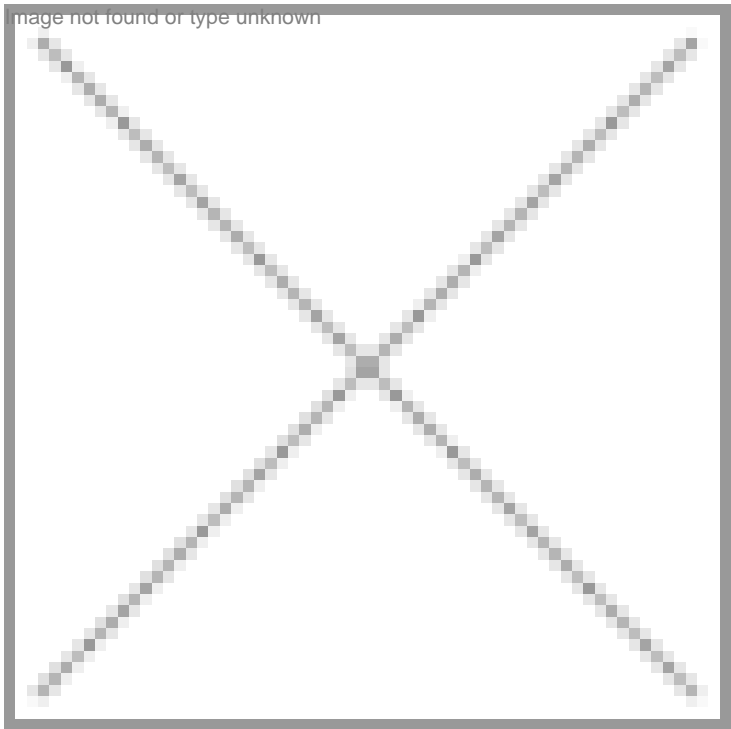


CRO hotspots

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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

With an objective to capture the key trends of the pharmaceutical CROs in the region, BioSpectrum, in association with CyberMedia Research (CMR), a premiere market research firm that specializes in competitive intelligence, advisory and consulting for life sciences and healthcare, primarily in the APAC region, conducted a survey to identify the latest trends and issues facing the pharmaceutical contract and clinical research industry.

FOURTH ANNUAL BIOSPECTRUM - 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.

Indian CROs in the Asia-Pacific CRO

Indian CROs are slowly expanding their geographical reach by focusing on multiple geographies to cater to their global clientele. According to 32 percent of the respondents of the Fourth BioSpectrum-CMR Annual Survey of the Clinical and Contract Research Organizations 2012, India is their key focus market wherein all their services are concentrated. Fourteen percent of the CROs have a presence in Malaysia, while 11 percent are focused on China.

These are the top three countries of Asia-Pacific wherein Indian CROs are focused on providing their services. Interestingly, Australia, South Korea, Singapore, Japan, and Taiwan are also geographies wherein Indian CROs have expanded their reach.

Graph1

Biospectrumcmrslug1

Asia-Pacific hotspots for clinical trials and patient recruitment

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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.