

# Europe Small Molecule Drug Discovery Market Size and Forecast (2021 - 2031)

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## Abstracts

The Europe Small Molecule Drug Discovery Market is projected to grow significantly, reaching approximately US\$ 27,559.4 million by 2031, up from US\$ 13,677.1 million in 2023, reflecting a compound annual growth rate (CAGR) of 9.2% from 2023 to 2031.

## Executive Summary and Market Analysis

The European small molecule drug discovery market, which includes key countries such as Germany, the UK, France, Italy, Spain, and others, holds the second-largest market share globally and is expected to experience robust growth in the coming years. This growth is primarily driven by strong research and development initiatives supported by substantial investments from both public and private sectors. The biotech and pharmaceutical industries in Europe are increasingly focusing on discovering novel small molecule drugs to address challenging diseases and unmet medical needs. Collaborative efforts among contract manufacturing organizations, pharmaceutical companies, and research institutions are further strengthening the region's capabilities in drug delivery and research. Germany and the UK lead the way with advanced research facilities and a regulatory environment that promotes innovation, positioning Europe as a key hub for small molecule drug discovery in the near future.

## Strategic Insights

## Market Segmentation Analysis

By Therapeutic Area: The market is categorized into Oncology, Central Nervous System, Cardiovascular, Respiratory, Orthopedics, Immunology, Rare Diseases, and Other Therapeutic Areas, with Oncology holding the largest market share in

2023.

By Process or Phase: The market is segmented into Target Discovery, Target Validation, Lead Generation and Refinement, and Preclinical Development, where Lead Generation and Refinement accounted for the largest share in 2023.

## **Market Outlook**

The pharmaceutical sector is one of the most research and development-intensive industries globally, striving for greater efficiency in meeting patient needs. The rising costs of medicines remain a significant concern for pharmaceutical companies, which rely heavily on R&D to meet cost targets. Over the past decade, the annual approval rate of new small molecule drugs has seen a substantial increase.

R&D expenditure is crucial for companies aiming to discover, develop, and produce new products, improve existing outcomes, and ensure regulatory compliance before market launch. According to a 2021 report by PhRMA Member Companies, the top 15 pharmaceutical companies collectively invested US\$ 133 billion in R&D, with approximately 44% allocated specifically to drug discovery. This increasing investment in R&D is a key driver of growth in the small molecule drug discovery market.

## **Country Insights**

The market is further segmented by country, with Germany, France, the UK, Italy, Spain, and the Rest of Europe. Germany held the largest market share in 2023, supported by a strong infrastructure for developing new drugs for chronic conditions. The demand for pharmaceuticals is rising in Germany due to the increasing prevalence of chronic diseases, and significant investments from industry players are expected to propel market growth. For example, in April 2024, Merck announced an investment of over US\$ 333.83 million (Euro 300 million) in a new research center in Darmstadt, Germany, highlighting the potential for growth in the small molecule drug discovery market in the country.

## **Company Profiles**

Key players in the market include GSK Plc, Charles River Laboratories International Inc., Boehringer Ingelheim International GmbH, Bristol-Myers Squibb Co., Merck KGaA,

ICON Plc, Revvity Inc., Danaher Corp, Thermo Fisher Scientific Inc., and Oncodesign Services. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products.

## Contents

### **1. INTRODUCTION**

- 1.1 Report Guidance
- 1.2 Market Segmentation

### **2. EXECUTIVE SUMMARY**

- 2.1 Key Insights
- 2.2 Market Attractiveness

### **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:

### **5. EUROPE SMALL MOLECULE DRUG DISCOVERY MARKET - KEY MARKET DYNAMICS**

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

### **6. SMALL MOLECULE DRUG DISCOVERY MARKET - EUROPE MARKET ANALYSIS**

- 6.1 Europe Small Molecule Drug Discovery Market Revenue (US\$ Million), 2023 - 2031
- 6.2 Europe Small Molecule Drug Discovery Market Forecast and Analysis

### **7. EUROPE SMALL MOLECULE DRUG DISCOVERY MARKET REVENUE ANALYSIS - BY THERAPEUTIC AREA**

## 7.1 Oncology

### 7.1.1 Overview

7.1.2 Oncology: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## 7.2 Central Nervous System

### 7.2.1 Overview

7.2.2 Central Nervous System: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## 7.3 Cardiovascular

### 7.3.1 Overview

7.3.2 Cardiovascular: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## 7.4 Respiratory

### 7.4.1 Overview

7.4.2 Respiratory: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## 7.5 Orthopedics

### 7.5.1 Overview

7.5.2 Orthopedics: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## 7.6 Immunology

### 7.6.1 Overview

7.6.2 Immunology: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## 7.7 Rare Diseases

### 7.7.1 Overview

7.7.2 Rare Diseases: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## 7.8 Other Therapeutic Areas

### 7.8.1 Overview

7.8.2 Other Therapeutic Areas: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## **8. EUROPE SMALL MOLECULE DRUG DISCOVERY MARKET REVENUE ANALYSIS - BY PROCESS OR PHASE**

### 8.1 Target Discovery

#### 8.1.1 Overview

8.1.2 Target Discovery: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Target Validation

8.2.1 Overview

8.2.2 Target Validation: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Lead Generation and Refinement

8.3.1 Overview

8.3.2 Lead Generation and Refinement: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.4 Preclinical Development

8.4.1 Overview

8.4.2 Preclinical Development: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## **9. EUROPE SMALL MOLECULE DRUG DISCOVERY MARKET - COUNTRY ANALYSIS**

9.1 Europe

9.1.1 Europe Small Molecule Drug Discovery Market Revenue and Forecast and Analysis - by Country

9.1.1.1 Europe Small Molecule Drug Discovery Market Revenue and Forecast and Analysis - by Country

9.1.2.2 Germany: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.1.2.2.1 Germany: Europe Small Molecule Drug Discovery Market Share - by Therapeutic Area

9.1.2.2.2 Germany: Europe Small Molecule Drug Discovery Market Share - by Process Or Phase

9.2.3.3 France: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2.3.3.1 France: Europe Small Molecule Drug Discovery Market Share - by Therapeutic Area

9.2.3.3.2 France: Europe Small Molecule Drug Discovery Market Share - by Process Or Phase

9.3.4.4 United Kingdom: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3.4.4.1 United Kingdom: Europe Small Molecule Drug Discovery Market Share - by Therapeutic Area

9.3.4.4.2 United Kingdom: Europe Small Molecule Drug Discovery Market Share - by Process Or Phase

9.4.5.5 Italy: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4.5.5.1 Italy: Europe Small Molecule Drug Discovery Market Share - by Therapeutic Area

9.4.5.5.2 Italy: Europe Small Molecule Drug Discovery Market Share - by Process Or Phase

9.5.6.6 Spain: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.5.6.6.1 Spain: Europe Small Molecule Drug Discovery Market Share - by Therapeutic Area

9.5.6.6.2 Spain: Europe Small Molecule Drug Discovery Market Share - by Process Or Phase

9.6.7.7 Rest of Europe: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.6.7.7.1 Rest of Europe: Europe Small Molecule Drug Discovery Market Share - by Therapeutic Area

9.6.7.7.2 Rest of Europe: Europe Small Molecule Drug Discovery Market Share - by Process Or Phase

## **10 INDUSTRY LANDSCAPE**

10.1 Overview

## **10 COMPANY PROFILES**

10.1 GSK Plc

10.1.1 Key Facts

10.1.2 Business Description

10.1.3 Products and Services

10.1.4 Financial Overview

10.1.5 SWOT Analysis

10.1.6 Key Developments

10.2 Charles River Laboratories International Inc

10.2.1 Key Facts

10.2.2 Business Description

10.2.3 Products and Services

10.2.4 Financial Overview

- 10.2.5 SWOT Analysis
- 10.2.6 Key Developments
- 10.3 Boehringer Ingelheim International GmbH
  - 10.3.1 Key Facts
  - 10.3.2 Business Description
  - 10.3.3 Products and Services
  - 10.3.4 Financial Overview
  - 10.3.5 SWOT Analysis
  - 10.3.6 Key Developments
- 10.4 Bristol-Myers Squibb Co
  - 10.4.1 Key Facts
  - 10.4.2 Business Description
  - 10.4.3 Products and Services
  - 10.4.4 Financial Overview
  - 10.4.5 SWOT Analysis
  - 10.4.6 Key Developments
- 10.5 Merck KGaA
  - 10.5.1 Key Facts
  - 10.5.2 Business Description
  - 10.5.3 Products and Services
  - 10.5.4 Financial Overview
  - 10.5.5 SWOT Analysis
  - 10.5.6 Key Developments
- 10.6 ICON Plc
  - 10.6.1 Key Facts
  - 10.6.2 Business Description
  - 10.6.3 Products and Services
  - 10.6.4 Financial Overview
  - 10.6.5 SWOT Analysis
  - 10.6.6 Key Developments
- 10.7 Revvity Inc
  - 10.7.1 Key Facts
  - 10.7.2 Business Description
  - 10.7.3 Products and Services
  - 10.7.4 Financial Overview
  - 10.7.5 SWOT Analysis
  - 10.7.6 Key Developments
- 10.8 Danaher Corp
  - 10.8.1 Key Facts

- 10.8.2 Business Description
- 10.8.3 Products and Services
- 10.8.4 Financial Overview
- 10.8.5 SWOT Analysis
- 10.8.6 Key Developments
- 10.9 Thermo Fisher Scientific Inc.
  - 10.9.1 Key Facts
  - 10.9.2 Business Description
  - 10.9.3 Products and Services
  - 10.9.4 Financial Overview
  - 10.9.5 SWOT Analysis
  - 10.9.6 Key Developments
- 10.10 Oncodesign Services
  - 10.10.1 Key Facts
  - 10.10.2 Business Description
  - 10.10.3 Products and Services
  - 10.10.4 Financial Overview
  - 10.10.5 SWOT Analysis
  - 10.10.6 Key Developments

## **11. APPENDIX**

- 11.1 About The Insight Partners

## List Of Tables

### LIST OF TABLES

- Table 1. Europe Small Molecule Drug Discovery Market Segmentation
- Table 3. Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Table 4. Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Therapeutic Area
- Table 5. Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Process Or Phase
- Table 6. Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country
- Table 7. Germany: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Therapeutic Area
- Table 8. Germany: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Process Or Phase
- Table 9. France: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Therapeutic Area
- Table 10. France: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Process Or Phase
- Table 11. United Kingdom: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Therapeutic Area
- Table 12. United Kingdom: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Process Or Phase
- Table 13. Italy: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Therapeutic Area
- Table 14. Italy: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Process Or Phase
- Table 15. Spain: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Therapeutic Area
- Table 16. Spain: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Process Or Phase
- Table 17. Rest of Europe: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Therapeutic Area
- Table 18. Rest of Europe: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Process Or Phase
- Table 19. Heat Map Analysis by Key Players

## List Of Figures

### LIST OF FIGURES

Figure 1. Europe Small Molecule Drug Discovery Market Segmentation - Country

Figure 4. Europe Small Molecule Drug Discovery Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Europe Small Molecule Drug Discovery Market Revenue (US\$ Million), 2023 - 2031

Figure 7. Europe Small Molecule Drug Discovery Market Share (%) - by Therapeutic Area, 2023 and 2031

Figure 8. Oncology: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Central Nervous System: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. Cardiovascular: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 11. Respiratory: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. Orthopedics: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. Immunology: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 14. Rare Diseases: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 15. Other Therapeutic Areas: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Europe Small Molecule Drug Discovery Market Share (%) - by Process Or Phase, 2023 and 2031

Figure 17. Target Discovery: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Target Validation: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 19. Lead Generation and Refinement: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Preclinical Development: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. Europe Small Molecule Drug Discovery Market Breakdown by Key Countries, 2023 and 2031 (%)

Figure 22. Germany: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. France: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 24. United Kingdom: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Italy: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 26. Spain: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 27. Rest of Europe: Europe Small Molecule Drug Discovery Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 28. Company Positioning & Concentration

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