CITELINE CLINICAL

Infographic

Phase I-III Clinical Trials Overview

Key insights from our Annual Clinical Trials Roundup white paper

Key Findings

The decline in 2022 clinical trials reflects the various macroeconomic pressures faced by the biopharma industry, which led to a crunch in funding. In addition, economic and political factors such as the ongoing Russo-Ukrainian war, and stalled economic growth in China contributed to the decrease.

Phase I–III clinical trial activity by volume and growth

Activity

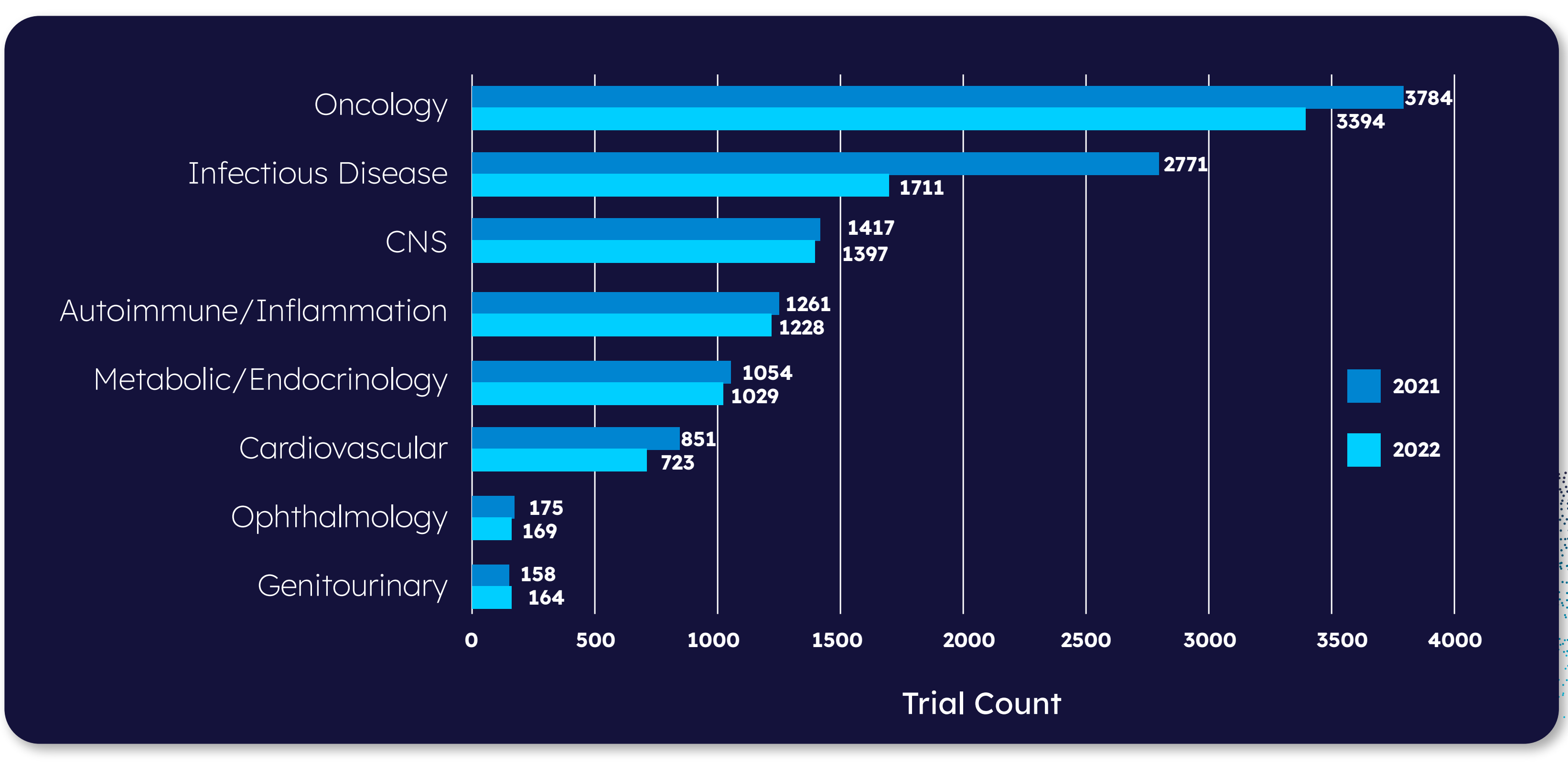
Trialtrove captured 9,104 Phase I–III clinical trials investigating at least one drug and with a disclosed start date in 2022, returning a year-on-year decline of 12.5% for the first downturn since 2016.

Year of trial initiation	2022	2021	2020	2019	2018	2017	2016
Trial count	9,104	10,410	9,819	7,765	7,606	6,794	6,067
Year-on-year growth (%)	-12.5%	6%	26%	2%	12%	12%	N/A
Trial count (excluding COVID-19 trials)	8,541	9,077	7,424	7,765	7,606	6,794	6,067
Year-on-year growth (excluding COVID-19 trials, %)	-6%	22%	-4%	2%	12%	12%	N/A

Phase I-III clinical trial initiations by therapeutic area

Therapeutic areas

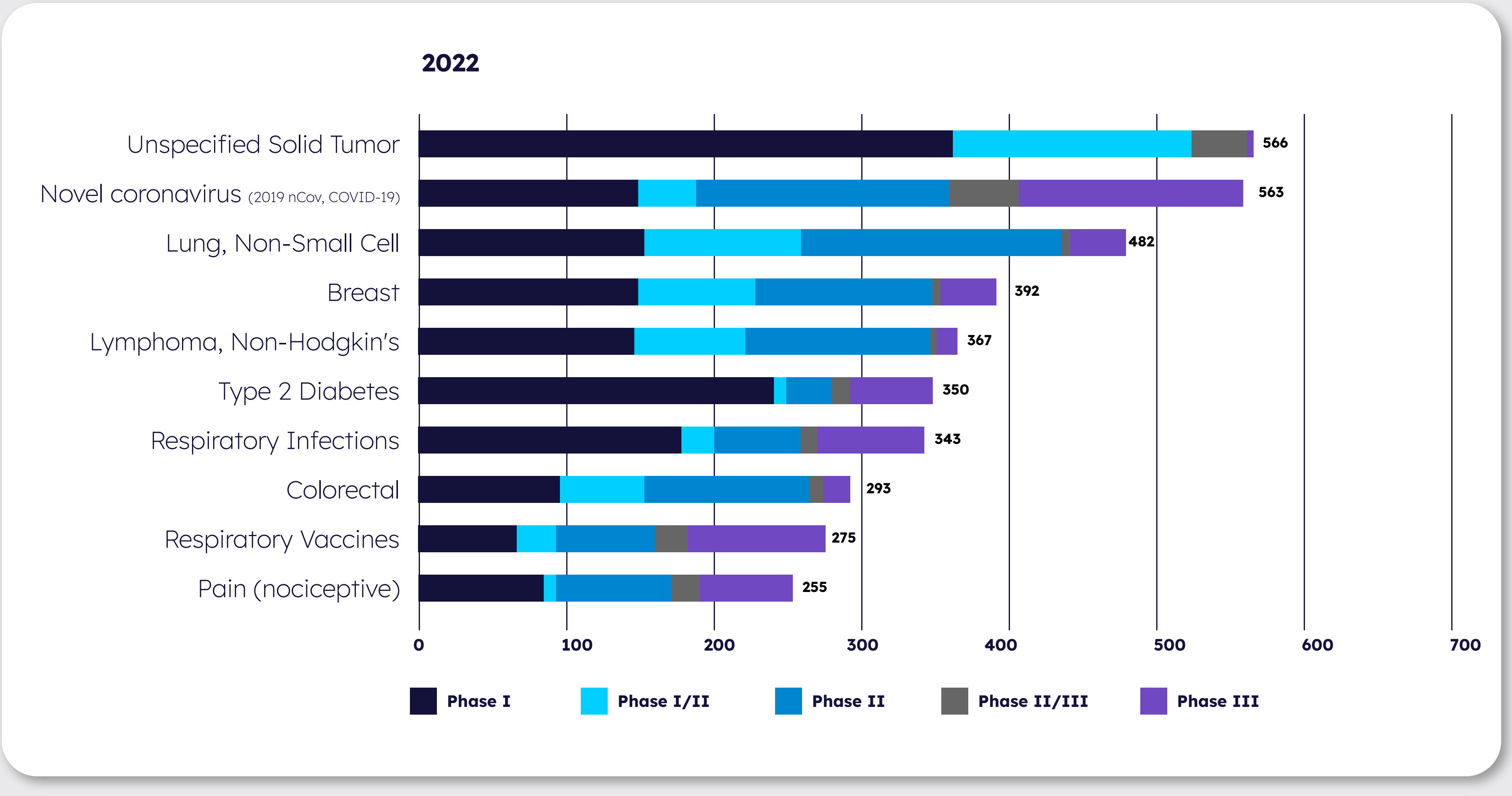
In 2022, oncology remained the top-ranking therapeutic area (TA) by far, even though its trial initiations were down by 10%. Trials decreased in all top 10 TAs except genitourinary, which posted 4% growth.



Top 10 diseases in Phase I–III clinical trial initiations

Initiations

After a two-year reign, COVID-19 finally surrendered its No. 1 spot to an oncology disease, unspecified solid tumor, though it remains in a close second place.



Top 10 industry trial sponsors by trial volumes

Sponsors

The top 10 sponsors in 2022 remain the same as in 2021. However, Merck & Co. dethroned AstraZeneca as No. 1, pushing AstraZeneca into second place. Roche dropped from second to third place.

Sponsor	2022 Trials	2022 Ranking	2021 Trials	2021 Ranking
Merck & Co.	148	1	151	3
AstraZeneca	122	2	172	1
Roche	114	3	162	2
Pfizer	112	4	122	5
Jiangsu Hengrui	106	5	130	4
Novartis	92	6	121	7
Johnson & Johnson (JNJ)	85	7	122	6
Bristol Myers Squibb (BMS)	84	8	120	8
Eli Lilly	79	9	80	9
GlaxoSmithKline (GSK)	70	10	76	10

A complex, evolving landscape

- **Decline in Clinical Trials:** We saw fewer clinical trials in 2022 than in 2021, which experienced a massive rebound from the pandemic's disruptions.
- **Year of Adjustments:** 2022 saw a host of pressures placed upon the healthcare industry inside and out.
- **Stability and Resilience:** Even as the clinical trials landscape shifts and evolves, glimpses of stability are seen and the resilience shown through the pandemic is expected to persevere.