANIES, BY REGION, 2022 2029 (USD MILLION)

8.4 ACADEMIC INSTITUTES

8.4.1 RISING NUMBER OF COLLABORATIONS BETWEEN CONTRACT RESEARCH ORGANIZATIONS AND ACADEMIA TO DRIVE MARKET

TABLE 357 CRO SERVICES MARKET FOR ACADEMIC INSTITUTES, BY REGION, 2022 2029 (USD MILLION)

TABLE 358 NORTH AMERICA: CRO SERVICES MARKET FOR ACADEMIC INSTITUTES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 359 EUROPE: CRO SERVICES MARKET FOR ACADEMIC INSTITUTES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 360 ASIA PACIFIC: CRO SERVICES MARKET FOR ACADEMIC INSTITUTES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 361 LATIN AMERICA: CRO SERVICES MARKET FOR ACADEMIC

INSTITUTES, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 362 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR ACADEMIC
INSTITUTES, BY REGION, 2022 2029 (USD MILLION)

9 CRO SERVICES MARKET, BY REGION

9.1 INTRODUCTION

TABLE 363 CRO SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

9.2 NORTH AMERICA

FIGURE 37 NORTH AMERICA: CRO SERVICES MARKET SNAPSHOT

TABLE 364 NORTH AMERICA: CRO SERVICES MARKET, BY COUNTRY, 2022 2029
(USD MILLION)

TABLE 365 NORTH AMERICA: CRO SERVICES MARKET, BY TYPE, 2022 2029
(USD MILLION)

TABLE 366 NORTH AMERICA: CRO SERVICES MARKET FOR CLINICAL
RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 367 NORTH AMERICA: CRO SERVICES MARKET FOR EARLY-PHASE
DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 368 NORTH AMERICA: PRECLINICAL SERVICES MARKET, BY TYPE, 2022
2029 (USD MILLION)

TABLE 369 NORTH AMERICA: CRO SERVICES MARKET FOR LABORATORY
SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 370 NORTH AMERICA: ANALYTICAL TESTING MARKET, BY TYPE, 2022
2029 (USD MILLION)

TABLE 371 NORTH AMERICA: CRO SERVICES MARKET, BY THERAPEUTIC AREA,
2022 2029 (USD MILLION)

TABLE 372 NORTH AMERICA: CRO SERVICES MARKET FOR ONCOLOGY, BY
TYPE, 2022 2029 (USD MILLION)

TABLE 373 NORTH AMERICA: CRO SERVICES MARKET, BY END USER, 2022 2029
(USD MILLION)

9.2.1 NORTH AMERICA: RECESSION IMPACT

9.2.2 US

9.2.2.1 US to dominate North American CRO services market during forecast period

FIGURE 38 DISTRIBUTION OF R&D COMPANIES, BY COUNTRY/REGION
(JANUARY 2022 VS. JANUARY 2023)

TABLE 374 US: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 375 US: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES,
BY PHASE, 2022 2029 (USD MILLION)

TABLE 376 US: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT

SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 377 US: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 378 US: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 379 US: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 380 US: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 381 US: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 382 US: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.2.3 CANADA

9.2.3.1 Short approval time and favorable government R&D investments to drive market

TABLE 383 CANADA: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 384 CANADA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 385 CANADA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 386 CANADA: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 387 CANADA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 388 CANADA: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 389 CANADA: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 390 CANADA: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 391 CANADA: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.3 EUROPE

TABLE 392 EUROPE: CRO SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 393 EUROPE: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 394 EUROPE: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 395 EUROPE: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 396 EUROPE: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 397 EUROPE: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 398 EUROPE: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 399 EUROPE: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 400 EUROPE: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 401 EUROPE: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.3.1 EUROPE: RECESSION IMPACT

9.3.2 GERMANY

9.3.2.1 Growing R&D spending and favorable government policies to propel market

TABLE 402 GERMANY: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 403 GERMANY: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 404 GERMANY: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 405 GERMANY: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 406 GERMANY: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 407 GERMANY: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 408 GERMANY: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 409 GERMANY: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 410 GERMANY: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.3.3 UK

9.3.3.1 Growth in R&D expenditure in pharmaceutical industry to boost market

TABLE 411 UK: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 412 UK: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 413 UK: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 414 UK: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 415 UK: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 416 UK: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 417 UK: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 418 UK: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 419 UK: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.3.4 FRANCE

9.3.4.1 Government support for effective drug research to drive market growth

TABLE 420 FRANCE: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 421 FRANCE: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 422 FRANCE: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 423 FRANCE: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 424 FRANCE: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 425 FRANCE: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 426 FRANCE: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 427 FRANCE: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 428 FRANCE: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.3.5 ITALY

9.3.5.1 Increased availability of funding for drug discovery and development to drive

market

TABLE 429 ITALY: NUMBER OF CLINICAL TRIALS IN ITALY, BY COMPANY
(JANUARY 2022 VS. JANUARY 2023)

TABLE 430 ITALY: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 431 ITALY: CRO SERVICES MARKET FOR CLINICAL RESEARCH
SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 432 ITALY: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT
SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 433 ITALY: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD
MILLION)

TABLE 434 ITALY: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY
TYPE, 2022 2029 (USD MILLION)

TABLE 435 ITALY: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD
MILLION)

TABLE 436 ITALY: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029
(USD MILLION)

TABLE 437 ITALY: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022
2029 (USD MILLION)

TABLE 438 ITALY: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD
MILLION)

9.3.6 SPAIN

9.3.6.1 Growing R&D expenditure to boost market

TABLE 439 SPAIN: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 440 SPAIN: CRO SERVICES MARKET FOR CLINICAL RESEARCH
SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 441 SPAIN: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT
SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 442 SPAIN: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD
MILLION)

TABLE 443 SPAIN: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY
TYPE, 2022 2029 (USD MILLION)

TABLE 444 SPAIN: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD
MILLION)

TABLE 445 SPAIN: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029
(USD MILLION)

TABLE 446 SPAIN: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022
2029 (USD MILLION)

TABLE 447 SPAIN: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD
MILLION)

9.3.7 REST OF EUROPE

TABLE 448 REST OF EUROPE: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 449 REST OF EUROPE: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 450 REST OF EUROPE: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 451 REST OF EUROPE: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 452 REST OF EUROPE: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 453 REST OF EUROPE: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 454 REST OF EUROPE: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 455 REST OF EUROPE: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 456 REST OF EUROPE: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.4 ASIA PACIFIC

FIGURE 39 ASIA PACIFIC: CRO SERVICES MARKET SNAPSHOT

TABLE 457 ASIA PACIFIC: CRO SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 458 ASIA PACIFIC: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 459 ASIA PACIFIC: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 460 ASIA PACIFIC: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 461 ASIA PACIFIC: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 462 ASIA PACIFIC: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 463 ASIA PACIFIC: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 464 ASIA PACIFIC: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 465 ASIA PACIFIC: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 466 ASIA PACIFIC: CRO SERVICES MARKET, BY END USER, 2022 2029
(USD MILLION)

9.4.1 ASIA PACIFIC: RECESSION IMPACT

9.4.2 CHINA

9.4.2.1 Low manufacturing cost and increased establishment of R&D centers to drive market

TABLE 467 CHINA: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 468 CHINA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 469 CHINA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 470 CHINA: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 471 CHINA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 472 CHINA: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 473 CHINA: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 474 CHINA: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 475 CHINA: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.4.3 INDIA

9.4.3.1 Growth in pharmaceutical industry and favorable scenario for foreign direct investment to propel market

TABLE 476 INDIA: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 477 INDIA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 478 INDIA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 479 INDIA: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 480 INDIA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 481 INDIA: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 482 INDIA: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 483 INDIA: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 484 INDIA: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.4.4 JAPAN

9.4.4.1 Decline in number of clinical trials to limit market

TABLE 485 JAPAN: TOTAL NUMBER OF CLINICAL TRIALS IN JAPAN, BY THERAPEUTIC AREA, 2020, 2022, AND 2023

TABLE 486 JAPAN: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 487 JAPAN: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 488 JAPAN: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 489 JAPAN: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 490 JAPAN: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 491 JAPAN: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 492 JAPAN: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 493 JAPAN: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 494 JAPAN: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.4.5 AUSTRALIA

9.4.5.1 Favorable tax incentives and cash rebates to pharmaceutical companies to support market

TABLE 495 AUSTRALIA: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 496 AUSTRALIA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 497 AUSTRALIA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 498 AUSTRALIA: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 499 AUSTRALIA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 500 AUSTRALIA: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029

(USD MILLION)

TABLE 501 AUSTRALIA: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 502 AUSTRALIA: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 503 AUSTRALIA: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.4.6 SOUTH KOREA

9.4.6.1 Favorable government initiatives for drug development to drive market

TABLE 504 SOUTH KOREA: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 505 SOUTH KOREA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 506 SOUTH KOREA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 507 SOUTH KOREA: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 508 SOUTH KOREA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 509 SOUTH KOREA: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 510 SOUTH KOREA: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 511 SOUTH KOREA: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 512 SOUTH KOREA: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.4.7 NEW ZEALAND

9.4.7.1 Rising number of key players and growing R&D activities to support market

TABLE 513 NEW ZEALAND: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 514 NEW ZEALAND: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 515 NEW ZEALAND: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 516 NEW ZEALAND: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 517 NEW ZEALAND: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 518 NEW ZEALAND: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 519 NEW ZEALAND: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 520 NEW ZEALAND: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 521 NEW ZEALAND: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.4.8 REST OF ASIA PACIFIC

TABLE 522 REST OF ASIA PACIFIC: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 523 REST OF ASIA PACIFIC: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 524 REST OF ASIA PACIFIC: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 525 REST OF ASIA PACIFIC: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 526 REST OF ASIA PACIFIC: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 527 REST OF ASIA PACIFIC: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 528 REST OF ASIA PACIFIC: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 529 REST OF ASIA PACIFIC: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 530 REST OF ASIA PACIFIC: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.5 LATIN AMERICA

TABLE 531 LATIN AMERICA: CRO SERVICES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 532 LATIN AMERICA: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 533 LATIN AMERICA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 534 LATIN AMERICA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 535 LATIN AMERICA: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 536 LATIN AMERICA: CRO SERVICES MARKET FOR LABORATORY

SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 537 LATIN AMERICA: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 538 LATIN AMERICA: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 539 LATIN AMERICA: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 540 LATIN AMERICA: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.5.1 LATIN AMERICA: RECESSION IMPACT

9.5.2 BRAZIL

9.5.2.1 Increased government investments in pharmaceutical R&D to drive market

TABLE 541 BRAZIL: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 542 BRAZIL: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 543 BRAZIL: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 544 BRAZIL: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 545 BRAZIL: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 546 BRAZIL: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 547 BRAZIL: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 548 BRAZIL: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 549 BRAZIL: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.5.3 MEXICO

9.5.3.1 Favorable government policies for R&D and manufacturing to drive market

TABLE 550 MEXICO: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 551 MEXICO: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 552 MEXICO: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 553 MEXICO: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 554 MEXICO: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 555 MEXICO: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 556 MEXICO: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 557 MEXICO: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 558 MEXICO: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.5.4 REST OF LATIN AMERICA

TABLE 559 REST OF LATIN AMERICA: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 560 REST OF LATIN AMERICA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 561 REST OF LATIN AMERICA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 562 REST OF LATIN AMERICA: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 563 REST OF LATIN AMERICA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 564 REST OF LATIN AMERICA: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 565 REST OF LATIN AMERICA: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 566 REST OF LATIN AMERICA: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 567 REST OF LATIN AMERICA: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.6 MIDDLE EAST & AFRICA

TABLE 568 MIDDLE EAST & AFRICA: CRO SERVICES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 569 MIDDLE EAST & AFRICA: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 570 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 571 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 572 MIDDLE EAST & AFRICA: PRECLINICAL SERVICES MARKET, BY TYPE,

2022 2029 (USD MILLION)

TABLE 573 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 574 MIDDLE EAST & AFRICA: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 575 MIDDLE EAST & AFRICA: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 576 MIDDLE EAST & AFRICA: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 577 MIDDLE EAST & AFRICA: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.6.1 MIDDLE EAST & AFRICA: RECESSION IMPACT

9.6.2 MIDDLE EAST

9.6.2.1 Increase in clinical research activities to drive market

TABLE 578 MIDDLE EAST: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 579 MIDDLE EAST: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 580 MIDDLE EAST: CRO SERVICES MARKET FOR EARLY-PHASE DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 581 MIDDLE EAST: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 582 MIDDLE EAST: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 583 MIDDLE EAST: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 584 MIDDLE EAST: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 585 MIDDLE EAST: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 586 MIDDLE EAST: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

9.6.3 AFRICA

9.6.3.1 Growth in pharmaceutical industry to support market

TABLE 587 AFRICA: CRO SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 588 AFRICA: CRO SERVICES MARKET FOR CLINICAL RESEARCH SERVICES, BY PHASE, 2022 2029 (USD MILLION)

TABLE 589 AFRICA: CRO SERVICES MARKET FOR EARLY-PHASE

DEVELOPMENT SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 590 AFRICA: PRECLINICAL SERVICES MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 591 AFRICA: CRO SERVICES MARKET FOR LABORATORY SERVICES, BY TYPE, 2022 2029 (USD MILLION)

TABLE 592 AFRICA: ANALYTICAL TESTING MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 593 AFRICA: CRO SERVICES MARKET, BY THERAPEUTIC AREA, 2022 2029 (USD MILLION)

TABLE 594 AFRICA: CRO SERVICES MARKET FOR ONCOLOGY, BY TYPE, 2022 2029 (USD MILLION)

TABLE 595 AFRICA: CRO SERVICES MARKET, BY END USER, 2022 2029 (USD MILLION)

10 COMPETITIVE LANDSCAPE

10.1 INTRODUCTION

10.2 KEY STRATEGIES/RIGHT TO WIN

FIGURE 40 STRATEGIES ADOPTED BY KEY PLAYERS IN CRO SERVICES MARKET

10.3 REVENUE SHARE ANALYSIS

FIGURE 41 REVENUE ANALYSIS OF KEY PLAYERS, 2021 2023 (USD BILLION)

10.4 MARKET SHARE ANALYSIS

FIGURE 42 MARKET SHARE ANALYSIS OF KEY PLAYERS, 2023

TABLE 596 DEGREE OF COMPETITION: CRO SERVICES MARKET

10.5 COMPANY EVALUATION MATRIX

10.5.1 STARS

10.5.2 EMERGING LEADERS

10.5.3 PERVASIVE PLAYERS

10.5.4 PARTICIPANTS

FIGURE 43 COMPANY EVALUATION MATRIX, 2023

10.5.5 COMPANY FOOTPRINT

TABLE 597 INDUSTRY FOOTPRINT

TABLE 598 SERVICE FOOTPRINT

TABLE 599 REGIONAL FOOTPRINT

10.6 START-UP/SME EVALUATION MATRIX

10.6.1 PROGRESSIVE COMPANIES

10.6.2 RESPONSIVE COMPANIES

10.6.3 DYNAMIC COMPANIES

10.6.4 STARTING BLOCKS

FIGURE 44 START-UP/SME EVALUATION MATRIX, 2023

10.6.5 COMPETITIVE BENCHMARKING

TABLE 600 DETAILED LIST OF KEY START-UPS/SMES

TABLE 601 COMPETITIVE BENCHMARKING OF START-UPS/SMES

10.7 COMPETITIVE SCENARIOS & TRENDS

10.7.1 KEY SERVICES LAUNCHES

TABLE 602 KEY SERVICE LAUNCHES, JANUARY 2020 SEPTEMBER 2023

10.7.2 KEY DEALS

TABLE 603 KEY DEALS, JANUARY 2020 SEPTEMBER 2023

10.7.3 OTHER KEY DEVELOPMENTS

TABLE 604 KEY EXPANSIONS, JANUARY 2020 SEPTEMBER 2023

11 COMPANY PROFILES

11.1 KEY PLAYERS

(Business overview, Services/Solutions offered, Recent developments, MnM view, Key strengths/Right to win, Strategic choices made, and Weaknesses and Competitive threats)*

11.1.1 IQVIA INC.

TABLE 605 IQVIA INC.: COMPANY OVERVIEW

FIGURE 45 IQVIA INC.: COMPANY SNAPSHOT (2022)

11.1.2 ICON PLC

TABLE 606 ICON PLC: COMPANY OVERVIEW

FIGURE 46 ICON PLC: COMPANY SNAPSHOT (2022)

11.1.3 THERMO FISHER SCIENTIFIC INC.

TABLE 607 THERMO FISHER SCIENTIFIC INC.: COMPANY OVERVIEW

FIGURE 47 THERMO FISHER SCIENTIFIC INC.: COMPANY SNAPSHOT (2022)

11.1.4 LABORATORY CORPORATION OF AMERICA HOLDINGS

TABLE 608 LABORATORY CORPORATION OF AMERICA HOLDINGS: COMPANY OVERVIEW

FIGURE 48 LABORATORY CORPORATION OF AMERICA HOLDINGS: COMPANY SNAPSHOT (2022)

11.1.5 SYNEOS HEALTH

TABLE 609 SYNEOS HEALTH: COMPANY OVERVIEW

FIGURE 49 SYNEOS HEALTH: COMPANY SNAPSHOT (2022)

11.1.6 WUXI APPTTEC

TABLE 610 WUXI APPTTEC: COMPANY OVERVIEW

FIGURE 50 WUXI APPTTEC: COMPANY SNAPSHOT (2022)

11.1.7 CHARLES RIVER LABORATORIES

TABLE 611 CHARLES RIVER LABORATORIES: COMPANY OVERVIEW

FIGURE 51 CHARLES RIVER LABORATORIES: COMPANY SNAPSHOT (2022)

11.1.8 PAREXEL INTERNATIONAL CORPORATION

TABLE 612 PAREXEL INTERNATIONAL CORPORATION: COMPANY OVERVIEW

11.1.9 PHARMARON

TABLE 613 PHARMARON: COMPANY OVERVIEW

FIGURE 52 PHARMARON: COMPANY SNAPSHOT (2022)

11.1.10 FORTREA, INC.

TABLE 614 FORTREA, INC.: COMPANY OVERVIEW

FIGURE 53 FORTREA, INC.: COMPANY SNAPSHOT (2022)

11.1.11 MEDPACE

TABLE 615 MEDPACE: COMPANY OVERVIEW

FIGURE 54 MEDPACE: COMPANY SNAPSHOT (2022)

11.1.12 SGS SA

TABLE 616 SGS SA: COMPANY OVERVIEW

FIGURE 55 SGS SA: COMPANY SNAPSHOT (2022)

11.1.13 FRONTAGE LABS

TABLE 617 FRONTAGE LABS: COMPANY OVERVIEW

FIGURE 56 FRONTAGE LABS: COMPANY SNAPSHOT (2022)

11.1.14 EUROFINS SCIENTIFIC

TABLE 618 EUROFINS SCIENTIFIC: COMPANY OVERVIEW

FIGURE 57 EUROFINS SCIENTIFIC: COMPANY SNAPSHOT (2022)

11.1.15 PSI CRO AG

TABLE 619 PSI CRO AG: COMPANY OVERVIEW

11.1.16 BIOAGILE

TABLE 620 BIOAGILE: COMPANY OVERVIEW

11.1.17 FIRMA CLINICAL RESEARCH

TABLE 621 FIRMA CLINICAL RESEARCH: COMPANY OVERVIEW

11.1.18 ACCULAB LIFE SCIENCES

TABLE 622 ACCULAB LIFE SCIENCES: COMPANY OVERVIEW

11.1.19 NOVOTECH

TABLE 623 NOVOTECH: COMPANY OVERVIEW

11.1.20 KCR S.A.

TABLE 624 KCR S.A.: COMPANY OVERVIEW

11.1.21 LINICAL

TABLE 625 LINICAL: COMPANY OVERVIEW

11.1.22 ADVANCED CLINICAL

TABLE 626 ADVANCED CLINICAL: COMPANY OVERVIEW

11.2 OTHER PLAYERS

11.2.1 ALLUCENT

11.2.2 CLINICAL TRIAL SERVICE

11.2.3 GUIRES INC. (PEPGRA HEALTHCARE PVT. LTD.)

11.2.4 WORLDWIDE CLINICAL TRIALS

11.2.5 CTI CLINICAL TRIAL & CONSULTING

*Details on Business overview, Services/Solutions offered, Recent developments, MnM view, Key strengths/Right to win, Strategic choices made, and Weaknesses and Competitive threats might not be captured in case of unlisted companies.

12 APPENDIX

12.1 DISCUSSION GUIDE

12.2 KNOWLEDGESTORE: MARKETSandMARKETS SUBSCRIPTION PORTAL

12.3 CUSTOMIZATION OPTIONS

12.4 RELATED REPORTS

12.5 AUTHOR DETAILS

I would like to order

Product name: Contract Research Organization (CROs) Services Market by Type (Early Phase, Clinical, Lab, Consulting, Data Management), Therapeutic Area (Cancer, Infectious Disease, Neurology, Dermatology, Immunology, Hematology, Vaccines, CGT) - Global Forecast to 2029

Product link: <https://marketpublishers.com/r/CF281530DF6EN.html>

Price: US\$ 7,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/CF281530DF6EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below
and fax the completed form to +44 20 7900 3970