

North America Small Molecule Drug Discovery Market Size and Forecast (2021 - 2031)

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Abstracts

The North America Small Molecule Drug Discovery Market is projected to grow significantly, reaching approximately US\$ 56,040.1 million by 2031, up from US\$ 26,303.5 million in 2023, reflecting a compound annual growth rate (CAGR) of 10.0% from 2023 to 2031.

Executive Summary and Market Analysis

The small molecule drug discovery market in North America is experiencing steady growth driven by several key factors. A primary catalyst is the increasing focus of pharmaceutical and biotechnology companies on robust research and development initiatives aimed at discovering innovative and effective small molecule drugs. The market is benefiting from substantial investments in the pharmaceutical sector, which are enhancing advanced drug discovery technologies and expediting product development. Additionally, the rising incidence of chronic diseases, particularly cancer, is fueling the demand for new treatment options, further propelling market growth. The United States is at the forefront, supported by a strong research infrastructure, the presence of major global pharmaceutical firms, and a favorable regulatory environment. Canada and Mexico are also showing promising developments, with improving healthcare systems and government initiatives to promote biomedical research. Collectively, these factors are expected to drive the North American small molecule drug discovery market in the coming years.

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 divided into Target Discovery, Target Validation, Lead Generation and Refinement, and Preclinical Development, where Lead Generation and Refinement dominated in 2023.

Market Outlook

The integration of artificial intelligence (AI) and related technologies is making drug discovery more cost-effective and efficient. AI facilitates innovative data collection and management methods, reducing reliance on manual processes. Leading biopharmaceutical companies are leveraging AI platforms to accelerate drug discovery. For example, Pfizer utilizes IBM Watson to enhance its search for immuno-oncology drugs, while Sanofi has partnered with Exscientia to discover therapies for metabolic diseases. Genentech employs an AI system from GNS Healthcare to explore cancer treatments. AI tools are increasingly used for screening and identifying compounds, as well as minimizing potential drug interactions.

The rapid adoption of AI in healthcare has led many pharmaceutical companies to form partnerships with AI firms to identify drug targets and design new drugs. Notable collaborations include Merck's partnership with BenevolentAI and Exscientia in 2023, aimed at enhancing AI-driven design and discovery capabilities. Additionally, Evommune Inc. partnered with Accutar Biotechnology Inc. to discover novel small molecule drug candidates for chronic inflammatory diseases, leveraging Accutar's AI platform and Evommune's expertise.

Country Insights

The North American market is segmented by country into the United States, Canada, and Mexico, with the United States holding the largest market share in 2023. The growth in the US market is primarily driven by the increasing prevalence of chronic diseases such as cardiovascular diseases and cancer. According to the American Cancer Society, approximately 2 million new cancer cases are expected in 2024, with around 611,000 deaths projected. This scenario is prompting significant investments in research and development for novel drug molecules. A robust drug pipeline and

increasing approvals for small molecule drugs are anticipated to further stimulate market growth, alongside heightened awareness of advanced therapeutic options.

Company Profiles

Key players in the North America Small Molecule Drug Discovery 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, and Thermo Fisher Scientific Inc. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products.

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