

CRO hotspots India confident to dominate

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47% serve sponsors with a revenue range of more than \$200 mn

30% focus on client expansion; 28% on revenue growth as key priorities

76% confident about increasing opportunities over next three years

- Most enterprises operating in India are small and medium-sized
- Average contract size for CROs in India is under \$50 million
- Top therapeutic focus areas are oncology, cardiovascular diseases, CNS, respiratory diseases and dermatology
- India, China, South Korea are hotspots for patient recruitment and trials
- Indian CROs are concentrated on contract and clinical research
- Quality, reliability, regulatory compliance, pricing, productivity and accessibility are key performance

metrics

FOURTH ANNUAL *BIO*SPECTRUM - CMR SURVEY OF THE CONTRACT AND CLINICAL RESEARCH ORGANIZATIONS (CROS) 2012

This report by BioSpectrum and CMR is based on a survey of 18 senior CRO executives from India.

All the respondents were from the C-level, or above, and based in India. Respondents came from companies of all revenue sizes, with 93 percent representing CROs with less than \$50 million in annual revenues, while seven percent from companies in excess of \$500 million.

The survey included a mix of quantitative and qualitative research, administered through email, and direct telephonic interviews with senior executives and experts in India. In addition, desk research was conducted to complement the survey findings.

patient recruitment

Unlike the West, Asia-Pacific has been a fertile ground for patient recruitment, with the willingness to participate by patients being

traditionally high. This can be traced to the large available patient population. In addition, the lifestyle and stress-related diseases such as diabetes and cardiovascular diseases are increasing rapidly among the Asian population, owing to increasing adaptation of sedentary lifestyle. When compared to the West, the number of available patients is also higher at each trial site as they are located at large hospitals.

According to the survey respondents of the Fourth BioSpectrum-CMR Annual Survey of the Clinical and Contract Research Organizations 2012, China and South Korea (18 percent) and India (28 percent) with their vast population are the key countries wherein the willingness to participate in clinical trials is high. The willingness to participate is also high in countries such as Malaysia, Thailand and Singapore.

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According to the survey respondents of the Fourth BioSpectrum-CMR Annual Survey of the Clinical and Contract Research Organizations 2012, Indian CROs are engaged in both clinical and contract research. 45 percent of Indian CROs are focused on contract research, while 41 percent are engaged in clinical research.

According to 14 percent of the Indian CRO survey respondents, they are engaged in biomanufacturing. Early trends indicate that India and China are seeing increase in contract manufacturing.