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Infographic

# A Promising Rebound

Selected Insights from the Annual Clinical Trials Roundup: 2024 Edition

## Key Findings

The rebound in clinical trial starts in 2023 signals a return to form after last year's decline. However, the overall increase still fell short of gains made in pre-pandemic years, indicating some residual pressures on the clinical trial landscape.

## Phase I–III clinical trial activity by volume and growth

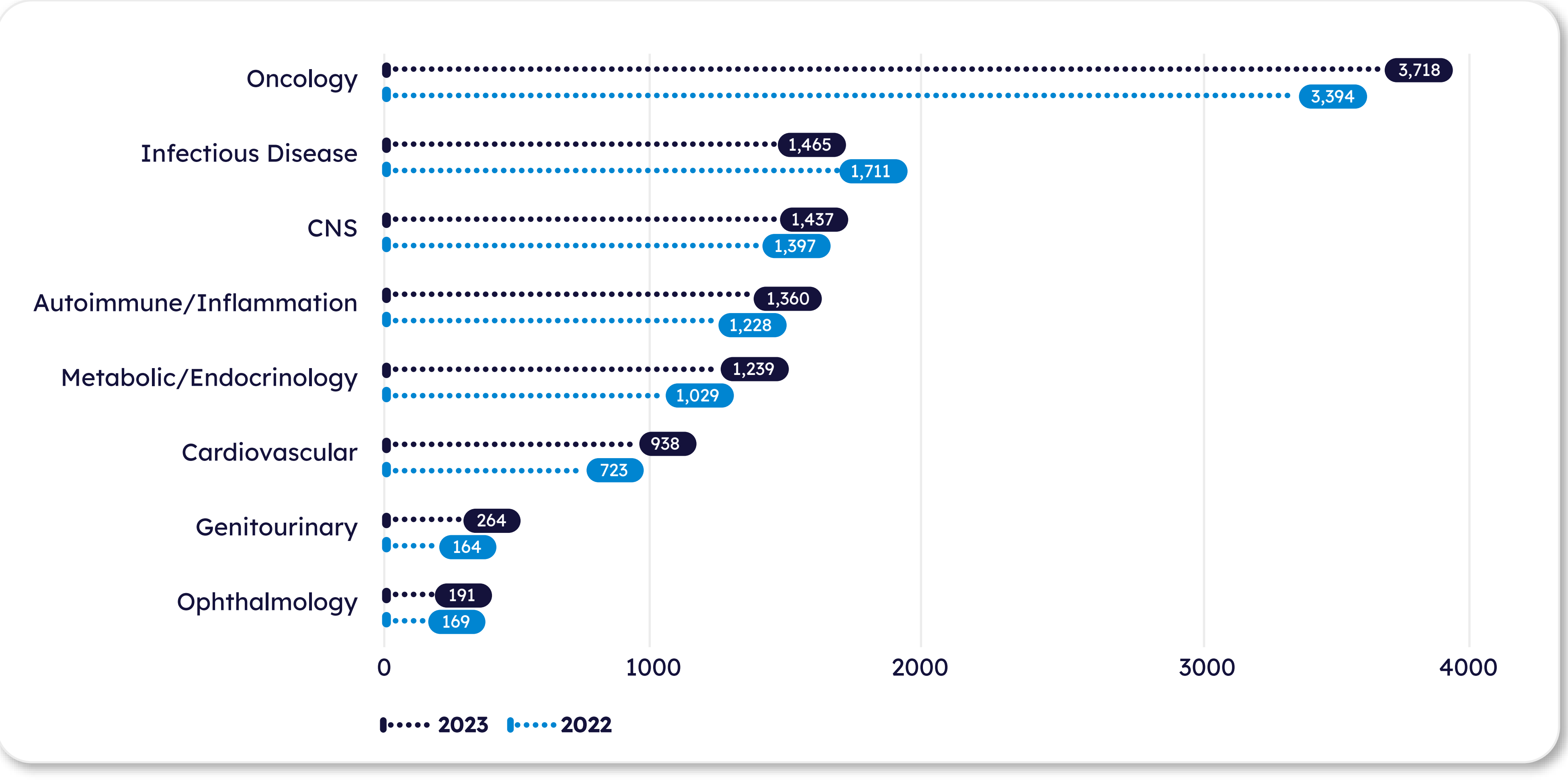
Trialtrove captured 9,959 Phase I–III clinical trials investigating at least one drug and with a disclosed start date in 2023, an increase of 9.4% from the previous year and a recovery from 2022's 12.5% decline in trial starts.

| Year of trial initiation | 2023 | 2022 | 2021 | 2020 | 2019 | 2018 | 2017 |
|---|---|---|---|---|---|---|---|
| Trial count | 9,959 | 9,104 | 10,410 | 9,819 | 7,765 | 7,606 | 6,794 |
| Year-over-year growth | 9.4% | -12.5% | 6% | 26% | 2% | 12% | 12% |
| Trial count (excluding COVID-19 trials) | 9,654 | 8,541 | 9,077 | 7,424 | 7,765 | 7,606 | 6,794 |
| Year-over-year growth (excluding COVID-19 trials) | 13% | -6% | 22% | -4% | 2% | 12% | 12% |

Source: Trialtrove, June 2024

## Phase I–III clinical trial initiations by therapeutic area[1]

In 2023, oncology remained the lead therapeutic area by far, posting an increase of 9.5% from 2022. All therapeutic areas showed growth except for infectious disease, which declined 14%.

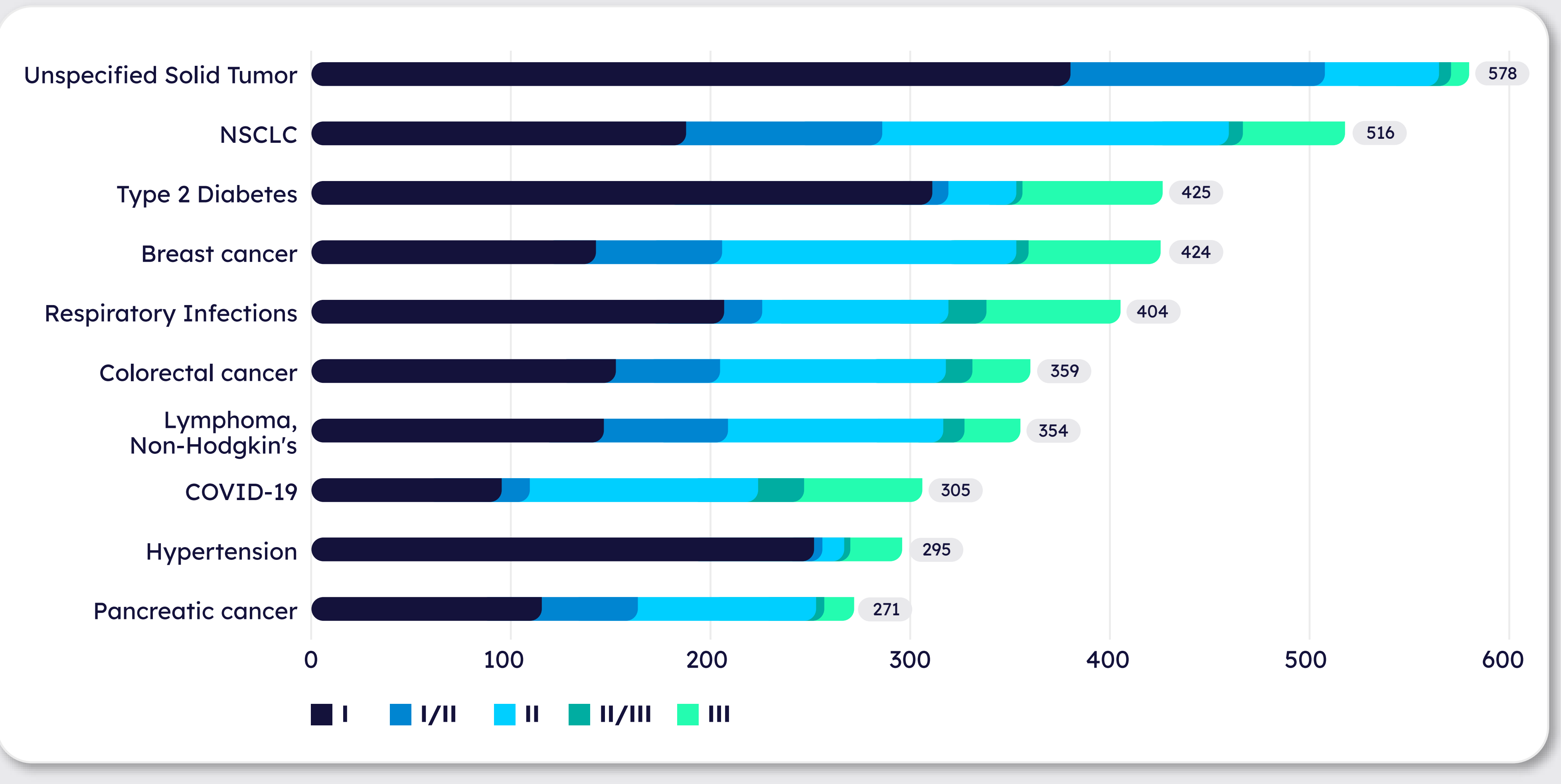



[1]Trials that include multiple indications across different TAs will be counted for each targeted TA. As such, the sum of trial counts for the eight TAs will be higher than the total number of Phase I–III trials started in 2023. Trial counts for ID include activity from vaccines (infectious diseases), which is a separate TA module within Trialtrove. For the purposes of this analysis, all ID activity has been combined into a single TA.

Source: Trialtrove, June 2024

## Top 10 diseases in Phase I–III clinical trial initiations

Unspecified solid tumor remained the top disease for a second straight year. Non-small cell lung cancer took the No. 2 spot from COVID-19, which slipped from second to eighth place in 2023.




Source: Trialtrove, June 2024

## Rankings of top 10 industry trial sponsors

AstraZeneca wrested the No. 1 position back from Merck & Co., which fell to third place. Sino Biopharmaceutical jumped to eighth, becoming the second Chinese pharma company to enter the top 10 after Jiangsu Hengrui Pharmaceuticals.

| Sponsor | 2023 Rank (2022 Rank) | 2023 Trials (2022 Trials) |
|---|---|---|
| AstraZeneca | 1 (2) | 139 (122) |
| Pfizer | 2 (4) | 128 (112) |
| Merck & Co. | 3 (1) | 126 (148) |
| Roche | 3 (3) | 126 (114) |
| Jiangsu Hengrui Pharmaceuticals | 5 (5) | 120 (106) |
| Bristol-Myers Squibb | 6 (8) | 98 (84) |
| Eli Lilly | 7 (9) | 95 (79) |
| Sino Biopharmaceutical | 8 (11) | 85 (61) |
| Novartis | 9 (6) | 74 (92) |
| Johnson & Johnson | 10 (7) | 66 (85) |

Source: Trialtrove, June 2024

## A Brighter Future?

- Clinical Trials on the Rise: After a decline in 2022, clinical trial starts were on the upswing in 2023.
- Pandemic's Influence Wanes: Pandemic-related fluctuations in clinical trial starts appear to have eased up.
- Pressures and Risks: The complex landscape still must face the effects of the industry's adoption of new technologies, regulatory burdens, and drug pricing negotiations.

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