Specialty CROs Market, 2016 - 2025

Description: The “Specialty CROs Market, 2016-2025” report delivers a comprehensive study on Contract Research Organizations (CROs) that provide a specialized set of research capabilities centred on a particular stage of clinical development or a range of services in a focused therapeutic area. The outsourcing model has proven to be extremely beneficial to drug developers catering to the unmet research, clinical development and even regulatory needs of both established players and start-ups in the market.

The concept of specialty CROs continues to evolve as these organizations adopt new strategies to provide their sponsors improved services in terms of both quality and efficiency. Novel business models and strategic partnerships among established and emerging players have opened new avenues to effectively tackle issues such as rising development costs, inefficient protocols and unorganized business processes.

The report assesses key drivers that have governed the evolution of specialty CROs over the past several years, along with an elaborate discussion on the upcoming trends that will likely shape the market in the coming years. In fact, one of the primary objectives of this study is to develop an understanding of the likely future evolution of the market for specialty CROs over the short-term and long-term.

The study presents an in-depth analysis of a diverse set of specialty CROs on some of the key parameters such as geographical location, types of services being offered and focused therapeutic areas. In addition, it captures the potential growth areas that will likely present opportunities for these companies and sustain the pace of growth. It is worth highlighting that despite the fact that established pharmaceutical companies have in-house R&D and clinical development capabilities, the opportunity for specialty CROs is growing.

The future evolution of this market will be primarily driven by the relatively fast paced growth of the overall pharma industry and the innovations / developments taking place in R&D. The report provides short-midterm and long-term market forecasts for the period 2016-2020 and 2020-2025, respectively. To add robustness to our forecast model, we have provided three market scenarios. The conservative, base and optimistic scenarios represent three different tracks of market evolution.

The research, analysis and insights presented in this report are backed by a comprehensive survey on capabilities of several specialty CROs. For the purpose of our analysis, we also interviewed important stakeholders in this market to solicit their opinions around the future opportunities and challenges that must be considered for a more inclusive growth.

Example Highlights

- Over the last few years, a structural transformation in the primary CRO business model to a more strategic approach has revolutionized R&D outsourcing. Newer players providing specific capabilities in the R&D value chain have witnessed a gradual acceptance.
- During our research, we have identified over 200 specialty CROs after detailed due diligence of more than 1,000 CROs based on their specific capabilities and the range of services they provide. These specialty CROs collectively cater to the multitude of research services required by drug developers.
- The US, with ~115 specialty CROs, has emerged as the primary hub of specialty CROs; this is followed by Europe with ~60 CROs. India and China, where CROs offer a relatively higher cost optimized service portfolio, are emerging as new destinations; the level of activity, however, has been fairly limited so far.
- Though the broader contract research market is highly consolidated and dominated by a handful of bigger CROs, the market within the specialty CRO segment is highly fragmented. This is unlikely to change as biotech companies will continue to prefer outsourcing specific requirements of the clinical trials instead of outsourcing the entire clinical trial programme to an individual CRO.
- We expect the overall market of specialty CROs to grow more than double in the coming decade, growing at a CAGR of 8.6%. Specific areas of growth are likely to be driven by novel services and upcoming technologies resulting in cost optimization and improved outputs.
- Some of the niche opportunity areas / approaches include Health Economics and Outcomes Research (HEOR), adaptive trial designs, and eClinical solutions. Specifically, these areas typify a growing unmet need and represent untapped areas making outsourcing an attractive option.
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