

# MARKET REPORT



Drug Discovery Services Market by Process (Target Selection, Hit-to-Lead Identification, Lead Optimization), Type (Medicinal Chemistry, Biology Services, DMPK), Drug Type (Small Molecules, Biologics), Therapeutic Areas (Oncology, Neurology) - Forecast to 2022

**BioPortfolio**  
Life Science Healthcare and  
Pharmaceutical  
Market Research and  
Corporate Data



# Drug Discovery Services Market by Process (Target Selection, Hit-to-Lead Identification, Lead Optimization), Type (Medicinal Chemistry, Biology Services, DMPK), Drug Type (Small Molecules, Biologics), Therapeutic Areas (Oncology, Neurology) - Forecast to 2022

BioPortfolio has been marketing business and market research reports from selected publishers for over fifteen years. BioPortfolio offers a personal service to our customers with dedicated research managers who will work with you to source the best report for your needs. Based in the UK, BioPortfolio is well positioned to coordinate our customers' orders sourced from over 50 global report publishers.

We are pleased to present details of this report to assist your buying decision and administrative process. You will find easy-to-use *How To Buy* information on the last page of this document.

***We look forward to being of service to you.***

*If you have bulk and/or recurring requirements, please get in touch - we can liaise with publishers to obtain sample pages and negotiate discounts on your behalf.*

**Phone:** +44 (0)7887 945155 or **Email:** [pdb@bioportfolio.co.uk](mailto:pdb@bioportfolio.co.uk)

# Drug Discovery Services Market by Process (Target Selection, Hit-to-Lead Identification, Lead Optimization), Type (Medicinal Chemistry, Biology Services, DMPK), Drug Type (Small Molecules, Biologics), Therapeutic Areas (Oncology, Neurology) - Forecast to 2022

“The drug discovery services market projected to grow at a CAGR of 11.6%.”

The drug discovery services market was valued at USD 8.32 billion in 2017 and expected to grow at a CAGR of 11.6% to reach USD 14.40 billion in 2022. The major factors driving the growth of this market are increasing research and development expenditure, inclination of major pharmaceutical companies towards outsourcing to avoid hurdles, and increasing demand for outsourcing of analytical testing and clinical trial services. However, the high cost involved in drug discovery and development, stringent regulations governing drug discovery, and animal usage are restraining the growth of this market

“The hit-to-lead generation segment is expected to register the highest CAGR during the forecast period.”

On the basis of process, the market is classified into target selection, target validation, hit-to-lead identification, lead optimization, and candidate validation. The hit-to-lead identification segment is expected to register the highest growth rate during the forecast period. The growth of this market segment is mainly driven by attributed to the emerging advanced technologies for high-throughput screening (HTS).

“The medicinal chemistry segment to grow at the fastest rate during the forecast period.”

By type, the drug discovery services market is segmented into medicinal chemistry, biology services, and drug metabolism and pharmacokinetics (DMPK). The medicinal chemistry segment is expected to register the highest growth rate during the forecast period. Increasing R&D expenditure, growing number of drug discovery and developmental activities, and increasing inclination of pharmaceutical companies towards outsourcing are among the major factors driving the growth of the medicinal chemistry segment.

“North America to hold the largest share and Asia Pacific is projected to be the fastest-growing regional market during the forecast period.”

Geographically, the drug discovery services market is dominated by North America, followed by Europe, Asia Pacific, and the Rest of the World (RoW). North America is expected to command the largest share of the drug discovery services market. The large share of this segment can be attributed to the presence of leading CROs and pharmaceutical companies in this region. The Asia Pacific region is estimated to grow at the fastest rate which can be attributed to less stringent regulations and economical manufacturing costs.

The primary interviews conducted for this report can be categorized as follows:

- By Company Type - Tier 1 - 40%; Tier 2 - 30% and Tier 3 - 30%
- By Designation - C-level - 62%, Director Level - 21%, Others - 17%
- By Region - North America - 50%, Europe - 20%, Asia Pacific - 20% , RoW- 10%

Key players operating in the drug discovery services market include Thermo Fisher Scientific (US), Albany Molecular Research Inc. (AMRI) (US), Charles River Laboratories (US), Evotec (Germany), Domainex (UK), GenScript (US), Covance (US), Selcia (UK), Viva Biotech (China), WuXi AppTec (China), SRI International (US), Pharmaceutical Product Development, LLC (PPD) (US), GVK Biosciences (India), Jubilant Biosys (India), GE Healthcare (US), Merck (Germany), Lonza (Switzerland), Piramal Enterprises (India), Advinus Therapeutics

(India), Promega Corporation (US), Syngene International (India), Aurigene (India), Agilent Technologies (US), Ubiquigent (UK), and ChemBridge Corporation (US).

#### Research Coverage:

The report analyses the drug discovery services market by process, type, drug type, therapeutic area, and region. Apart from a comprehensive geographic product analysis and market sizing, the report also provides the competitive landscape that covers the growth strategies adopted by industry players over the last three years. In addition, the report analyses developments and strategies adopted by key players to maintain and increase their shares in the market. The above-mentioned market research data, market size, and forecast of the future trends will help key market players and new entrants to make the necessary decisions to be successful in the market.

#### Benefits of Buying this Report:

This report will enable both established firms as well as new entrants/smaller firms gauge the pulse of the market, which in turn will help these firms garner greater market shares. Firms purchasing the report can use any one or a combination of the five strategies mentioned below to strengthen their market shares.

The report provides insights on the following strategies:

- **Market Penetration:** The report analyzes the drug discovery services market by process, type, drug type, and therapeutic area
- **Competitive Assessment:** In-depth assessment of the market strategies, and geographic and business segments of the leading players in the drug discovery services market
- **Product Development/Innovation:** Detailed insights on the upcoming technologies, R&D activities, and product launches in the market
- **Market Development:** Comprehensive information about emerging markets. This report analyzes the market for various drug discovery services across geographies
- **Market Diversification:** Exhaustive information about new products, untapped geographies, and recent developments in the drug discovery services market

## Additional Details

**Publisher :** MarketsandMarkets

**Reference :** PH 5682

**Number of Pages :** 170

**Report Format :** PDF

**Publisher Information :**

**MARKETSANDMARKETS**

**BioPortfolio**  
Life Science Healthcare and Pharmaceutical  
Global Market Research and Corporate Data

**BioPortfolio**  
Life Science Healthcare and Pharmaceutical  
Market Research and  
Corporate Data

**Best Prices  
Guaranteed**

**bioportfolio.co.uk**

# Table Of Contents for Drug Discovery Services Market by Process (Target Selection, Hit-to-Lead Identification, Lead Optimization), Type (Medicinal Chemistry, Biology Services, DMPK), Drug Type (Small Molecules, Biologics), Therapeutic Areas (Oncology, Neurology) - Forecast to 2022 [Report Updated: 27-10-2017]

- TABLE OF CONTENTS1 INTRODUCTION 161.1 OBJECTIVES OF THE STUDY 161.2 MARKET DEFINITION 161.3 MARKET SCOPE 171.3.1 MARKETS COVERED 171.3.2 YEARS CONSIDERED FOR THE STUDY 181.4 CURRENCY 181.5 LIMITATIONS 181.6 STAKEHOLDERS 182 RESEARCH METHODOLOGY 192.1 RESEARCH DATA 192.2 SECONDARY DATA 202.2.1 KEY DATA FROM SECONDARY SOURCES 202.3 PRIMARY DATA 212.3.1 KEY DATA FROM PRIMARY SOURCES 212.4 MARKET SIZE ESTIMATION 232.4.1 BOTTOM-UP APPROACH 232.4.2 TOP-DOWN APPROACH 242.5 DATA TRIANGULATION 252.6 ASSUMPTIONS FOR THE STUDY 263 EXECUTIVE SUMMARY 274 PREMIUM INSIGHTS 324.1 DRUG DISCOVERY SERVICES MARKET OVERVIEW 324.2 EUROPEAN DRUG DISCOVERY SERVICES MARKET SHARE, BY THERAPEUTIC AREA AND COUNTRY 334.3 DRUG DISCOVERY SERVICES MARKET, BY TYPE 344.4 GEOGRAPHICAL SNAPSHOT OF THE DRUG DISCOVERY SERVICES MARKET 355 MARKET OVERVIEW 365.1 INTRODUCTION 365.2 MARKET DYNAMICS 365.2.1 DRIVERS 375.2.1.1 Increasing R&D expenditure 375.2.1.2 Increasing demand for outsourcing analytical testing and clinical trial services 38 5.2.1.3 Initiatives for research on rare diseases 395.2.1.4 Focus on drug discovery 405.2.2 RESTRAINTS 415.2.2.1 High cost of drug discovery and development 415.2.2.2 Stringent regulations governing drug discovery, and animal usage 425.2.3 OPPORTUNITIES 425.2.3.1 Introduction of advanced technologies 425.2.3.2 Patent expiries to boost the demand for drug discovery 425.2.4 BURNING ISSUES 435.2.4.1 Need for harmonization of regulations, IP rights 436 DRUG DISCOVERY SERVICES MARKET, BY PROCESS 446.1 INTRODUCTION 456.2 TARGET SELECTION 466.3 TARGET VALIDATION 476.4 HIT-TO-LEAD IDENTIFICATION 486.5 LEAD OPTIMIZATION 496.6 CANDIDATE VALIDATION 507 DRUG DISCOVERY SERVICES MARKET, BY TYPE 517.1 INTRODUCTION 527.2 MEDICINAL CHEMISTRY 537.3 BIOLOGY SERVICES 547.4 DRUG METABOLISM AND PHARMACOKINETICS (DMPK) 558 DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE 568.1 INTRODUCTION 578.2 SMALL MOLECULES 588.3 BIOLOGICS 599 DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA 609.1 INTRODUCTION 619.2 ONCOLOGY 639.3 NEUROLOGY 649.4 CARDIOVASCULAR DISEASES 659.5 RESPIRATORY DISEASES 669.6 DIABETES 679.7 OTHER THERAPEUTIC AREAS 68 10 DRUG DISCOVERY SERVICES MARKET, BY REGION 6910.1 INTRODUCTION 7010.2 NORTH AMERICA 7110.2.1 US 7510.2.2 CANADA 7810.3 EUROPE 8210.3.1 GERMANY 8710.3.2 UK 9010.3.3 FRANCE 9210.3.4 REST OF EUROPE (ROE) 9510.4 ASIA PACIFIC (APAC) 9810.4.1 CHINA 10210.4.2 JAPAN 10510.4.3 INDIA 10710.4.4 REST OF ASIA PACIFIC (ROAPAC) 11010.5 REST OF THE WORLD (ROW) 11211 COMPETITIVE LANDSCAPE 11511.1 MARKET SHARE ANALYSIS 11512 COMPANY PROFILES 116(Overview, Strength of Product Portfolio, Business Strategy Excellence, Products Offering, and Recent Developments)\*12.1 THERMO FISHER SCIENTIFIC 11612.2 MERCK 12012.3 GE HEALTHCARE 12312.4 ALBANY MOLECULAR RESEARCH, INC. (AMRI) 12612.5 CHARLES RIVER LABORATORIES INTERNATIONAL 13012.6 EVOTEC 13412.7 PHARMACEUTICAL PRODUCT DEVELOPMENT, LLC. (PPD) 14012.8 JUBILANT BIOSYS 14212.9 COVANCE 14512.10 GENSCRIPT BIOTECH CORPORATION 14812.11 AURIGENE DISCOVERY TECHNOLOGIES 15012.12 WUXI APTEC 15312.13 SYNGENE 156\*Details on Overview, Strength of Product Portfolio, Business Strategy Excellence, Products Offering, and Recent Developments might not be captured in case of unlisted companies. 13 APPENDIX 15913.1 INDUSTRY INSIGHTS 15913.2 DISCUSSION GUIDE 16013.3 KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL 16313.4 INTRODUCING RT: REAL-TIME MARKET INTELLIGENCE 16513.5 AVAILABLE CUSTOMIZATIONS 16613.6 RELATED REPORTS 16713.7 AUTHOR DETAILS 168

# List Of Tables in Drug Discovery Services Market by Process (Target Selection, Hit-to-Lead Identification, Lead Optimization), Type (Medicinal Chemistry, Biology Services, DMPK), Drug Type (Small Molecules, Biologics), Therapeutic Areas (Oncology, Neurology) - Forecast to 2022 [Report Updated: 27-10-2017]

## LIST OF TABLES

TABLE 1 TOTAL GLOBAL PHARMACEUTICAL R&D SPENDING, 2012 TO 2022 (USD BILLION) 37

TABLE 2 R&D SPENDING, PHARMA MEMBER-COMPANIES (USD BILLION) 37

TABLE 3 ACTIVITIES OUTSOURCED IN THE PHARMACEUTICAL INDUSTRY (2014 VS. 2015) 38

TABLE 4 RESEARCH PROJECTS FUNDED BY IRDIRC BODIES 39

TABLE 5 AVERAGE COST OF DRUGS APPROVED BY YEAR 41

TABLE 6 DRUG DISCOVERY SERVICES MARKET, BY PROCESS, 2015-2022 (USD MILLION) 45

TABLE 7 TARGET SELECTION MARKET, BY REGION, 2015-2022 (USD MILLION) 46

TABLE 8 TARGET VALIDATION MARKET, BY REGION, 2015-2022 (USD MILLION) 47

TABLE 9 HIT-TO-LEAD IDENTIFICATION PROCESS MARKET, BY REGION,  
2015-2022 (USD MILLION) 48

TABLE 10 LEAD OPTIMIZATION MARKET, BY REGION, 2015-2022 (USD MILLION) 49

TABLE 11 CANDIDATE VALIDATION MARKET, BY REGION, 2015-2022 (USD MILLION) 50

TABLE 12 DRUG DISCOVERY SERVICES MARKET, BY TYPE, 2015-2022 (USD MILLION) 52

TABLE 13 MEDICINAL CHEMISTRY SERVICES MARKET, BY REGION,  
2015-2022 (USD MILLION) 53

TABLE 14 BIOLOGY SERVICES MARKET, BY REGION, 2015-2022 (USD MILLION) 54

TABLE 15 DRUG METABOLISM AND PHARMACOKINETICS SERVICES MARKET, BY REGION, 2015-2022 (USD MILLION) 55

TABLE 16 DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE, 2015-2022 (USD MILLION) 57

TABLE 17 SMALL MOLECULES MARKET, BY REGION, 2015-2022 (USD MILLION) 58

TABLE 18 BIOLOGICS MARKET, BY REGION, 2015-2022 (USD MILLION) 59

TABLE 19 GLOBAL NUMBER OF CLINICAL TRIALS IN DIFFERENT THERAPEUTIC AREAS, 2016 61

TABLE 20 GLOBAL DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 62

TABLE 21 DRUG DISCOVERY SERVICES MARKET FOR ONCOLOGY, BY REGION,

2015-2022 (USD MILLION) 64

TABLE 22 DRUG DISCOVERY SERVICES MARKET FOR NEUROLOGY, BY REGION,

2015-2022 (USD MILLION) 65

TABLE 23 DRUG DISCOVERY SERVICES MARKET FOR CARDIOVASCULAR DISEASES,

BY REGION, 2015-2022 (USD MILLION) 66

TABLE 24 DRUG DISCOVERY SERVICES MARKET FOR RESPIRATORY DISEASES, BY REGION, 2015-2022 (USD MILLION) 66

TABLE 25 DRUG DISCOVERY SERVICES MARKET FOR DIABETES, BY REGION,

2015-2022 (USD MILLION) 67

TABLE 26 DRUG DISCOVERY SERVICES MARKET FOR OTHER THERAPEUTIC AREAS,

BY REGION, 2015-2022 (USD MILLION) 68

TABLE 27 DRUG DISCOVERY SERVICES MARKET, BY REGION, 2015-2022 (USD MILLION) 71

TABLE 28 NORTH AMERICA: DRUG DISCOVERY SERVICES MARKET, BY COUNTRY,

2015-2022 (USD MILLION) 73

TABLE 29 NORTH AMERICA: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 73

TABLE 30 NORTH AMERICA: DRUG DISCOVERY SERVICES MARKET, BY TYPE,

2015-2022 (USD MILLION) 74

TABLE 31 NORTH AMERICA: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 74

TABLE 32 NORTH AMERICA: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA, 2015-2022 (USD MILLION) 75

TABLE 33 US: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 76

TABLE 34 US: DRUG DISCOVERY SERVICES MARKET, BY TYPE, 2015-2022 (USD MILLION) 77

TABLE 35 US: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 77

TABLE 36 US: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 78

TABLE 37 CANADA: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,



2015-2022 (USD MILLION) 80

TABLE 38 CANADA: DRUG DISCOVERY SERVICES MARKET, BY TYPE,

2015-2022 (USD MILLION) 80

TABLE 39 CANADA: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 81

TABLE 40 CANADA: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 81

TABLE 41 EUROPE: PHARMACEUTICAL R&D EXPENDITURE, BY COUNTRY, 2012 & 2014 83

TABLE 42 EUROPE: DRUG DISCOVERY SERVICES MARKET, BY COUNTRY/REGION,

2015 -2022 (USD MILLION) 85

TABLE 43 EUROPE: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 85

TABLE 44 EUROPE: DRUG DISCOVERY SERVICES MARKET, BY TYPE,

2015-2022 (USD MILLION) 86

TABLE 45 EUROPE: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 86

TABLE 46 EUROPE: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 87

TABLE 47 PHARMACEUTICAL R&D INVESTMENTS IN GERMANY (2010-2014) 88

TABLE 48 GERMANY: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 88

TABLE 49 GERMANY: DRUG DISCOVERY SERVICES MARKET, BY TYPE,

2015-2022 (USD MILLION) 88

TABLE 50 GERMANY: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 89

TABLE 51 GERMANY: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 89

TABLE 52 UK: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 90

TABLE 53 UK: DRUG DISCOVERY SERVICES MARKET, BY TYPE, 2015-2022 (USD MILLION) 91

TABLE 54 UK: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 91

TABLE 55 UK: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 92

TABLE 56 FRANCE: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 93

TABLE 57 FRANCE: DRUG DISCOVERY SERVICES MARKET, BY TYPE,

2015-2022 (USD MILLION) 93

TABLE 58 FRANCE: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 94

TABLE 59 FRANCE: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 94

TABLE 60 PHARMACEUTICAL R&D INVESTMENTS IN ITALY, 2009-2014 95

TABLE 61 PHARMACEUTICAL R&D EXPENDITURE IN BELGIUM, 2010-2014 96

TABLE 62 PHARMACEUTICAL PRODUCTION AND R&D EXPENDITURE IN DENMARK,

2012-2014 96

TABLE 63 ROE: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 96

TABLE 64 ROE: DRUG DISCOVERY SERVICES MARKET, BY TYPE, 2015-2022 (USD MILLION) 97

TABLE 65 ROE: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 97

TABLE 66 ROE: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 98

TABLE 67 TOTAL NUMBER OF CLINICAL TRIALS IN APAC, BY THERAPEUTIC AREA, 2016 98

TABLE 68 APAC: DRUG DISCOVERY SERVICES MARKET, BY COUNTRY/REGION,

2015-2022 (USD MILLION) 100

TABLE 69 APAC: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 100

TABLE 70 APAC: DRUG DISCOVERY SERVICES MARKET, BY TYPE, 2015-2022 (USD MILLION) 101

TABLE 71 APAC: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 101

TABLE 72 APAC: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 102

TABLE 73 CHINA: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 103

TABLE 74 CHINA: DRUG DISCOVERY SERVICES MARKET, BY TYPE,

2015-2022 (USD MILLION) 103

TABLE 75 CHINA: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 104

TABLE 76 CHINA: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 104

TABLE 77 JAPAN: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 105

TABLE 78 JAPAN: DRUG DISCOVERY SERVICES MARKET, BY TYPE,

2015-2022 (USD MILLION) 106

TABLE 79 JAPAN: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 106

TABLE 80 JAPAN: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 107

TABLE 81 INDIA: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 108

TABLE 82 INDIA: DRUG DISCOVERY SERVICES MARKET, BY TYPE, 2015-2022 (USD MILLION) 108

TABLE 83 INDIA: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 109

TABLE 84 INDIA: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 109

TABLE 85 ROAPAC: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 110

TABLE 86 ROAPAC: DRUG DISCOVERY SERVICES MARKET, BY TYPE,

2015-2022 (USD MILLION) 110

TABLE 87 ROAPAC: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 111

TABLE 88 ROAPAC: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 111

TABLE 89 ROW: DRUG DISCOVERY SERVICES MARKET, BY PROCESS,

2015-2022 (USD MILLION) 112

TABLE 90 ROW: DRUG DISCOVERY SERVICES MARKET, BY TYPE, 2015-2022 (USD MILLION) 113

TABLE 91 ROW: DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE,

2015-2022 (USD MILLION) 113

TABLE 92 ROW: DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA,

2015-2022 (USD MILLION) 114

# List Of Figures, Charts and Diagrams in Drug Discovery Services Market by Process (Target Selection, Hit-t- -Lead Identification, Lead Optimization), Type (Medicinal Chemistry, Biology Services, DMPK), Drug Type (Small Molecules, Biologics), Therapeutic Areas (Oncology, Neurology) - Forecast to 2022 [Report Updated: 27-1- -2017]

## LIST OF FIGURES

FIGURE 1 GLOBAL DRUG DISCOVERY SERVICES MARKET 17

FIGURE 2 RESEARCH DESIGN 19

FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION 22

FIGURE 4 DATA TRIANGULATION METHODOLOGY 25

FIGURE 5 DRUG DISCOVERY SERVICES MARKET, BY PROCESS, 2017 VS. 2022 (USD BILLION) 27

FIGURE 6 DRUG DISCOVERY SERVICES MARKET, BY TYPE, 2017 VS. 2022 (USD BILLION) 28

FIGURE 7 DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPE, 2017 VS. 2022 (USD BILLION) 29

FIGURE 8 DRUG DISCOVERY SERVICES MARKET, BY THERAPEUTIC AREA, 2017 VS. 2022 (USD BILLION) 30

FIGURE 9 DRUG DISCOVERY SERVICES MARKET, BY REGION, 2017 VS. 2022 (USD BILLION) 31

FIGURE 10 INCREASING DEMAND FOR OUTSOURCING OF ANALYTICAL TESTING AND CLINICAL TRIAL SERVICES TO DRIVE MARKET GROWTH 32

FIGURE 11 ONCOLOGY SEGMENT TO COMMAND THE LARGEST MARKET SHARE OF EUROPEAN DRUG DISCOVERY SERVICES MARKET IN 2017 33

FIGURE 12 MEDICINAL CHEMISTRY TO REGISTER THE HIGHEST CAGR DURING THE FORECAST PERIOD (2017-2022) 34

FIGURE 13 ASIA PACIFIC TO REGISTER THE HIGHEST CAGR BETWEEN 2017 & 2022 35

FIGURE 14 DRUG DISCOVERY SERVICES MARKET: DRIVERS, RESTRAINTS, AND OPPORTUNITIES 36

FIGURE 15 NUMBER OF REGISTERED STUDIES (2000-2017) 40

FIGURE 16 HIT-TO-LEAD IDENTIFICATION TO HOLD LARGEST MARKET SHARE IN 2017 45

FIGURE 17 MEDICINAL CHEMISTRY SEGMENT TO ACCOUNT FOR THE LARGEST SHARE OF THE DRUG DISCOVERY SERVICES MARKET 52

FIGURE 18 SMALL MOLECULES—THE LARGEST SEGMENT IN THE DRUG DISCOVERY SERVICES MARKET, BY DRUG TYPES 57

FIGURE 19 ONCOLOGY SEGMENT TO HOLD THE LARGEST SHARE IN DRUG DISCOVERY SERVICES MARKET IN 2017 61

FIGURE 20 TOTAL NUMBER OF CLINICAL TRIALS FOR ONCOLOGY (2016) 63

FIGURE 21 GEOGRAPHIC SNAPSHOT (2016): APAC MARKETS ARE EMERGING AS NEW GROWTH HOTSPOTS 70

FIGURE 22 NORTH AMERICA: DRUG DISCOVERY SERVICES MARKET SNAPSHOT 72

FIGURE 23 PHARMACEUTICAL R&D EXPENDITURE IN THE US (1990-2014) 76

FIGURE 24 TOTAL CANADIAN PHARMACEUTICAL TRADE (2004-2016) (USD BILLION) 79

FIGURE 25 YEARLY EMPLOYMENT IN MANUFACTURING PORTION OF PHARMACEUTICAL SECTOR (2005-2016) 79

FIGURE 26 PHARMACEUTICAL R&D EXPENDITURE IN EUROPE (2010-2014) 82

FIGURE 27 EUROPE: DRUG DISCOVERY SERVICES MARKET SNAPSHOT 84

FIGURE 28 APAC: DRUG DISCOVERY SERVICES MARKET SNAPSHOT 99

FIGURE 29 DRUG DISCOVERY SERVICES MARKET: MARKET SHARE (2016) 115

FIGURE 30 THERMO FISHER SCIENTIFIC: COMPANY SNAPSHOT (2016) 116

FIGURE 31 MERCK: COMPANY SNAPSHOT (2016) 120

FIGURE 32 GE HEALTHCARE: COMPANY SNAPSHOT (2016) 123

FIGURE 33 ALBANY MOLECULAR RESEARCH, INC.: COMPANY SNAPSHOT (2016) 126

FIGURE 34 CHARLES RIVER LABORATORIES INTERNATIONAL: COMPANY SNAPSHOT (2016) 130

FIGURE 35 EVOTEC: COMPANY SNAPSHOT (2016) 134

FIGURE 36 JUBILANT BIOSYS: COMPANY SNAPSHOT (2016) 142

FIGURE 37 LABCORP: COMPANY SNAPSHOT (2016) 145

FIGURE 38 GENSCRIPT BIOTECH CORPORATION: COMPANY SNAPSHOT (2016) 148

FIGURE 39 SYNGENE: COMPANY SNAPSHOT (2016) 156

# How to Buy...

Drug Discovery Services Market by Process (Target Selection, Hit-to-Lead Identification, Lead Optimization), Type (Medicinal Chemistry, Biology Services, DMPK), Drug Type (Small Molecules, Biologics), Therapeutic Areas (Oncology, Neurology) - Forecast to 2022 [Report Updated: 27-10-2017]

## Option 1 - Online

Go to our website and pay online with any major debit or credit card:

<https://www.bioportfolio.co.uk/product/139339>

## Option 2 - Request a Proforma Invoice

Fill in the details below, and either **Scan** this page **and email** it to us at [pdb@bioportfolio.co.uk](mailto:pdb@bioportfolio.co.uk) or **Fax** it to us at +44 (0)1305 791844. We will send you a Proforma Invoice and deliver your report on settlement.

**Your Name:** .....

**Job Title:** .....

**Your Email:** .....

**Your Contact Phone:** .....

**Company Name:** .....

**Address:** .....

**Post/Zip Code:** .....

**Country:** .....

**P.O. Number:** .....

**Any Other Instructions:** .....

**Pricing Options:** (please tick one)

- \$4803** | Single User Price
- \$5653** | Multi User Price
- \$6928** | Corporate License Price
- \$8500** | Enterprise License Price

**Payment Options:** (please tick one)

- Online Credit Card** (we will email you the invoice with a payment link)
- Direct Wire Transfer** (we will email you the invoice with our bank details)

**Authorising Signature:** .....

## Option 3 - Phone Us on +44 (0)7887 945155

We will be delighted to give you our personal attention.