

Middle East & Africa Clinical Trials Market Forecast to 2028 - Regional Analysis - by Study Design (Interventional, Observational, and Expanded Access), Phase (Phase I, Phase II, Phase III, and Phase IV), and Indication (Autoimmune/Inflammation, Pain Management, Oncology, CNS Condition, Diabetes, Obesity, Cardiovascular, and Others)

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Abstracts

The Middle East & Africa clinical trials market is expected to grow from US\$ 1,524.94 million in 2022 to US\$ 1,923.39 million by 2028. It is estimated to grow at a CAGR of 3.9% from 2022 to 2028.

Adoption of Decentralized Clinical Trials and Hybrid Clinical Trials Fuels Middle East & Africa clinical trials market.

In decentralized clinical trials (DCT), patients' physical access to hospital-based trial sites is reduced or eliminated. In DCTs, digital technologies are used to enable access of patients to clinical research, remote data collection and monitoring, and communication between investigators and participants. A hybrid clinical trial approach combines home-based and on-site activities, bringing the best patient experience and meeting complex protocol regimes, gaining traction across various therapeutic areas and trial phase journeys. Initially, due to challenges such as patient privacy, data security, regulatory barriers, and complex protocol regimes, the adoption of DCT was affected. However, due to the COVID-19 pandemic, the sponsors of clinical trials adopted decentralized and hybrid clinical techniques for developing drugs. They could not continue with traditional trials as they required in-person visits. Due to the restrictions for travel, the only way to gather data and keep trials going was to work

remotely and adopt technology much faster than they would have otherwise. Therefore, decentralization broadens trial access to reach a larger number and potentially a more diverse pool of patients.

Further, hybrid clinical trials allow sponsors to strategically incorporate decentralized clinical trial (DCT) elements into study designs. These trial models offer unprecedented flexibility, so more companies are interested in hybrid trials, and the resulting growth is redefining the industry landscape. According to ObvioHealth, the FDA plans to unveil protocols in 2023 to support the use of DCT methods, inspiring confidence in these components for future clinical research. Thus, the increasing focus on using decentralized and hybrid clinical trials over traditional clinical trial methods is expected to provide lucrative opportunities for the clinical trials market during the forecast period.

Middle East & Africa Clinical Trials Market Overview

The clinical trials market in the Middle East & Africa is segmented into Saudi Arabia, the UAE, South Africa, and the Rest of Middle East & Africa. The regional growth is attributed to rising rate of cancer and investments in developing healthcare infrastructure. Factors such as growing awareness of the advantages of clinical trials, government showing a propensity to spend on healthcare infrastructure and research are likely to further propel the clinical trials market growth during the forecast period.

Middle East & Africa Clinical Trials Market Revenue and Forecast to 2028 (US\$ Million)

Middle East & Africa Clinical Trials Market Segmentation

The Middle East & Africa clinical trials market is segmented into phase, study design, indication, and country.

Based on phase, the Middle East & Africa clinical trials market is segmented into phase I, phase II, phase III, and phase IV. The phase III segment registered the largest Middle East & Africa clinical trials market share in 2022.

Based on study design, the Middle East & Africa clinical trials market is segmented into interventional, observational, and expanded access. The interventional segment held the largest Middle East & Africa clinical trials market share in 2022.

Based on indication, the Middle East & Africa clinical trials market is segmented into autoimmune/inflammation, pain management, oncology, CNS condition, diabetes, obesity, cardiovascular, and others. The oncology segment held the largest Middle East & Africa clinical trials market share in 2022.

Based on country, the Middle East & Africa clinical trials market has been categorized into Saudi Arabia, South Africa, the UAE, and the Rest of Middle East & Africa. Saudi Arabia dominated the Middle East & Africa clinical trials market share in 2022.

ICON Plc; IQVIA Holdings Inc; Laboratory Corp of America Holdings; Parexel International Corp; SGS SA; Syneos Health Inc; Thermo Fisher Scientific Inc; and WuXi AppTec Co Ltd. are some of the leading companies operating in the Middle East & Africa clinical trials market.

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