

Electronic Trial Master File (eTMF) Systems Market by Component (Services, Software), End-User (Pharmaceutical & Biotechnology Companies, Contract Research Organizations), Delivery Mode (On-Premise, Cloud-Based), and Region - Global Forecast to 2024

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Abstracts

“The eTMF systems market is projected to grow at a CAGR of 12.7% during the forecast period.”

The electronic trial master file (eTMF) systems market is projected to reach USD 1.8 billion by 2024 from USD 1.0 billion in 2019, at a CAGR of 12.7%. Growth in the eTMF systems market can be attributed primarily to the rising adoption of eTMF systems, a growing number of clinical trials, partnerships between biopharma companies & CROs, increasing funding to support clinical trials, and the growth in the R&D spending by pharma & biotech companies. Emerging countries are expected to provide significant opportunities for players in the market. However, budget constraints, data privacy issues, and a dearth of skilled professionals will challenge market growth in the coming years

“The software segment is expected to grow at the highest CAGR during the forecast period.”

Based on the component, the eTMF systems market is segmented into software and services. The software segment is projected to grow at the highest CAGR during the forecast period due to the availability of advanced eTMF software, increasing the focus of industry players to develop innovative eTMF systems and the growing demand for

eTMF software in developing countries.

“The pharmaceutical & biotechnology companies segment accounted for the largest share of the eTMF systems market, by end-user, in 2018.”

Based on end-user, the eTMF systems market is segmented into pharmaceutical & biotechnology companies, contract research organizations (CROs), and other end-users (medical device companies, academic research institutes, and consulting service companies). In 2018, the pharmaceutical & biotechnology companies segment accounted for the largest market share, owing to the increasing application of eTMF software in clinical project management and the availability of huge R&D budgets with large pharmaceutical & biotechnology companies.

“Increasing government funding for clinical research and a large number of clinical trials in North America to support the growth of the eTMF systems market in North America.”

Geographically, the eTMF systems market is segmented into North America, Europe, Asia Pacific, and the Rest of the World. North America accounted for the largest share of the eTMF systems market in 2018. The large market share of North America in the eTMF systems market can be attributed to the increasing government funding for clinical research, a large number of clinical trials, and the presence of several major players in the US.

Breakdown of supply-side primary interviews:

By Company Type: Tier 1: 35%, Tier 2: 45%, and Tier 3: 20%

By Designation: C-level: 35%, D-level: 25%, and Others: 40%

By Region: North America: 45%, Europe: 20%, APAC: 30%, and the RoW: 5%

The major players in this market include Veeva Systems (US), Oracle Corporation (US), Phlexglobal Limited (UK), TransPerfect Global Inc. (US), Aurea Software (US), LabCorp (US), ePharmaSolutions (US), Wingspan Technology, Inc. (US), MasterControl (US), SureClinical, Inc. (US), Dell EMC (US), Paragon Solutions (US), PharmaVigilant (US), Mayo Clinic (US), Database Integrations, Inc. (US), CareLex (US), Ennov (France), Forte Research (US), Freyr (US), Montrium (US), NCGS Inc. (US), SAFE-BioPharma (US), SterlingBio Inc. (US), BIOVIA Corp. (US), and arivis AG (Germany).

Research coverage

This report studies the eTMF systems market based on delivery mode, component, end-user, and region. The report also studies factors (such as drivers, restraints, opportunities, and challenges) affecting market growth. It analyzes the opportunities and challenges in the market and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micro markets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to four main regions and respective countries.

Key benefits of buying the report

This report focuses on various levels of analysis, such as industry trends, the market rankings of top players, and company profiles, which together form basic views and analyze the competitive landscape, emerging segments of the eTMF systems market, and high-growth regions and their drivers, restraints, challenges, and opportunities. The report will help both established firms as well as new entrants/smaller firms to gauge the pulse of the market and garner higher market shares.

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