

PREVIEW



## 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.

# 24

Charts and Graphs

# Q1, 2014

Publication Date

# 24

Pages

### Report Structure:

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### 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
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### About Industry Standard Research

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Introduction

act with confidence



### 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.

# Sample Page

Overall market size and growth

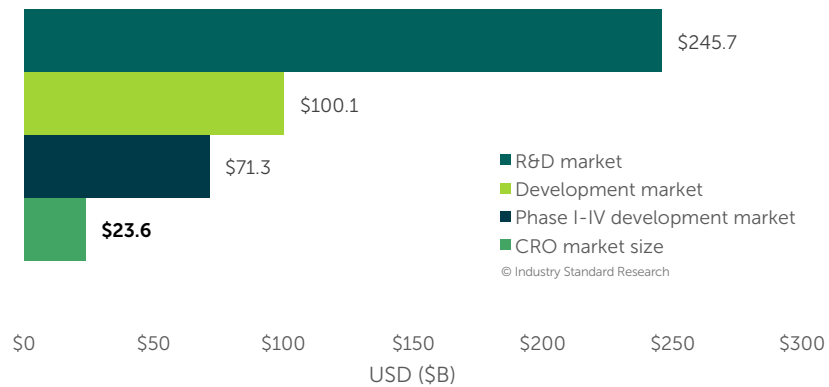
act with confidence



## 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

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## THE COMMON SYNDICATED REPORT

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### RESEARCH METHODS

Mostly primary research; always appropriate for the topic



vs.



One size fits all; usually publically available data

### DATA COLLECTION

ISR's proprietary data collection tools and channels support fast, high quality data collection

vs.

Struggle to recruit the right targets and enough of them



### RESPONDENTS

Sophisticated screening ensures genuine decision-makers

vs.



Undisclosed methodologies and respondent demographics

### SAMPLE SIZES



Robust sample sizes that instill confidence

vs.



Often insufficient industry representation that leaves you defending results

### ANALYSTS

Decades of experience means more insights that are immediately usable



vs.



Junior analysts capable of reporting numbers