

Europe 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)

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Abstracts

The Europe Health Economics and Outcome Research (HEOR) services market is projected to grow significantly, reaching an estimated US\$ 1,127.97 million by 2031, up from US\$ 496.49 million in 2024. This growth represents a compound annual growth rate (CAGR) of 12.4% from 2024 to 2031.

Executive Summary and Market Analysis

The European HEOR services market encompasses key markets in Germany, the UK, France, Spain, Italy, and other European nations. The pharmaceutical sector, particularly the research-driven segment, is poised to play a crucial role in revitalizing economic growth in Europe and ensuring its competitiveness in an evolving global

landscape. According to the European Federation of Pharmaceutical Industries and Associations, the research-based pharmaceutical industry invested approximately 50 billion Euros (around US\$ 55.18 billion) in research and development across Europe in 2023. Factors such as increased healthcare investments, government support for HEOR services, and a growing number of healthcare industry players are driving market expansion in Europe.

Strategic Insights

Market Segmentation Analysis

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

1. **Service Type:** 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 held the largest market share.
2. **Service Provider:** The market is further categorized into contract research organizations (CROs) and consultancy firms. In 2024, CROs dominated the market, holding a larger share compared to consultancies.
3. **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 was the largest end user in 2024.

Market Outlook

Precision medicine is emerging as a significant segment within the healthcare industry. Research and development in this area have shown promising results for improving health outcomes. However, challenges remain, including a lack of evidence, established thresholds, and reimbursement frameworks. Various stakeholders, including researchers, payers, healthcare providers, and market players, are working to generate new insights into the applications of precision medicine in early drug development and its implications for health technology assessment. This presents substantial growth opportunities for HEOR service providers to enhance their offerings in strategy and consulting, real-world evidence, modeling and 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 concerning precision medicine applications, guiding research investments to optimize the use of precision medicine.

The HEOR services market is anticipated to experience significant growth opportunities in both North America and Europe, as these regions increasingly integrate precision medicine into healthcare settings. For example, Europe has launched the 1+ Million Genomes initiative, which aims to sequence one million genomes by 2022, leveraging genomics to enhance disease prevention and facilitate more personalized treatments. The rise of precision medicine is expected to be a key driver of market growth during the forecast period.

Country Insights

The European HEOR services market includes several countries, notably Germany, the UK, France, Italy, Spain, and the Rest of Europe. Germany is expected to hold the largest market share in 2024.

In Germany, the HEOR service landscape is fragmented, with numerous well-established research centers dedicated to health economics outcomes, such as the Hamburg Center for Health Economics (HCHE). Institutions like the University Medical Center Hamburg-Eppendorf are integral to this ecosystem. The Federal Ministry of Education and Research supports the HCHE, which provides education and training to address the unique challenges of the German healthcare system and other global healthcare systems. The increasing focus on education and training in HEOR is likely to create more job opportunities and indirectly stimulate market growth.

A notable trend in Germany is the growing utilization of real-world evidence (RWE) in healthcare decision-making. RWE is increasingly being used to complement randomized controlled trials, offering valuable insights into the effectiveness and cost-efficiency of healthcare interventions in real-world scenarios.

Company Profiles

Key players in the Europe 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, among others. These companies are pursuing various strategies, including expansion, product

innovation, and mergers and acquisitions, to deliver innovative solutions to their clients and enhance their market presence.

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