

Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Size and Forecast (2021-2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Service (Economic Modelling or Evaluation, Real World Data Analysis and Information System, Market Access Solutions and Reimbursement, Clinical Outcome, Other Services), Service Provider (Contract Research Organizations and Consultancy), and End User (Biotechnology and Pharmaceutical Companies, Healthcare Payers, Government Organizations, and Healthcare Providers)

<https://marketpublishers.com/r/AA525554F803EN.html>

Date: October 2025

Pages: 138

Price: US\$ 3,450.00 (Single User License)

ID: AA525554F803EN

Abstracts

Executive Summary and Analysis of the Asia Pacific Health Economics and Outcome Research (HEOR) Services Market

The Asia Pacific region is rapidly emerging as the fastest-growing market for Health Economics and Outcomes Research (HEOR) globally. The market size is projected to reach approximately US\$ 540.54 million by 2031, up from US\$ 228.23 million in 2024, reflecting a robust CAGR of 14.8% from 2024 to 2031. This growth is primarily driven by significant contributions from key countries such as China, India, and Japan, where there is an increasing demand for HEOR services aimed at optimizing healthcare costs.

Healthcare professionals and decision-makers are increasingly leveraging HEOR to

enhance clinical procedures, facilitate informed decision-making, and improve patient outcomes. The expansion of HEOR practices is further supported by favorable government policies across the region, which are attracting investments and accelerating the adoption of these services. Additionally, the rising number of clinical trials in the Asia Pacific is creating substantial opportunities for HEOR service providers to deliver critical evidence regarding treatment efficacy and economic implications. As healthcare systems in the region evolve with a focus on value-based care, the demand for comprehensive HEOR services is expected to grow, positioning the Asia Pacific as a pivotal hub for health economics and outcomes research on a global scale.

Market Segmentation Analysis

The Asia Pacific HEOR services market can be segmented based on service type, service provider, and end user.

By Service: The market is divided into several categories, including economic modeling or evaluation, real-world data analysis and information systems, market access solutions and reimbursement, clinical outcomes, and others. In 2024, the economic modeling or evaluation segment is anticipated to hold the largest market share.

By Service Provider: The market is categorized into contract research organizations (CROs) and consultancy firms. The CRO segment is expected to dominate the market in 2024 due to its extensive capabilities in conducting research and providing data-driven insights.

By End User: The end users of HEOR services include biotechnology and pharmaceutical companies, healthcare payers, government organizations, and healthcare providers. The biotechnology and pharmaceutical companies segment is projected to hold the largest share in 2024, driven by their need for robust economic evaluations and market access strategies.

Market Outlook

The emergence of precision medicine represents a significant opportunity within the healthcare sector. Despite advancements, there remains a gap in evidence, thresholds, and reimbursement frameworks for precision medicine applications. Various stakeholders, including researchers, payers, and healthcare providers, are actively

working to generate new insights that can enhance the deployment of precision medicine in early drug development and its implications for health technology assessments. This presents a substantial growth opportunity for HEOR service providers to refine their offerings in strategy consulting, real-world evidence generation, modeling, microsimulation, and evidence synthesis related to precision medicine. Furthermore, HEOR guidelines and frameworks are expected to clarify the outcomes and impacts of regulatory and reimbursement policies associated with precision medicine, guiding research investments to optimize its use.

Country Insights

The Asia Pacific HEOR services market encompasses several countries, including China, Japan, India, South Korea, Australia, and others. Among these, China is projected to hold the largest market share in 2024.

China's vast population and advanced healthcare infrastructure, coupled with rapid communication advancements, are pivotal in driving the growth of HEOR services. The Chinese government is actively engaged in enhancing healthcare quality through innovative solutions. Increased investments in drug discovery and healthcare optimization are expected to further propel the growth of HEOR services in China. For instance, in September 2020, Pfizer announced a US\$ 200 million investment in CStone Pharmaceuticals to develop cancer therapeutics, which is likely to boost the demand for HEOR solutions in the country.

Moreover, academic institutions and research centers in China are increasingly adopting HEOR services to make data-driven strategic decisions. A notable collaboration between the Analysis Group and the Institute of Hematology & Blood Diseases Hospital has yielded positive results in hemophilia research, utilizing real-world evidence solutions to inform decision-making. The Chinese government is also prioritizing HEOR solutions to validate product market access, as evidenced by Allergan's approval of its XEN gel stent based on real-world evidence in April 2020.

Company Profiles

Key players in the Asia Pacific HEOR services market include PharmaLex GmbH, ICON Plc, IQVIA Holdings Inc, Syneos Health Inc, Optum Inc, Certara Inc., ExlService Holdings, Inc., Avalon Health Economics LLC, Axtria, Inc., and McKesson Corp. These companies are employing various strategies such as market expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase

market share.

In conclusion, the Asia Pacific HEOR services market is poised for significant growth, driven by increasing demand for cost-effective healthcare solutions, advancements in precision medicine, and supportive government policies.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:
- 3.3 Assumptions and Limitations

4. ASIA PACIFIC HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET - KEY MARKET DYNAMICS

- 4.1 Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Key Market Dynamics
- 4.2 Market Drivers
 - 4.2.1 Increasing Product Development
 - 4.2.2 Growing Healthcare Spending
 - 4.2.3 Surge in Clinical Trials
- 4.3 Market Restraints
 - 4.3.1 Restrictions on Access to Real-World Data (RWD)
- 4.4 Market Opportunities
 - 4.4.1 Emergence of Precision Medicines
- 4.5 Future Trends
 - 4.5.1 Digitalization in Healthcare
- 4.6 Impact of Drivers and Restraints:

5. ASIA PACIFIC HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET - ANALYSIS

5.1 Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Revenue (US\$ Million), 2021-2031

5.2 Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Forecast Analysis

6. ASIA PACIFIC HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET ANALYSIS - BY SERVICE

6.1 Economic Modelling or Evaluation

6.1.1 Overview

6.1.2 Economic Modelling or Evaluation: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

6.2 Real World Data Analysis and Information System

6.2.1 Overview

6.2.2 Real World Data Analysis and Information System: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

6.3 Market Access Solutions and Reimbursement

6.3.1 Overview

6.3.2 Market Access Solutions and Reimbursement: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

6.4 Clinical Outcome

6.4.1 Overview

6.4.2 Clinical Outcome: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

6.5 Others

6.5.1 Overview

6.5.2 Others: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7. ASIA PACIFIC HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET ANALYSIS - BY SERVICE PROVIDER

7.1 Contract Research Organizations

7.1.1 Overview

7.1.2 Contract Research Organizations: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.2 Consultancy

7.2.1 Overview

7.2.2 Consultancy: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8. ASIA PACIFIC HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET ANALYSIS - BY END USER

8.1 Biotechnology and Pharmaceutical Companies

8.1.1 Overview

8.1.2 Biotechnology and Pharmaceutical Companies: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.2 Healthcare Payers

8.2.1 Overview

8.2.2 Healthcare Payers: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.3 Government Organizations

8.3.1 Overview

8.3.2 Government Organizations: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.4 Healthcare Providers

8.4.1 Overview

8.4.2 Healthcare Providers: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9. ASIA PACIFIC HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET - COUNTRY ANALYSIS

9.1 Asia Pacific

9.1.1 Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast Analysis - by Country

9.1.1.1 Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast Analysis - by Country

9.1.1.2 China: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.2.1 China: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market Share - by Service

9.1.1.2.2 China: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market Share - by Service Provider

9.1.1.2.3 China: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market Share - by End User

9.1.1.3 Japan: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.3.1 Japan: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market Share - by Service

9.1.1.3.2 Japan: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market Share - by Service Provider

9.1.1.3.3 Japan: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market Share - by End User

9.1.1.4 India: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.4.1 India: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market Share - by Service

9.1.1.4.2 India: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market Share - by Service Provider

9.1.1.4.3 India: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market Share - by End User

9.1.1.5 South Korea: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.5.1 South Korea: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share - by Service

9.1.1.5.2 South Korea: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share - by Service Provider

9.1.1.5.3 South Korea: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share - by End User

9.1.1.6 Australia: Asia Pacific Health Economics and Outcome Research (HEOR)

Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.6.1 Australia: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share - by Service

9.1.1.6.2 Australia: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share - by Service Provider

9.1.1.6.3 Australia: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share - by End User

9.1.1.7 Rest of APAC: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.7.1 Rest of APAC: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share - by Service

9.1.1.7.2 Rest of APAC: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share - by Service Provider

9.1.1.7.3 Rest of APAC: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share - by End User

10. INDUSTRY LANDSCAPE

10.1 Overview

10.2 Expansion

10.3 Collaboration

10.4 Merger and Acquisition

10.5 Partnerships

10.6 Other Business Strategies

11. COMPANY PROFILES

11.1 PharmaLex GmbH

11.1.1 Key Facts

11.1.2 Business Description

11.1.3 Products and Services

11.1.4 Financial Overview

11.1.5 SWOT Analysis

11.1.6 Key Developments

11.2 ICON Plc

11.2.1 Key Facts

11.2.2 Business Description

11.2.3 Products and Services

11.2.4 Financial Overview

11.2.5 SWOT Analysis

11.2.6 Key Developments

11.3 IQVIA Holdings Inc

11.3.1 Key Facts

11.3.2 Business Description

11.3.3 Products and Services

11.3.4 Financial Overview

11.3.5 SWOT Analysis

11.3.6 Key Developments

- 11.4 Syneos Health Inc
 - 11.4.1 Key Facts
 - 11.4.2 Business Description
 - 11.4.3 Products and Services
 - 11.4.4 Financial Overview
 - 11.4.5 SWOT Analysis
 - 11.4.6 Key Developments
- 11.5 Optum Inc
 - 11.5.1 Key Facts
 - 11.5.2 Business Description
 - 11.5.3 Products and Services
 - 11.5.4 Financial Overview
 - 11.5.5 SWOT Analysis
 - 11.5.6 Key Developments
- 11.6 Certara Inc.
 - 11.6.1 Key Facts
 - 11.6.2 Business Description
 - 11.6.3 Products and Services
 - 11.6.4 Financial Overview
 - 11.6.5 SWOT Analysis
 - 11.6.6 Key Developments
- 11.7 ExlService Holdings, Inc.
 - 11.7.1 Key Facts
 - 11.7.2 Business Description
 - 11.7.3 Products and Services
 - 11.7.4 Financial Overview
 - 11.7.5 SWOT Analysis
 - 11.7.6 Key Developments
- 11.8 Avalon Health Economics LLC
 - 11.8.1 Key Facts
 - 11.8.2 Business Description
 - 11.8.3 Products and Services
 - 11.8.4 Financial Overview
 - 11.8.5 SWOT Analysis
 - 11.8.6 Key Developments
- 11.9 Axtria, Inc.
 - 11.9.1 Key Facts
 - 11.9.2 Business Description
 - 11.9.3 Products and Services

- 11.9.4 Financial Overview
- 11.9.5 SWOT Analysis
- 11.9.6 Key Developments
- 11.10 McKesson Corp
 - 11.10.1 Key Facts
 - 11.10.2 Business Description
 - 11.10.3 Products and Services
 - 11.10.4 Financial Overview
 - 11.10.5 SWOT Analysis
 - 11.10.6 Key Developments

12. APPENDIX

- 12.1 About the Insight Partners
- 12.2 Glossary of Terms for HEOR Services Market

List Of Tables

LIST OF TABLES

Table 1. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Segmentation

Table 2. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Table 3. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Service

Table 4. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Service Provider

Table 5. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by End User

Table 6. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Country

Table 7. China: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service

Table 8. China: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service Provider

Table 9. China: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 10. Japan: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service

Table 11. Japan: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service Provider

Table 12. Japan: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 13. India: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service

Table 14. India: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service Provider

Table 15. India: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 16. South Korea: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service

Table 17. South Korea: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service Provider

Table 18. South Korea: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 19. Australia: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service

Table 20. Australia: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service Provider

Table 21. Australia: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 22. Rest of APAC: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service

Table 23. Rest of APAC: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service Provider

Table 24. Rest of APAC: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 25. Glossary of Terms

List Of Figures

LIST OF FIGURES

Figure 1. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Segmentation - Country

Figure 2. Impact Analysis of Drivers and Restraints

Figure 3. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Revenue (US\$ Million), 2021-2031

Figure 4. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share (%) - by Service (2024 and 2031)

Figure 5. Economic Modelling or Evaluation: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 6. Real World Data Analysis and Information System: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 7. Market Access Solutions and Reimbursement: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 8. Clinical Outcome: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 9. Others: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 10. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share (%) - by Service Provider (2024 and 2031)

Figure 11. Contract Research Organizations: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 12. Consultancy: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 13. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Share (%) - by End User (2024 and 2031)

Figure 14. Biotechnology and Pharmaceutical Companies: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 15. Healthcare Payers: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 16. Government Organizations: Asia Pacific Health Economics and Outcome

Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 17. Healthcare Providers: Asia Pacific Health Economics and Outcome

Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 18. Asia Pacific Health Economics and Outcome Research (HEOR) Services Market Breakdown, by Key Countries, 2024 and 2031 (%)

Figure 19. China: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 20. Japan: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 21. India: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 22. South Korea: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 23. Australia: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 24. Rest of APAC: Asia Pacific Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

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