2014 CRO Market Size Projections: 2012-2018
Report Overview

ISR’s report gives quantitative insight into the perpetual question: “What is the size of the CRO market?” The data provide a thorough, rational perspective for clinical development services segmented by phase, geography, and service line.

Methodologies:

ISR utilizes both publicly available information and data obtained through our syndicated primary market research efforts.

Report Structure:

1. Executive Summary
2. Overall Market Size and Growth
   - Top-down approach to market size
   - R&D sources and distribution
   - Model adjustments – From R&D to CRO market size
   - Development spending
   - Phase I-IV development spending
   - Outsourced Phase I-IV development spending
   - 2014 full model analysis
3. 2014 Geographic Assessment
4. 2014 Service-line Assessment
5. 2014 Development Phase I-IV Assessment
6. 2012-2018 CRO Market Model
8. 2012 Public CRO Market Share

Why ISR?

1. ISR has leveraged data from our primary market research. This data, coupled with the “facts and figures” from secondary sources, allow for intelligent projections into the CRO market size.
2. The use of primary research data gives ISR the unique ability to break down the outsourced market further than ever before, by offering geographic, service line, and Phase I-IV assessments.

What you will learn in this report:

- Estimated R&D expenditures through 2018
- Projected spending through 2018 segmented by source (sponsor type) and by:
  - Development
  - Phase I-IV Development
  - Outsourced Phase I-IV Development
- 2014 Geographic Distribution of CRO market size
- 2014 Service-line Assessment of CRO market size
- 2014 Development Phase I-IV Assessment of CRO market size

Up next: Full table of contents and sample pages
Table of Contents

Copyright and Usage Guidelines
Methodology
Executive Summary
Introduction

Overall market size and growth
  Top-down approach to market size
  R&D sources and distribution
    Table 1: R&D expenditures by segment (2012-2018)
  Model adjustments – From R&D to CRO market size
    Development spending
    Table 2: Development as a percent of R&D by segment (2014)
    Table 3: Development expenditures by segment (2012-2018)
  Phase I-IV development spending
    Table 4: Ph I-IV development as a percent of development by segment (2014)
    Table 5: Ph I-IV development expenditures by segment (2012-2018)
  Outsourced Phase I-IV development spending
    Table 6: Outsourced Ph I-IV development as a percent of development by segment (2012-2018)
    Table 7: Outsourced Ph I-IV development expenditures by segment (2012-2018)
  2014 full model analysis

2014 Geographic Assessment
  Table 8: 2014 geographic distribution (%) of the CRO market size
  Table 9: 2014 geographic distribution ($B) of the CRO market size

2014 Service-line Assessment
  Table 10: 2014 service-line distribution (%) of the CRO market size
  Table 11: 2014 service-line distribution ($B) of the CRO market size

2014 Development Phase I-IV Assessment
  Table 10: 2014 development phase distribution (%) of the CRO market size
  Table 11: 2014 development phase distribution ($B) of the CRO market size

2012-2018 CRO market model
  2014-2018 CRO market model – growth rates

2012 Public CRO market share
  Table 12: 2012 public CRO market shares

About Industry Standard Research
Introduction

"The only constant is change." This famous quote has been attributed to people ranging from Heraclitus, an ancient Greek philosopher who lived ~100 years before Plato, to Francois de la Rochefoucauld, a French author. Those of us who have spent considerable time working in the CRO industry have our own version of a “constant” and that is constantly asking the same question: What is the size of the CRO market?

The difficulty in accurately answering this question comes from the current and historic dynamics of the industry. The CRO industry is still relatively young, highly fragmented, and a considerable proportion of the industry consists of private companies. ISR has wanted to release this report for several years and what tipped us over the edge was the decision by Quintiles to re-enter the public market. Estimating an industry market size without a clear understanding of the financial position of the market share leader seemed irresponsible.

Over the past several years, the pharmaceutical industry has witnessed a relative flattening of R&D spending. No longer can CROs and service providers count on increasing R&D budgets to fuel their growth. Growth now has to come from (1) a continued increase in outsourcing penetration and (2) stealing market share from competitors.

ISR looks at this market from a global perspective and, unless otherwise noted, all figures are global in nature.

Please note that the analysis contained in this report is solely focused on clinical development services as we do not include discovery, preclinical, commercial, or contract manufacturing services. These figures also include investigator fees, so when comparing these figures to CRO revenue, please use their top-line revenue including pass-through costs in any calculations.
2014 full model analysis

Below represents the step-down analysis from R&D to outsourced Phase I-IV clinical development spending, summarized for 2014.

2014 Full Model

In 2014, the CRO market is expected to comprise 9.6% of the total worldwide R&D market.

The full report offers geographic, service line, and Phase I-IV breakouts that are not portrayed in this chart. The data are also further segmented by source (sponsor type) and analyzed/projected from 2012-2018.
Ordering Information

To obtain full access to this report, please select one of the following licenses:

<table>
<thead>
<tr>
<th>License Type</th>
<th>Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-user License</td>
<td>A single-user license allows access to a single individual user.</td>
<td>$500 USD</td>
</tr>
<tr>
<td>Site-wide License</td>
<td>A site-wide license allows access to organization employees within a particular geographic site/location (i.e. NYC or London office).</td>
<td>$750 USD</td>
</tr>
<tr>
<td>Enterprise-wide License</td>
<td>An enterprise-wide license allows access to ALL employees in an organization – this is the recommended license if a report has widespread relevance throughout an organization.</td>
<td>$1,000 USD</td>
</tr>
</tbody>
</table>

To purchase the report with a credit card or invoice, simply click on the desired license above to be taken to the report page. If you’d like to inquire about a different payment method or have questions, contact us at Sales@ISRreports.com or +1.919.301.0106.

To schedule a call to discuss this report with one of our analysts, please e-mail us at info@ISRreports.com.

Save on this, or any ISR report, by registering a free account

Register now
- Receive a $250 instant credit towards any ISR report
- Earn 10% credit towards all future purchases
- Receive advanced notifications on ISR’s latest reports and free resources

About Industry Standard Research
Industry Standard Research (ISR) is the premier, full service market research provider to the pharma and pharma services industries. With over a decade of experience in the industry, ISR delivers an unmatched level of domain expertise.

For more information about our off-the-shelf intelligence and custom research offerings, please visit our Web site at www.ISRreports.com, email info@ISRreports.com, or follow us on twitter @ISRReports.
THE ISR DIFFERENCE
Custom-quality syndicated market research

ISR’S REPORTS vs. THE COMMON SYNDICATED REPORT

How confident are you?

RESEARCH METHODS
Mostly primary research; always appropriate for the topic

One size fits all; usually publically available data

DATA COLLECTION
ISR’s proprietary data collection tools and channels support fast, high quality data collection

Struggle to recruit the right targets and enough of them

RESPONDENTS
Sophisticated screening ensures genuine decision-makers

Undisclosed methodologies and respondent demographics

SAMPLE SIZES
Robust sample sizes that instill confidence

Often insufficient industry representation that leaves you defending results

ANALYSTS
Decades of experience means more insights that are immediately usable

Junior analysts capable of reporting numbers