

# **Health Economics And Outcomes Research (Heor) Services Market Outlook 2025-2034: Market Share, and Growth Analysis By Service (Real World Evidence, Payer Evidence, Pricing And Reimbursement, Epidemiology Studies, Market Access, Other Services), By Offering (Outsourced, In-House), By Service Provider, By End-Use**

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## **Abstracts**

The Health Economics And Outcomes Research (Heor) Services Market is valued at USD 2.1 billion in 2025 and is projected to grow at a CAGR of 13.5% to reach USD 6.6 billion by 2034. The Health Economics and Outcomes Research (HEOR) services market has become increasingly vital in the global healthcare ecosystem, playing a central role in supporting value-based care and evidence-based decision-making. HEOR services enable healthcare stakeholders—including pharmaceutical companies, payers, and regulatory bodies—to assess the clinical and economic value of medical interventions. By integrating cost-effectiveness analysis, real-world evidence, and patient-reported outcomes, HEOR offers a data-driven framework that informs pricing, reimbursement, and market access strategies. The growing emphasis on healthcare sustainability, coupled with the rise in specialty drugs and personalized therapies, has driven demand for advanced HEOR services. As global healthcare costs continue to rise, stakeholders are under mounting pressure to justify treatment expenditures, positioning HEOR as a strategic necessity rather than a supplementary tool in the healthcare industry. The HEOR services market saw a significant surge in activity, particularly in response to the expanding pipeline of high-cost therapies such as gene and cell therapies. Pharmaceutical companies increasingly relied on HEOR to secure favorable pricing and reimbursement outcomes, especially in Europe and North America where cost-containment policies are tightening. The integration of real-world data

(RWD) from electronic health records, wearables, and patient registries gained momentum, enhancing the accuracy of health outcomes assessments. HEOR firms also began offering end-to-end solutions—from early product development to post-market surveillance—tailored to meet regulatory expectations from agencies like the FDA and EMA. Additionally, collaborations between HEOR firms and health technology assessment (HTA) agencies expanded, reflecting the growing need for evidence that supports both clinical efficacy and economic value in competitive global markets. The HEOR services market is expected to evolve through deeper integration with digital health and artificial intelligence technologies. Predictive modeling, AI-driven analytics, and machine learning algorithms will enable more granular and proactive assessments of treatment outcomes and patient responses. With regulatory bodies increasingly accepting RWE for approval and reimbursement decisions, HEOR providers will be tasked with designing robust methodologies that ensure data integrity and transparency. The shift toward patient-centric healthcare will also influence HEOR strategies, prompting more emphasis on patient preferences and quality-of-life metrics. Emerging markets in Asia-Pacific and Latin America are projected to see rapid growth in HEOR adoption, driven by healthcare system reforms and the need to evaluate the cost-effectiveness of expanding drug formularies. Overall, the HEOR landscape will become more technologically advanced, globally inclusive, and aligned with the evolving dynamics of healthcare policy and innovation.

### Key Insights Health Economics And Outcomes Research (Heor) Services Market

Integration of real-world data sources such as EHRs, claims databases, and digital health tools is enhancing the quality and scope of HEOR analyses.

AI and machine learning are being adopted in HEOR to improve the speed, accuracy, and predictive capabilities of health outcomes and economic models.

Patient-reported outcomes are gaining prominence in HEOR strategies, reflecting the shift toward patient-centered healthcare evaluation.

Pharmaceutical companies are partnering more closely with HEOR firms from early clinical stages to optimize market access and reimbursement outcomes.

Global harmonization of HTA guidelines is fostering standardized HEOR practices, especially for multi-country drug launches and regulatory submissions.

Rising healthcare costs and budget constraints are pushing payers and policymakers to demand evidence of value through HEOR for pricing and reimbursement decisions.

Growth in personalized medicine and specialty drugs requires complex cost-effectiveness and outcomes assessments to justify high treatment costs.

Increasing regulatory acceptance of real-world evidence is strengthening the relevance and demand for comprehensive HEOR services.

Pharmaceutical and biotech firms face growing pressure to demonstrate ROI, driving investment in HEOR to support product differentiation and competitive advantage.

Variability in data quality, access to real-world data sources, and lack of standardized methodologies across regions pose significant challenges to consistent and credible HEOR outcomes.

## Health Economics And Outcomes Research (Heor) Services Market Segmentation

### By Service

Real World Evidence

Payer Evidence

Pricing And Reimbursement

Epidemiology Studies

Market Access

Other Services

### By Offering

Outsourced

In-House

By Service Provider

Consultancy

Contract Research Organizations (CRO)

By End-Use

Healthcare Provider

Healthcare Payers

Biotechnology And Pharmaceutical Companies

Government Organization

Other End-Users

Key Companies Analysed

McKesson Corporation

Optum Inc.

Cardinal Health

IQVIA Inc.

ICON PLC

PPD Inc.

Syneos Health

Medlior Health Outcomes Research Ltd.

Axtria Inc.

Parexel International

RTI Health Solutions

Wellth Inc.

Westat

SidekickHealth

Analysis Group

Carelon Research

Precision Health Economics

Avalon Health Economics LLC

Lumanity Inc.

Pharmerit BV

Epistemix Inc.

Crowdcuring

DocME

Bohn Epidemiology LLC

Health Economics And Outcomes Research (Heor) Services Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping,

*Health Economics And Outcomes Research (Heor) Services Market Outlook 2025-2034: Market Share, and Growth Anal...*

and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

### Health Economics And Outcomes Research (Heor) Services Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

### Countries Covered

North America — Health Economics And Outcomes Research (Heor) Services market data and outlook to 2034

United States

Canada

Mexico

Europe — Health Economics And Outcomes Research (Heor) Services market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Health Economics And Outcomes Research (Heor) Services  
market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Health Economics And Outcomes Research (Heor)  
Services market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Health Economics And Outcomes Research (Heor) Services market data and outlook to 2034

Brazil

Argentina

Chile

Peru

*\* We can include data and analysis of additional countries on demand.*

## Research Methodology

This study combines primary inputs from industry experts across the Health Economics And Outcomes Research (Heor) Services value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

## Key Questions Addressed

What is the current and forecast market size of the Health Economics And Outcomes Research (Heor) Services industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

## Your Key Takeaways from the Health Economics And Outcomes Research (Heor) Services Market Report

Global Health Economics And Outcomes Research (Heor) Services market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Health Economics And Outcomes Research (Heor) Services trade, costs, and supply chains

Health Economics And Outcomes Research (Heor) Services market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Health Economics And Outcomes Research (Heor) Services market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Health Economics And Outcomes Research (Heor) Services market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and Health Economics And Outcomes Research (Heor) Services supply chain analysis

Health Economics And Outcomes Research (Heor) Services trade analysis,

Health Economics And Outcomes Research (Heor) Services market price analysis, and Health Economics And Outcomes Research (Heor) Services supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Health Economics And Outcomes Research (Heor) Services market news and developments

### Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

*\* The updated report will be delivered within 3 working days*

## Contents

### 1. TABLE OF CONTENTS

- 1.1 List of Tables
- 1.2 List of Figures

### 2. GLOBAL HEALTH ECONOMICS AND OUTCOMES RESEARCH (HEOR) SERVICES MARKET SUMMARY, 2025

- 2.1 Health Economics And Outcomes Research (Heor) Services Industry Overview
  - 2.1.1 Global Health Economics And Outcomes Research (Heor) Services Market Revenues (In US\$ billion)
- 2.2 Health Economics And Outcomes Research (Heor) Services Market Scope
- 2.3 Research Methodology

### 3. HEALTH ECONOMICS AND OUTCOMES RESEARCH (HEOR) SERVICES MARKET INSIGHTS, 2024-2034

- 3.1 Health Economics And Outcomes Research (Heor) Services Market Drivers
- 3.2 Health Economics And Outcomes Research (Heor) Services Market Restraints
- 3.3 Health Economics And Outcomes Research (Heor) Services Market Opportunities
- 3.4 Health Economics And Outcomes Research (Heor) Services Market Challenges
- 3.5 Tariff Impact on Global Health Economics And Outcomes Research (Heor) Services Supply Chain Patterns

### 4. HEALTH ECONOMICS AND OUTCOMES RESEARCH (HEOR) SERVICES MARKET ANALYTICS

- 4.1 Health Economics And Outcomes Research (Heor) Services Market Size and Share, Key Products, 2025 Vs 2034
- 4.2 Health Economics And Outcomes Research (Heor) Services Market Size and Share, Dominant Applications, 2025 Vs 2034
- 4.3 Health Economics And Outcomes Research (Heor) Services Market Size and Share, Leading End Uses, 2025 Vs 2034
- 4.4 Health Economics And Outcomes Research (Heor) Services Market Size and Share, High Growth Countries, 2025 Vs 2034
- 4.5 Five Forces Analysis for Global Health Economics And Outcomes Research (Heor) Services Market

- 4.5.1 Health Economics And Outcomes Research (Heor) Services Industry Attractiveness Index, 2025
- 4.5.2 Health Economics And Outcomes Research (Heor) Services Supplier Intelligence
- 4.5.3 Health Economics And Outcomes Research (Heor) Services Buyer Intelligence
- 4.5.4 Health Economics And Outcomes Research (Heor) Services Competition Intelligence
- 4.5.5 Health Economics And Outcomes Research (Heor) Services Product Alternatives and Substitutes Intelligence
- 4.5.6 Health Economics And Outcomes Research (Heor) Services Market Entry Intelligence

## **5. GLOBAL HEALTH ECONOMICS AND OUTCOMES RESEARCH (HEOR) SERVICES MARKET STATISTICS – INDUSTRY REVENUE, MARKET SHARE, GROWTH TRENDS AND FORECAST BY SEGMENTS, TO 2034**

- 5.1 World Health Economics And Outcomes Research (Heor) Services Market Size, Potential and Growth Outlook, 2024- 2034 (\$ billion)
- 5.1 Global Health Economics And Outcomes Research (Heor) Services Sales Outlook and CAGR Growth By Service, 2024- 2034 (\$ billion)
- 5.2 Global Health Economics And Outcomes Research (Heor) Services Sales Outlook and CAGR Growth By Offering, 2024- 2034 (\$ billion)
- 5.3 Global Health Economics And Outcomes Research (Heor) Services Sales Outlook and CAGR Growth By Service Provider, 2024- 2034 (\$ billion)
- 5.4 Global Health Economics And Outcomes Research (Heor) Services Sales Outlook and CAGR Growth By End-Use, 2024- 2034 (\$ billion)
- 5.5 Global Health Economics And Outcomes Research (Heor) Services Market Sales Outlook and Growth by Region, 2024- 2034 (\$ billion)

## **6. ASIA PACIFIC HEALTH ECONOMICS AND OUTCOMES RESEARCH (HEOR) SERVICES INDUSTRY STATISTICS – MARKET SIZE, SHARE, COMPETITION AND OUTLOOK**

- 6.1 Asia Pacific Health Economics And Outcomes Research (Heor) Services Market Insights, 2025
- 6.2 Asia Pacific Health Economics And Outcomes Research (Heor) Services Market Revenue Forecast By Service, 2024- 2034 (USD billion)
- 6.3 Asia Pacific Health Economics And Outcomes Research (Heor) Services Market Revenue Forecast By Offering, 2024- 2034 (USD billion)

6.4 Asia Pacific Health Economics And Outcomes Research (Heor) Services Market Revenue Forecast By Service Provider, 2024- 2034 (USD billion)

6.5 Asia Pacific Health Economics And Outcomes Research (Heor) Services Market Revenue Forecast By End-Use, 2024- 2034 (USD billion)

6.6 Asia Pacific Health Economics And Outcomes Research (Heor) Services Market Revenue Forecast by Country, 2024- 2034 (USD billion)

6.6.1 China Health Economics And Outcomes Research (Heor) Services Market Size, Opportunities, Growth 2024- 2034

6.6.2 India Health Economics And Outcomes Research (Heor) Services Market Size, Opportunities, Growth 2024- 2034

6.6.3 Japan Health Economics And Outcomes Research (Heor) Services Market Size, Opportunities, Growth 2024- 2034

6.6.4 Australia Health Economics And Outcomes Research (Heor) Services Market Size, Opportunities, Growth 2024- 2034

## **7. EUROPE HEALTH ECONOMICS AND OUTCOMES RESEARCH (HEOR) SERVICES MARKET DATA, PENETRATION, AND BUSINESS PROSPECTS TO 2034**

7.1 Europe Health Economics And Outcomes Research (Heor) Services Market Key Findings, 2025

7.2 Europe Health Economics And Outcomes Research (Heor) Services Market Size and Percentage Breakdown By Service, 2024- 2034 (USD billion)

7.3 Europe Health Economics And Outcomes Research (Heor) Services Market Size and Percentage Breakdown By Offering, 2024- 2034 (USD billion)

7.4 Europe Health Economics And Outcomes Research (Heor) Services Market Size and Percentage Breakdown By Service Provider, 2024- 2034 (USD billion)

7.5 Europe Health Economics And Outcomes Research (Heor) Services Market Size and Percentage Breakdown By End-Use, 2024- 2034 (USD billion)

7.6 Europe Health Economics And Outcomes Research (Heor) Services Market Size and Percentage Breakdown by Country, 2024- 2034 (USD billion)

7.6.1 Germany Health Economics And Outcomes Research (Heor) Services Market Size, Trends, Growth Outlook to 2034

7.6.2 United Kingdom Health Economics And Outcomes Research (Heor) Services Market Size, Trends, Growth Outlook to 2034

7.6.2 France Health Economics And Outcomes Research (Heor) Services Market Size, Trends, Growth Outlook to 2034

7.6.2 Italy Health Economics And Outcomes Research (Heor) Services Market Size, Trends, Growth Outlook to 2034

7.6.2 Spain Health Economics And Outcomes Research (Heor) Services Market Size, Trends, Growth Outlook to 2034

## **8. NORTH AMERICA HEALTH ECONOMICS AND OUTCOMES RESEARCH (HEOR) SERVICES MARKET SIZE, GROWTH TRENDS, AND FUTURE PROSPECTS TO 2034**

8.1 North America Snapshot, 2025

8.2 North America Health Economics And Outcomes Research (Heor) Services Market Analysis and Outlook By Service, 2024- 2034 (\$ billion)

8.3 North America Health Economics And Outcomes Research (Heor) Services Market Analysis and Outlook By Offering, 2024- 2034 (\$ billion)

8.4 North America Health Economics And Outcomes Research (Heor) Services Market Analysis and Outlook By Service Provider, 2024- 2034 (\$ billion)

8.5 North America Health Economics And Outcomes Research (Heor) Services Market Analysis and Outlook By End-Use, 2024- 2034 (\$ billion)

8.6 North America Health Economics And Outcomes Research (Heor) Services Market Analysis and Outlook by Country, 2024- 2034 (\$ billion)

8.6.1 United States Health Economics And Outcomes Research (Heor) Services Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.6.1 Canada Health Economics And Outcomes Research (Heor) Services Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.6.1 Mexico Health Economics And Outcomes Research (Heor) Services Market Size, Share, Growth Trends and Forecast, 2024- 2034

## **9. SOUTH AND CENTRAL AMERICA HEALTH ECONOMICS AND OUTCOMES RESEARCH (HEOR) SERVICES MARKET DRIVERS, CHALLENGES, AND FUTURE PROSPECTS**

9.1 Latin America Health Economics And Outcomes Research (Heor) Services Market Data, 2025

9.2 Latin America Health Economics And Outcomes Research (Heor) Services Market Future By Service, 2024- 2034 (\$ billion)

9.3 Latin America Health Economics And Outcomes Research (Heor) Services Market Future By Offering, 2024- 2034 (\$ billion)

9.4 Latin America Health Economics And Outcomes Research (Heor) Services Market Future By Service Provider, 2024- 2034 (\$ billion)

9.5 Latin America Health Economics And Outcomes Research (Heor) Services Market Future By End-Use, 2024- 2034 (\$ billion)

9.6 Latin America Health Economics And Outcomes Research (Heor) Services Market Future by Country, 2024- 2034 (\$ billion)

9.6.1 Brazil Health Economics And Outcomes Research (Heor) Services Market Size, Share and Opportunities to 2034

9.6.2 Argentina Health Economics And Outcomes Research (Heor) Services Market Size, Share and Opportunities to 2034

## **10. MIDDLE EAST AFRICA HEALTH ECONOMICS AND OUTCOMES RESEARCH (HEOR) SERVICES MARKET OUTLOOK AND GROWTH PROSPECTS**

10.1 Middle East Africa Overview, 2025

10.2 Middle East Africa Health Economics And Outcomes Research (Heor) Services Market Statistics By Service, 2024- 2034 (USD billion)

10.3 Middle East Africa Health Economics And Outcomes Research (Heor) Services Market Statistics By Offering, 2024- 2034 (USD billion)

10.4 Middle East Africa Health Economics And Outcomes Research (Heor) Services Market Statistics By Service Provider, 2024- 2034 (USD billion)

10.5 Middle East Africa Health Economics And Outcomes Research (Heor) Services Market Statistics By Service Provider, 2024- 2034 (USD billion)

10.6 Middle East Africa Health Economics And Outcomes Research (Heor) Services Market Statistics by Country, 2024- 2034 (USD billion)

10.6.1 Middle East Health Economics And Outcomes Research (Heor) Services Market Value, Trends, Growth Forecasts to 2034

10.6.2 Africa Health Economics And Outcomes Research (Heor) Services Market Value, Trends, Growth Forecasts to 2034

## **11. HEALTH ECONOMICS AND OUTCOMES RESEARCH (HEOR) SERVICES MARKET STRUCTURE AND COMPETITIVE LANDSCAPE**

11.1 Key Companies in Health Economics And Outcomes Research (Heor) Services Industry

11.2 Health Economics And Outcomes Research (Heor) Services Business Overview

11.3 Health Economics And Outcomes Research (Heor) Services Product Portfolio Analysis

11.4 Financial Analysis

11.5 SWOT Analysis

## **12 APPENDIX**

- 12.1 Global Health Economics And Outcomes Research (Heor) Services Market Volume (Tons)
- 12.1 Global Health Economics And Outcomes Research (Heor) Services Trade and Price Analysis
- 12.2 Health Economics And Outcomes Research (Heor) Services Parent Market and Other Relevant Analysis
- 12.3 Publisher Expertise
- 12.2 Health Economics And Outcomes Research (Heor) Services Industry Report Sources and Methodology

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