

APAC on the Rise

Highlights from the white paper **Exploring the Asia-Pacific Clinical Trials Landscape: Asking the Five W's**

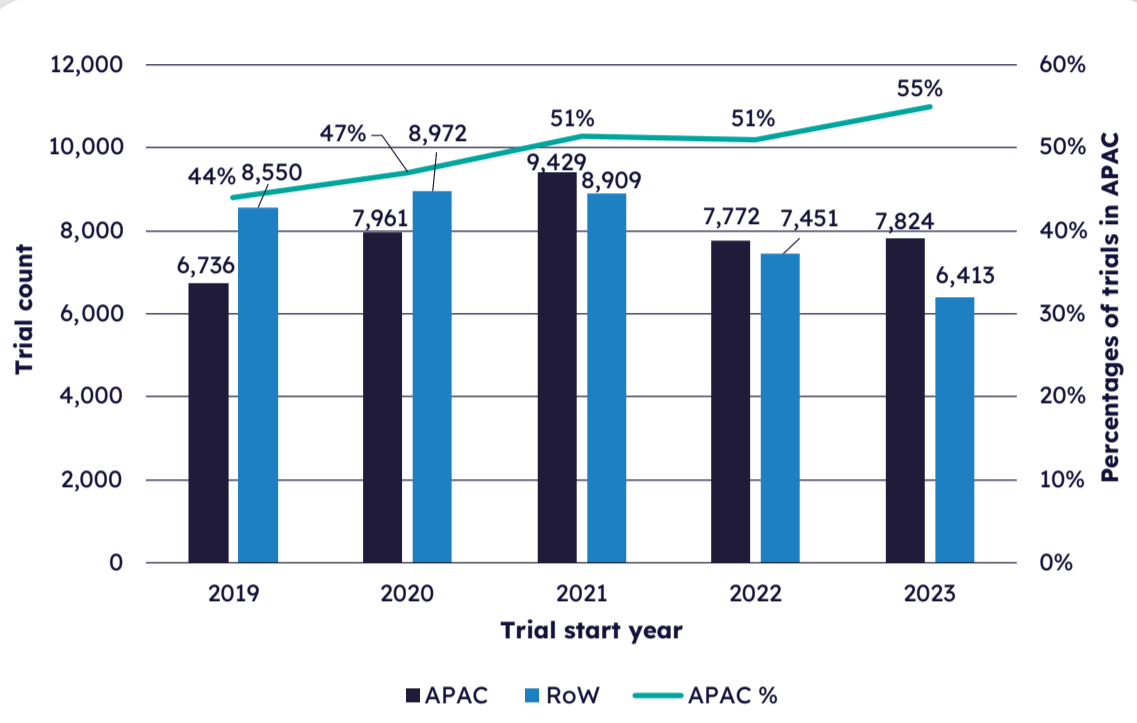


Introduction

The Asia-Pacific (APAC) region has emerged as a leader in the global clinical trial landscape amid a significant increase in clinical trials and growing international recognition. Several key factors have driven this shift, including a diverse and substantial patient population, cost effectiveness in conducting clinical trials, and a favorable regulatory environment.

Number and percentage of Phase I-IV trials starting in APAC/RoW, 2019-23

The total number of APAC trial starts increased from 6,736 in 2019 to 7,824 in 2023, with a CAGR of 3%. Some statistics to highlight: 55% of global trials included a trial location in APAC in 2023, and the number of trials initiated in APAC has exceeded those in the rest of the world (RoW) since 2021.



Source: Trialtrove, August 2024

Number of Phase I-IV trials starts in APAC by trial locations, percentage of APAC trials, and CAGR, 2019-23

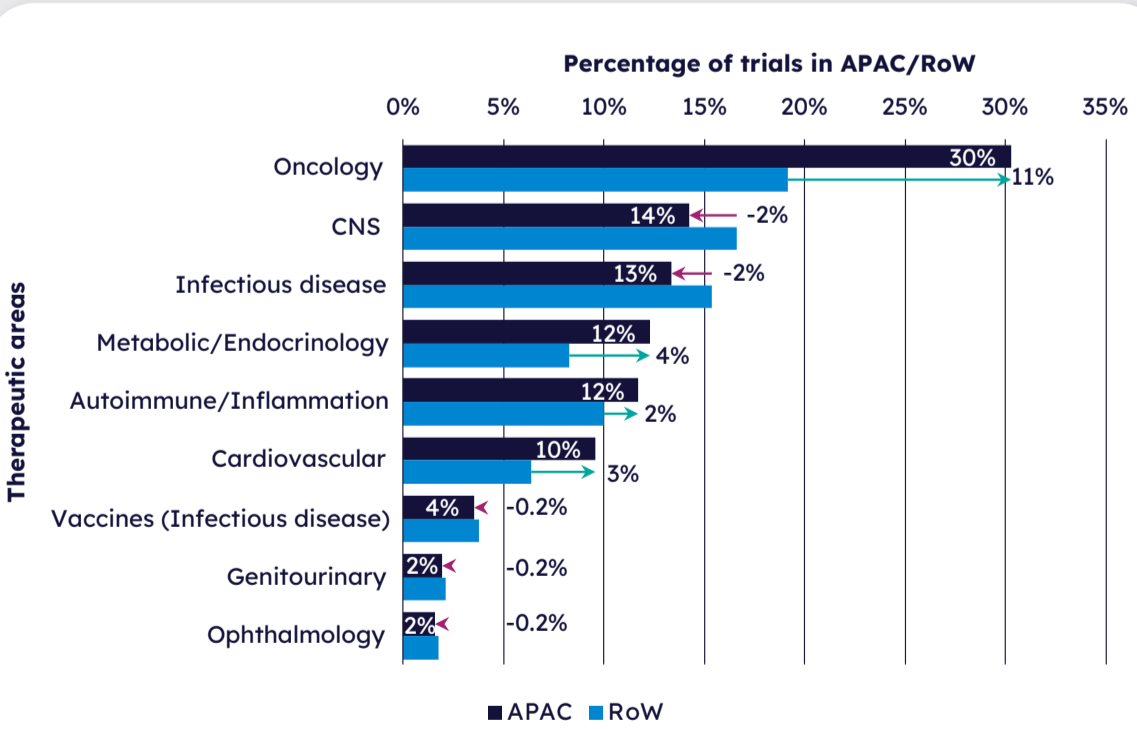
China has been the dominant force driving clinical trial activity in the APAC region, hosting 62% of trials in the region. China is also the only major APAC trial location experiencing positive CAGR growth, at 8%.

Start year	China	Japan	South Korea	India	Australia	Rest of APAC
2019	3,766	909	735	614	674	641
2020	4,646	875	834	908	745	716
2021	5,701	1,000	996	939	868	780
2022	4,854	752	819	746	769	607
2023	5,486	703	603	580	636	510
% in APAC	62%	11%	10%	10%	9%	8%
CAGR	8%	-5%	-4%	-1%	-1%	-4%

Source: Trialtrove, August 2024

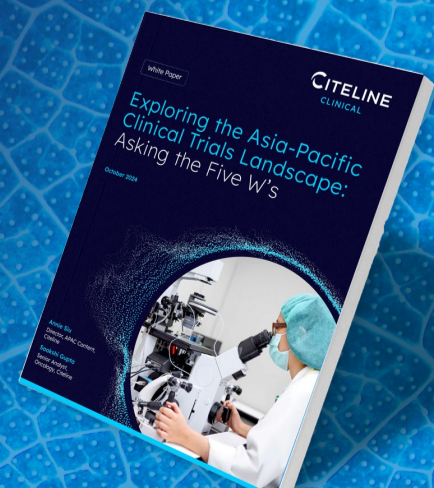
Percentages of trials that initiated in APAC and RoW by therapeutic area, 2019-23

Oncology continues to lead in both the APAC and RoW regions, with a more significant margin in APAC. Note that 30% of trials initiated in the APAC region are oncology trials, while this number decreases to 19% for the RoW.



Source: Trialtrove, August 2024

Discover more about APAC clinical trials trends and what the future looks like for the region in our white paper: **“Exploring the Asia-Pacific Clinical Trials Landscape: Asking the Five W's.”**



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