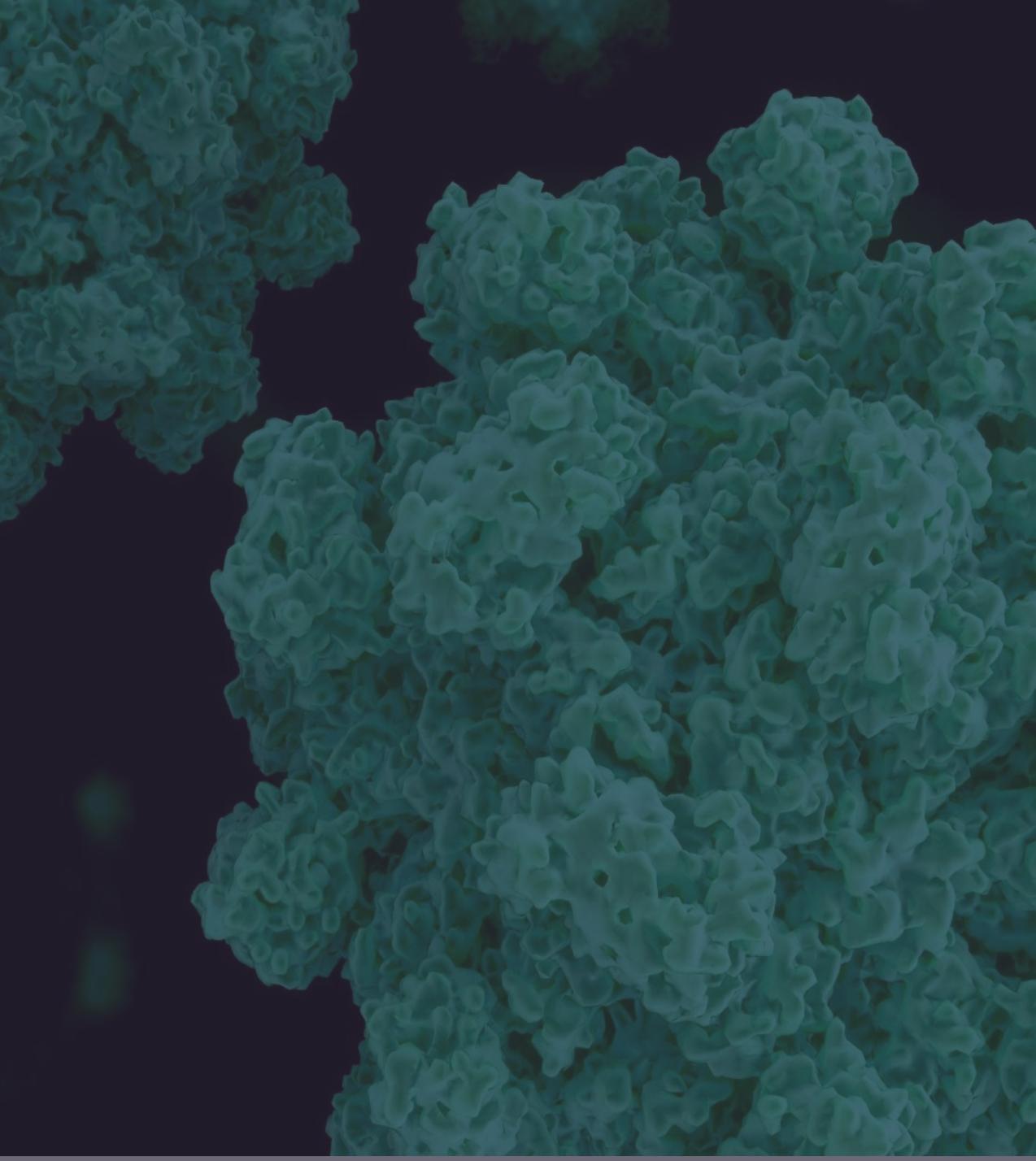




2023 Clinical Trial Roundup and 2024 Trends

CLINICAL TRIALS SUPPLY SOUTHEAST
April 2024

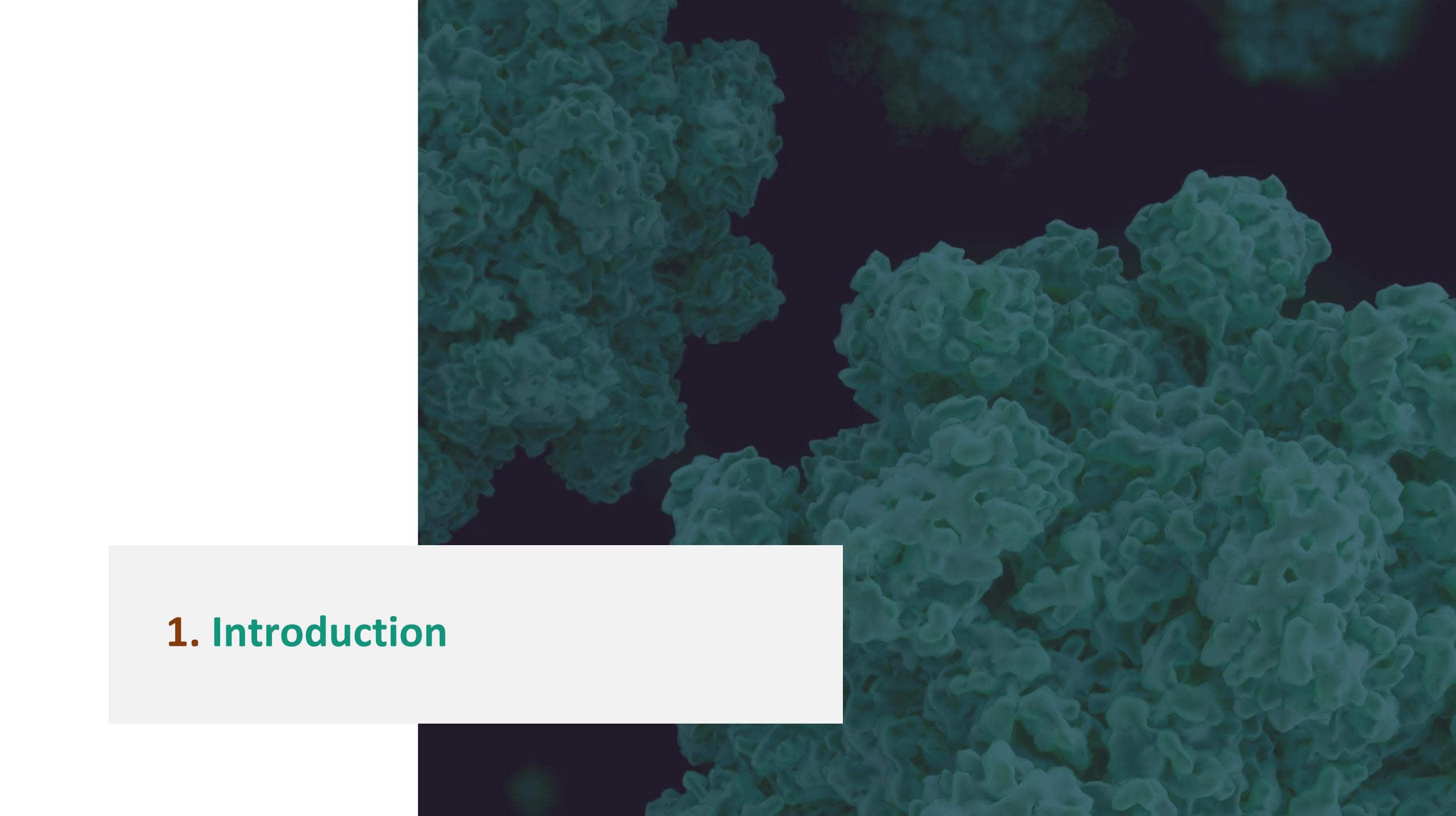
Scotty Chung-Siu, MPH
Managing Analyst, Clinical Trials, GlobalData

A large, dark teal background image on the left side of the slide, showing a complex, porous, and textured surface, possibly a microscopic view of a material or biological structure. The texture consists of many small, interconnected, rounded shapes, creating a dense, cellular appearance.

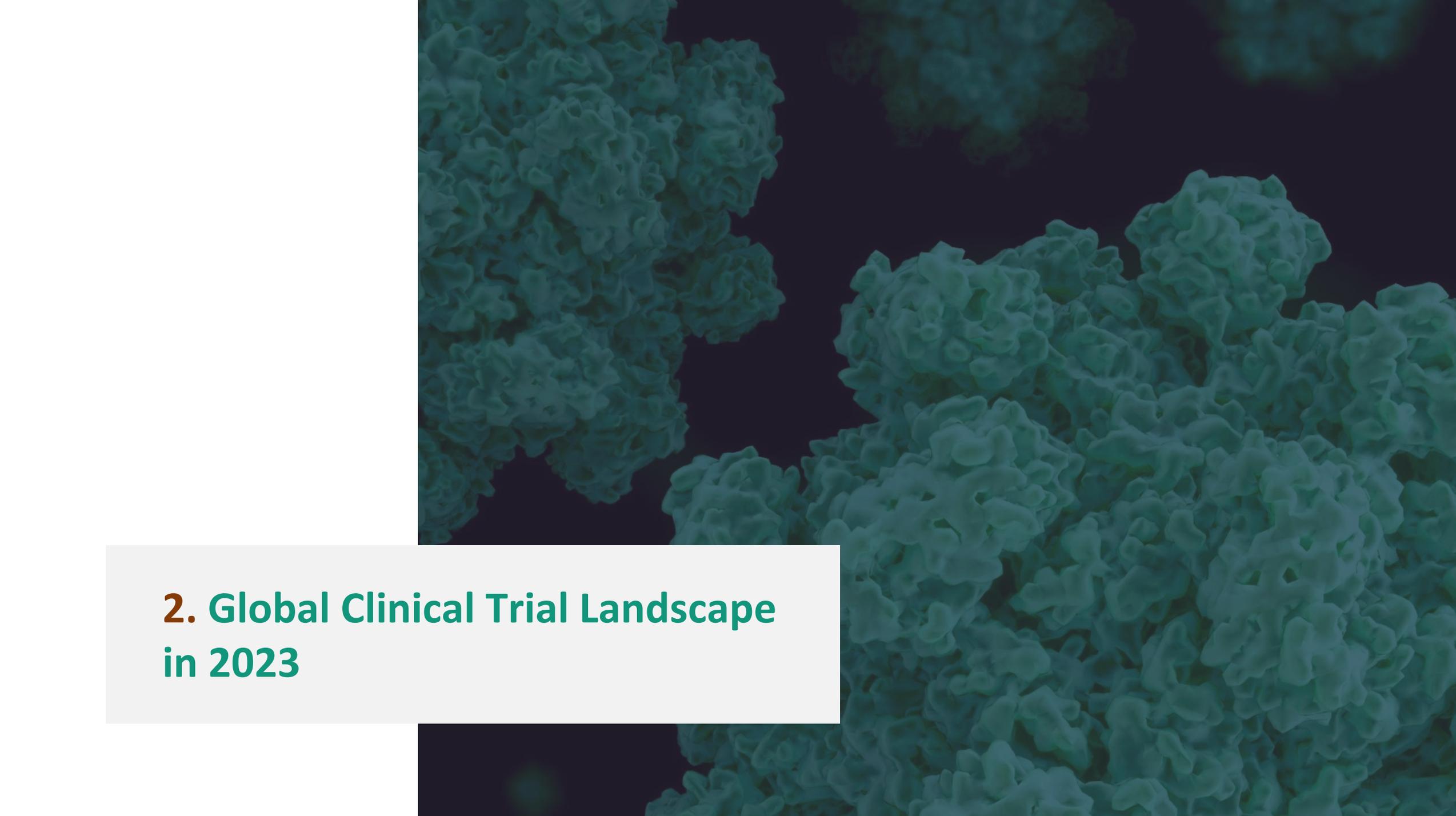
Agenda



- 1 Introduction
- 2 Global Clinical Trial Landscape in 2023
- 3 Trends in 2024
- 4 Key Takeaways



1. Introduction

A microscopic view of cells, likely cancer cells, showing their irregular, rounded shapes and textured surfaces. The cells are rendered in shades of teal and green against a dark background, with some cells appearing more prominent than others.

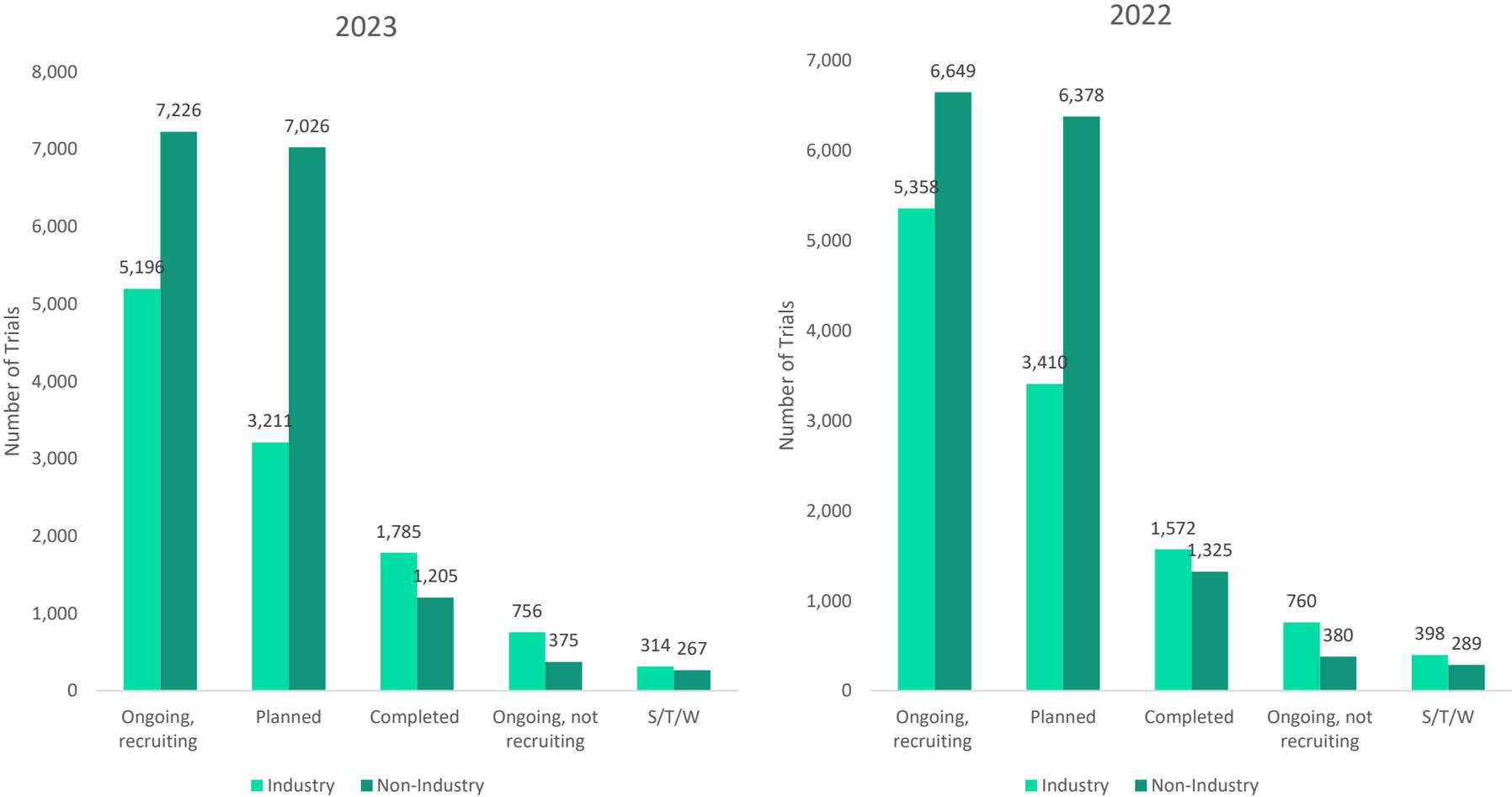
2. Global Clinical Trial Landscape in 2023

Recruiting Trials Dominated in 2023

Clinical trials, by sponsor type, status, and initiation/completion

As of February 20, 2024

- Compared to 2022, the number of ongoing trials was 1.0 times higher, and the number of planned trials was 0.9 times higher. The number of S/T/W trials in 2023 was 0.8 times lower than in 2022. This could be attributed to trials resuming normal practices after the COVID-19 pandemic.

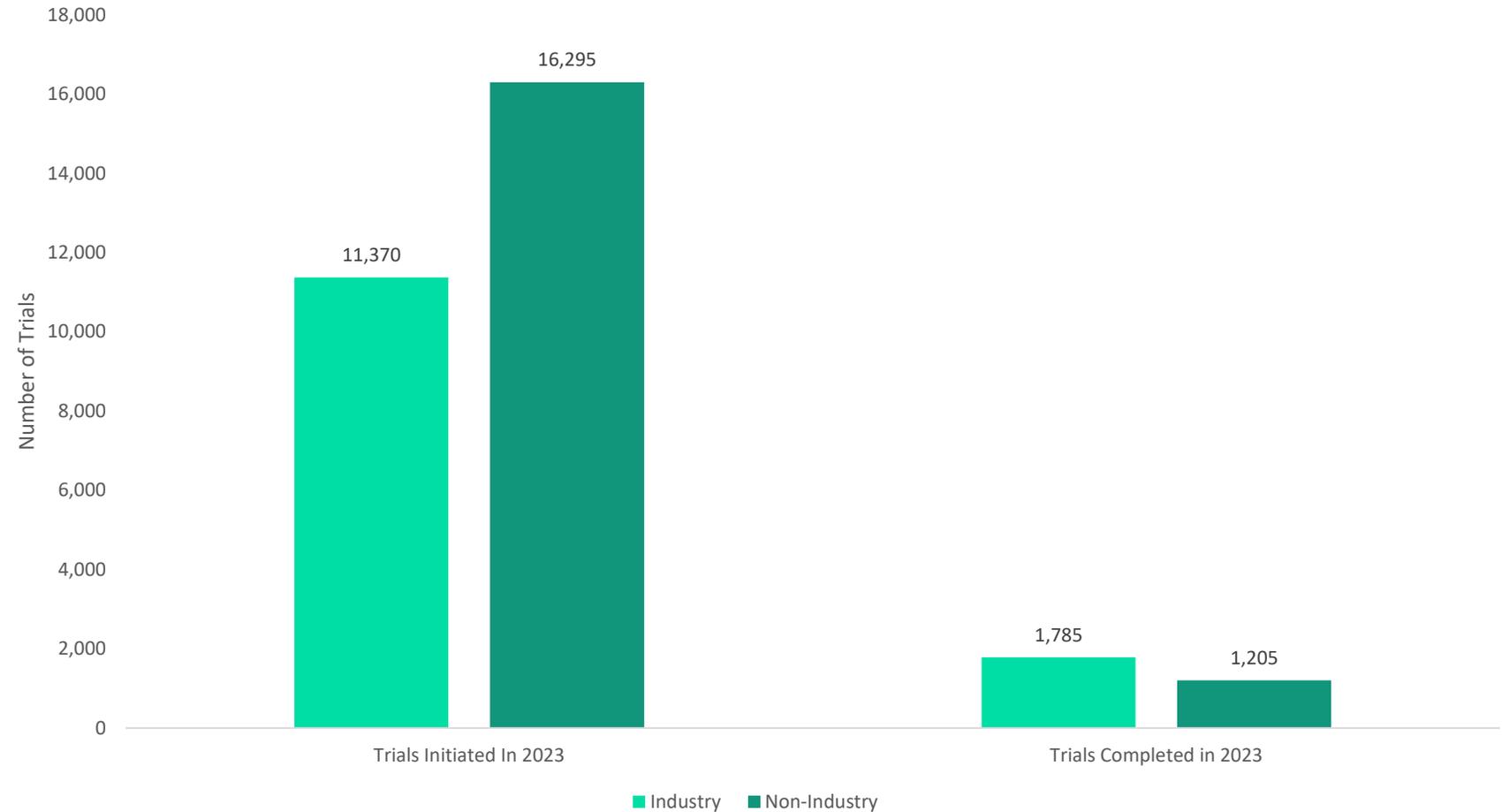


Source: GlobalData Pharma Intelligence Center

Trials Initiated and Completed in 2023

2023 Clinical trials, by initiation/completion

As of February 20, 2024



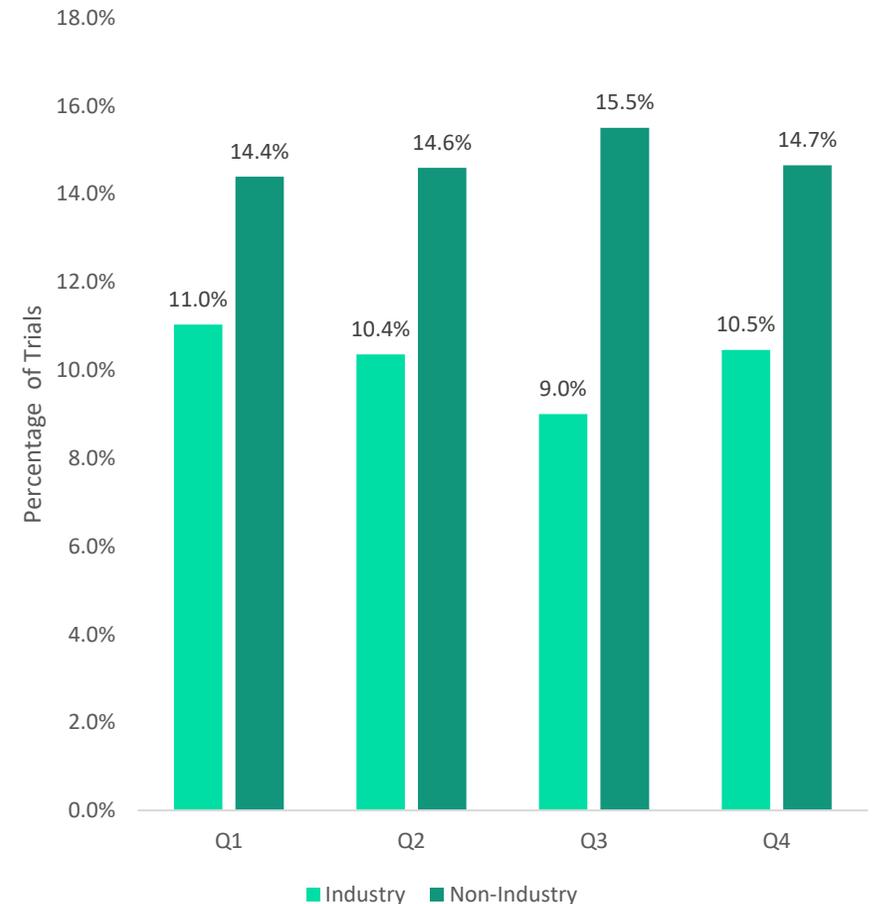
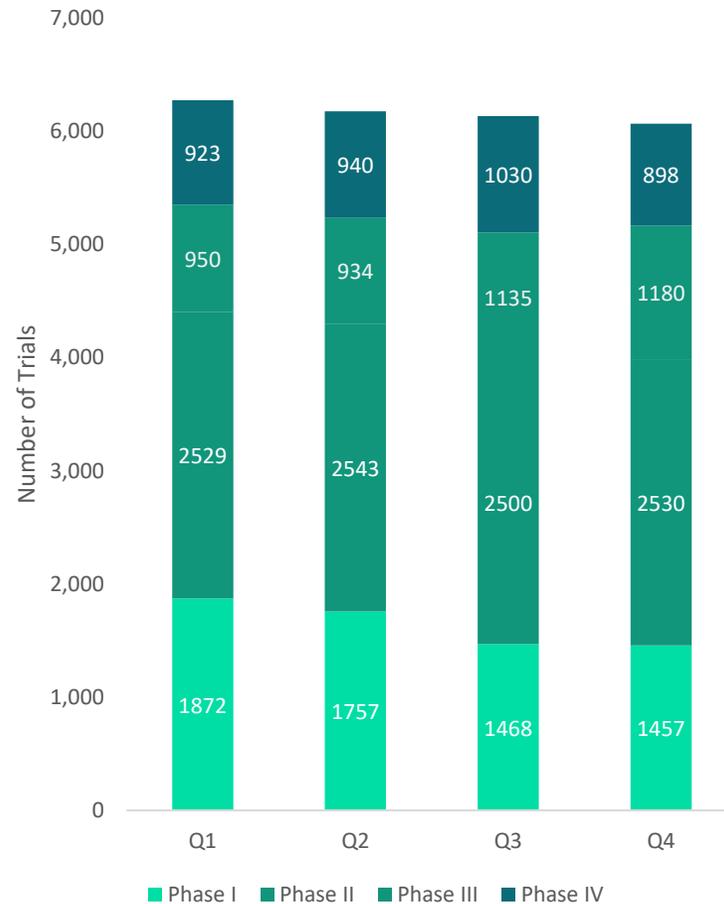
Source: GlobalData Pharma Intelligence Center

- Non-industry sponsors initiated 1.4 times more trials than industry sponsors, similar to 2022. More completed trials had industry sponsors than non-industry sponsors, with a difference of 247 trials. More S/T/W trials had industry sponsors than non-industry sponsors, with a difference of 109 trials.

Q2 Claimed the Highest Number of Trial Starts in 2023

Clinical trials, by phase and sponsor type

As of February 20, 2024



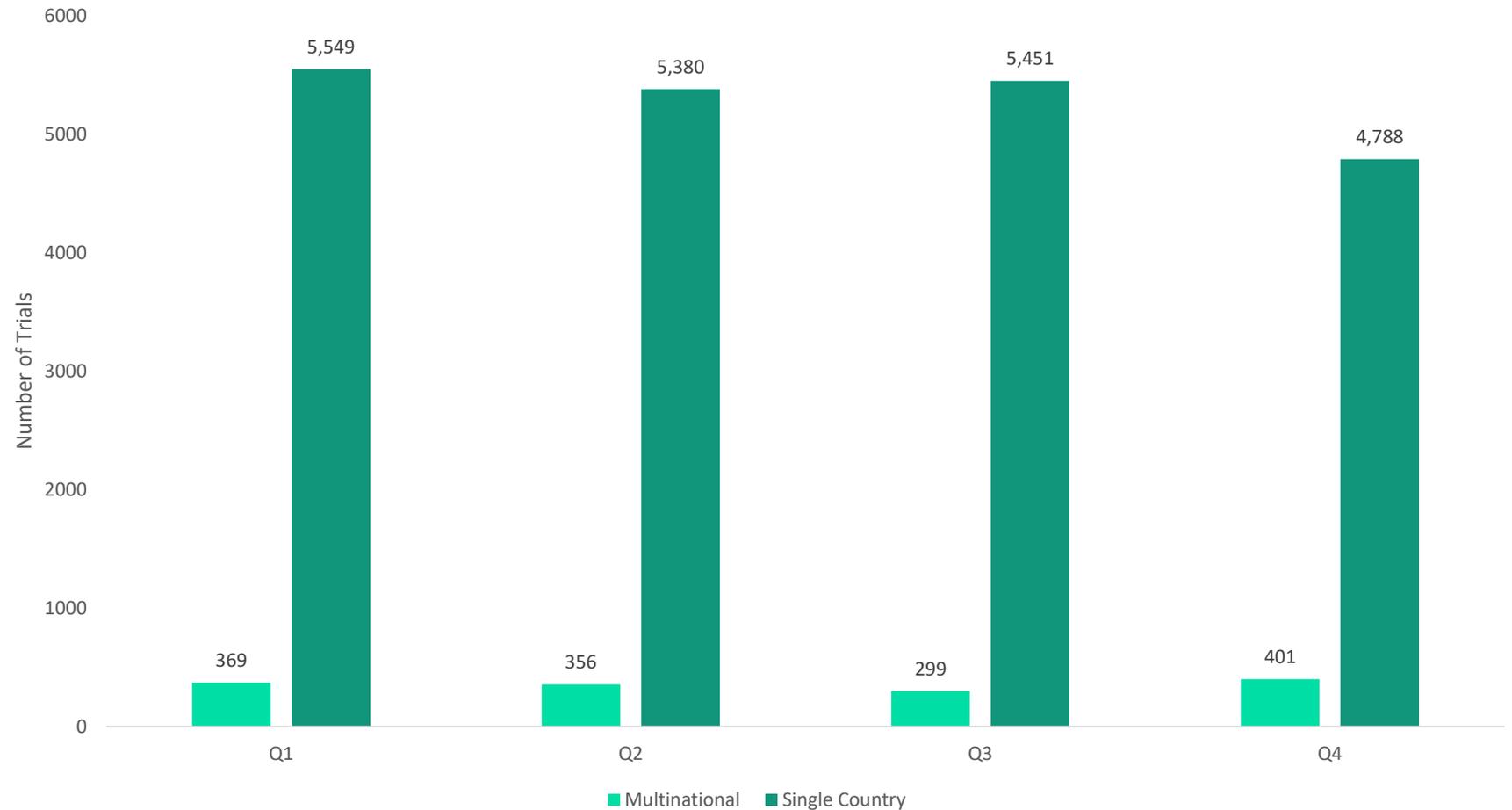
Source: GlobalData Pharma Intelligence Center

- Q2 2023 had the greatest number of trials with 41.0%, followed Q1 2023 with 26.6%.
- Overall, non-industry-sponsored trials outnumbered industry-sponsored trials at 59.1% versus 40.9%, respectively.
- Compared to 2022, where non-industry trials steadily decreased for Q3 and Q4, the number of non-industry and industry-sponsored trials remained nearly level for all quarters.

Single Country Trials Dominated in 2023

Single-country and multinational trials

As of February 20, 2024



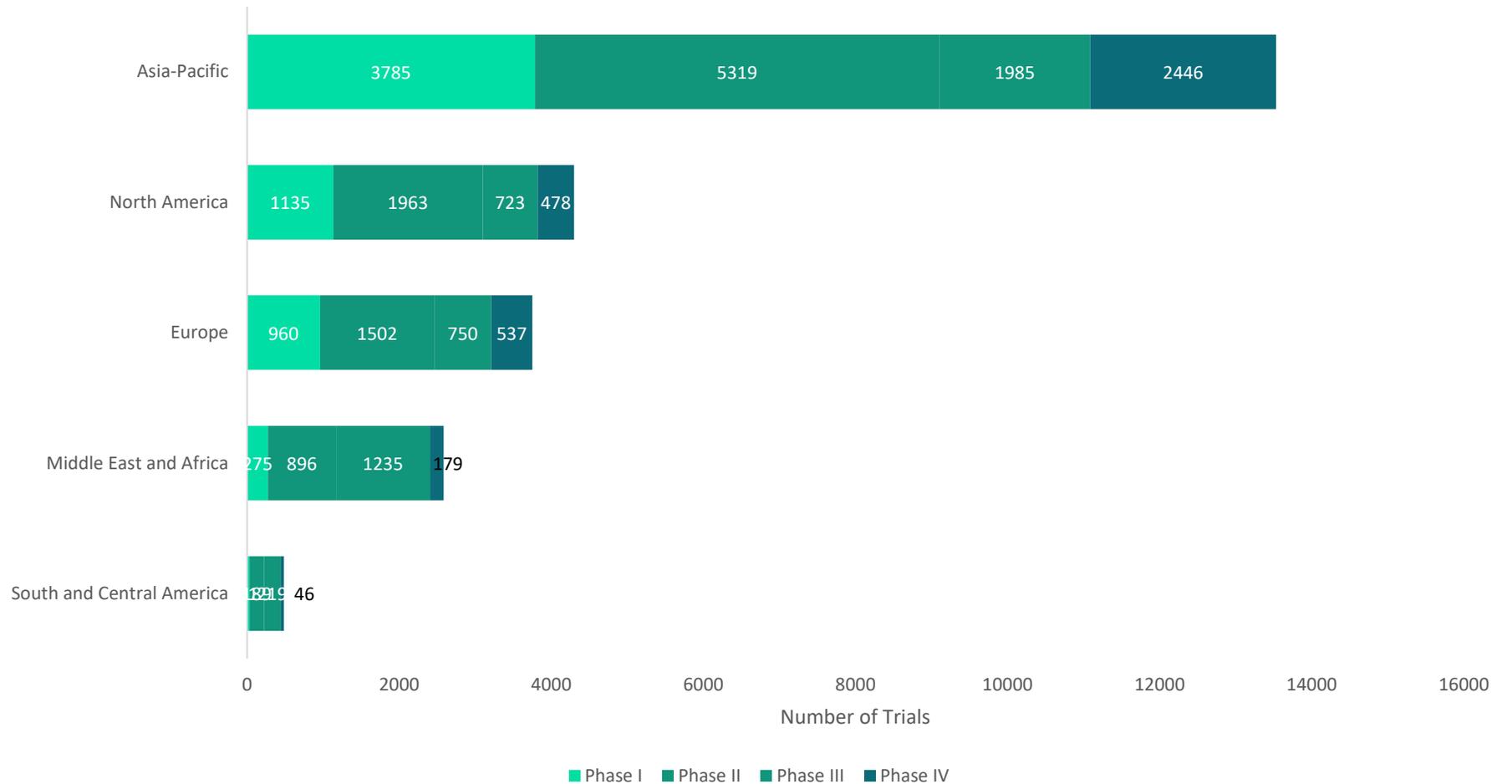
Source: GlobalData Pharma Intelligence Center

- There were 15.0 times as many single-country trials as multinational trials in Q1 2023, 15.1 times more in Q2 2023, 18.2 times more in Q3 2022, and 11.9 times more in Q4 2023.
- Similar to 2022, the value for single-country trials in 2023 remained similar for Q1 and Q2, with a difference of 327 trials. A slight increase in single-country trials occurred for Q3 and Q4.

APAC Led in Overall Trials for 2023

Clinical trials regions, by phase

As of February 20, 2024



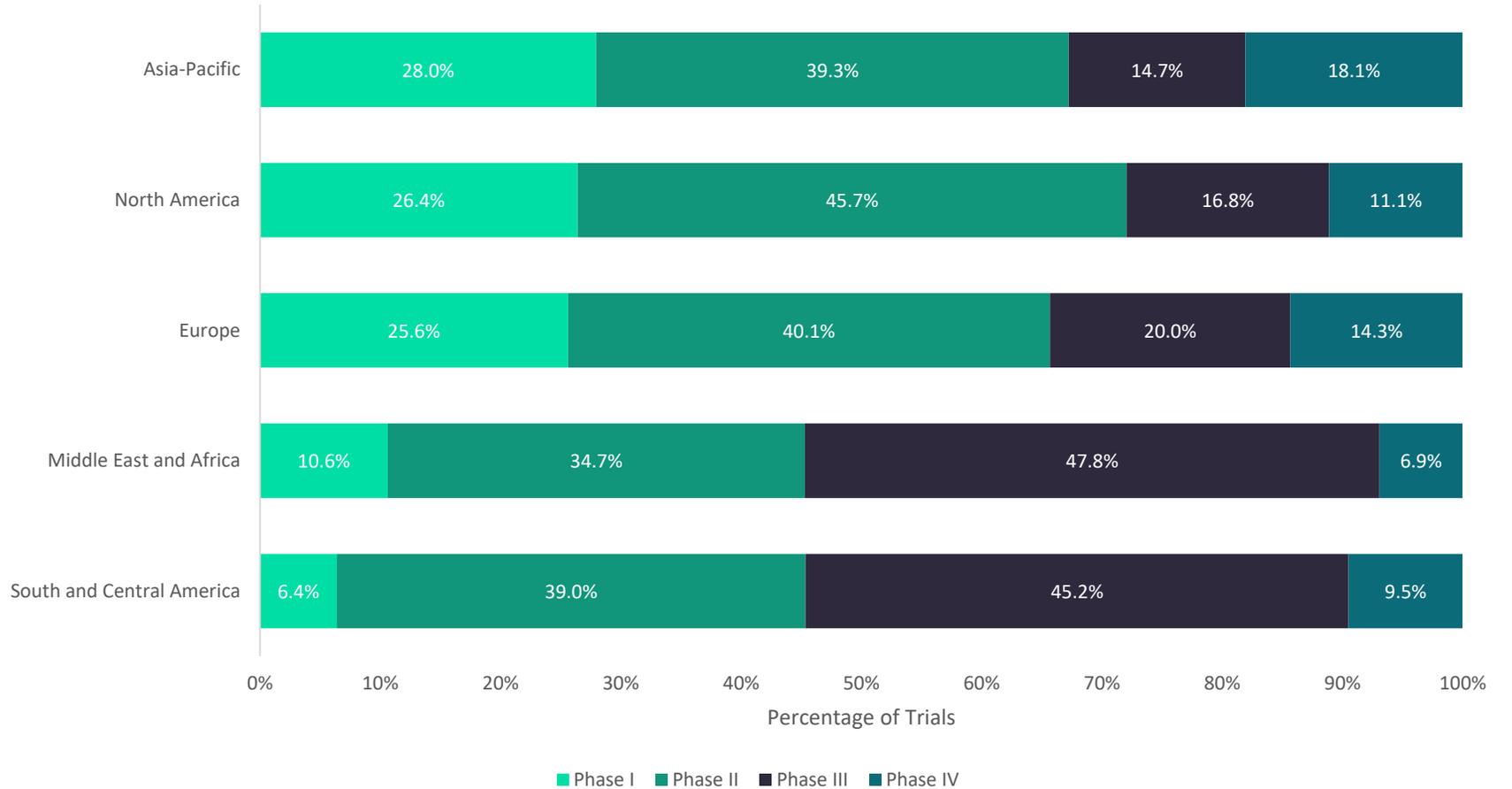
Source: GlobalData Pharma Intelligence Center

- Compared to trials in 2022, clinical trials regions were still in the same order in 2023. However, the trial counts for each region only increased for APAC and Middle East and Africa, while they decreased for other nations. This could be partially due to the high number of COVID-19 trials still ongoing in the APAC region and increased multinational sites in the Middle East and Africa.

APAC Leads in Trials for 2023, with the Majority in Phase II

Clinical trials regions, by phase and distribution

As of February 20, 2024



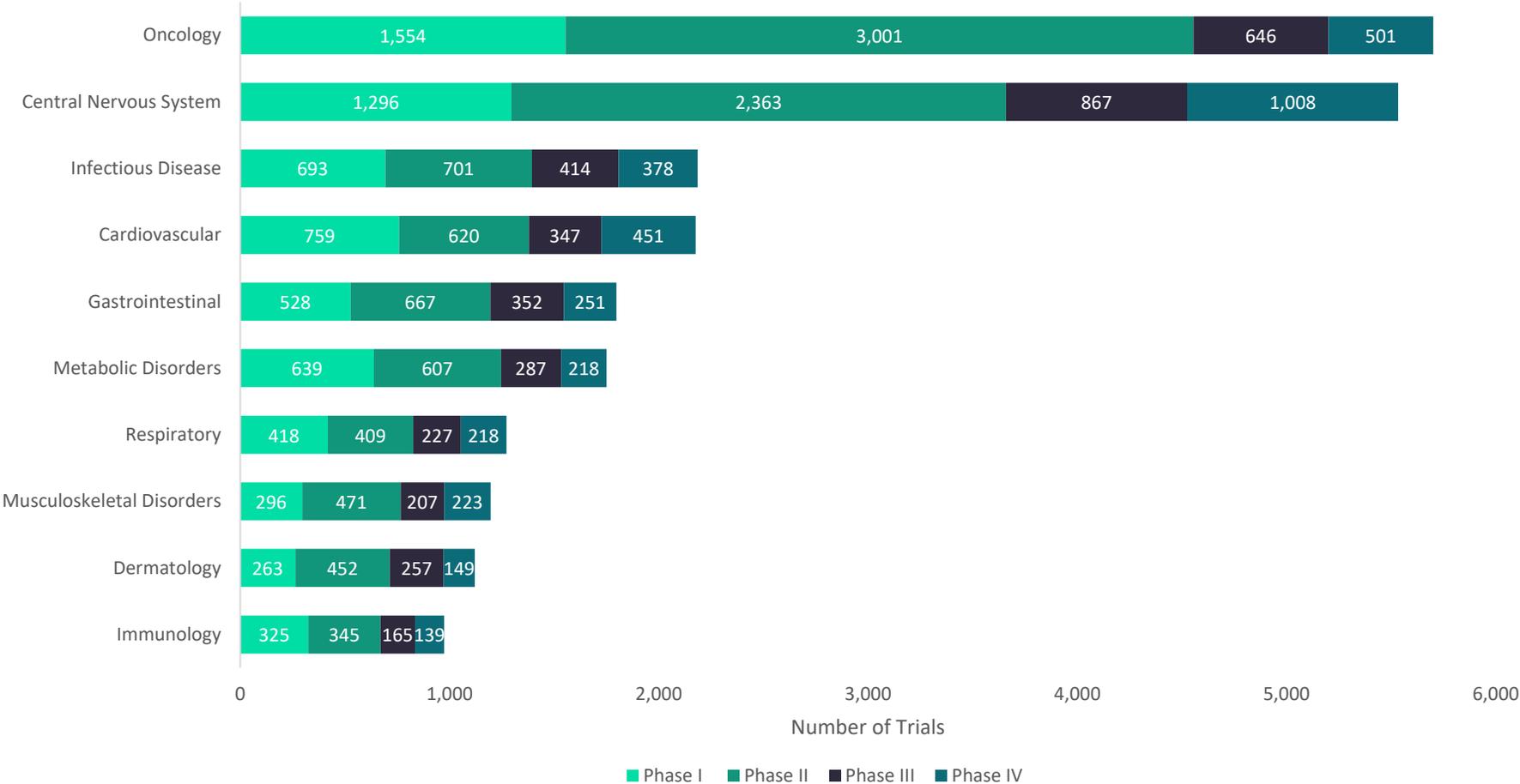
Source: GlobalData Pharma Intelligence Center

- APAC had the greatest proportion of early stage trials (28.0%) within Phase I trials.
- China recorded the highest number of trials in 2023, followed by US, India, Iran and South Korea.

Oncology Leads Trials for 2023

Clinical trials top therapy areas, by phase

As of February 20, 2024



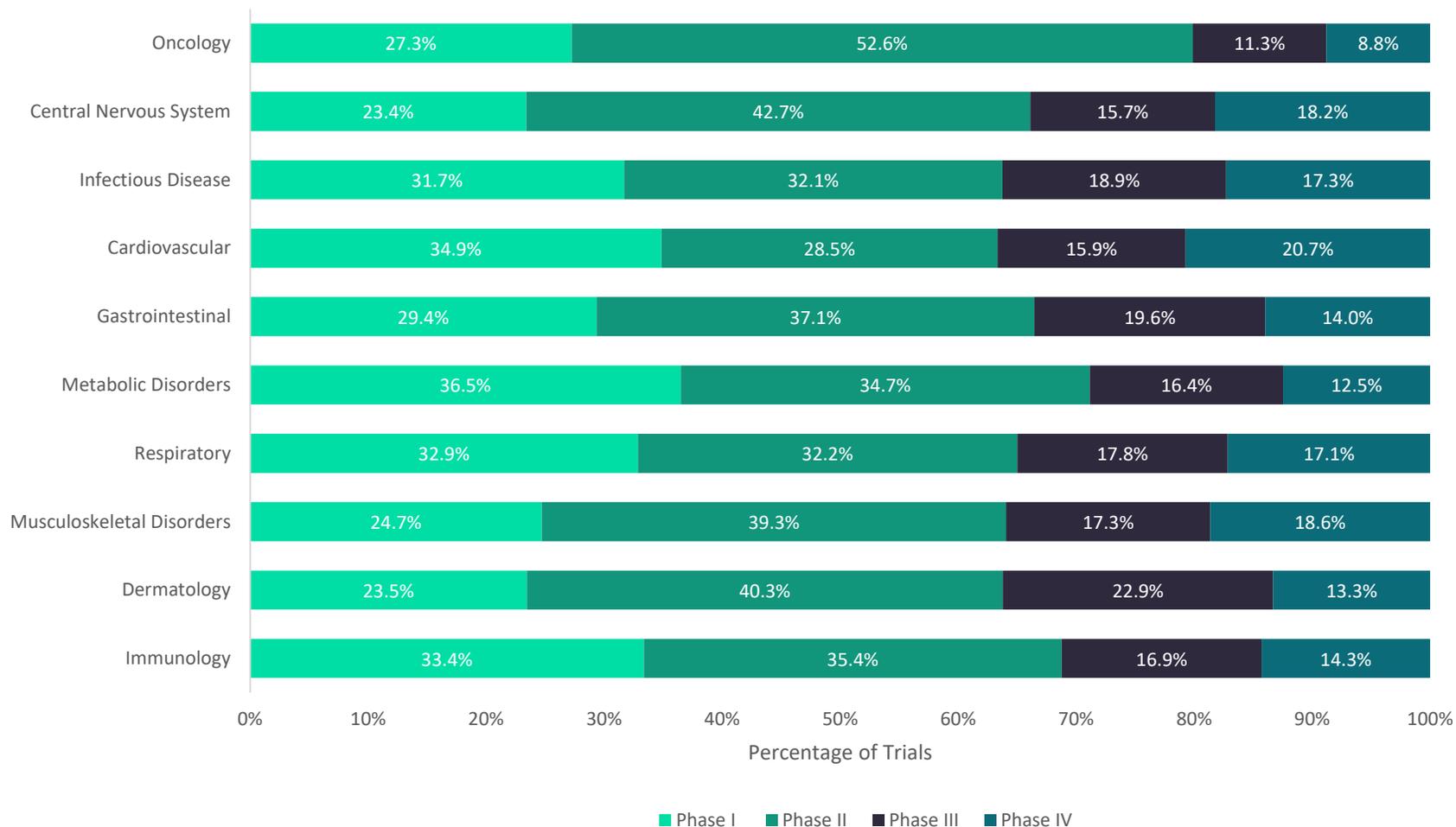
Source: GlobalData Pharma Intelligence Center

- Oncology had the highest number of trials in 2022 with 5,702 trials, followed by central nervous system (5,534 trials) and infectious disease (2,186 trials).
- Oncology had the highest number of clinical trials in Phase I and Phase II, while central nervous system had the most Phase III and IV trials, the same as it was in 2022.

Oncology Leads Trials for 2022 with More Than 52% of Trials in Phase II

Clinical trials top therapy areas, by phase and distribution

As of February 20, 2024



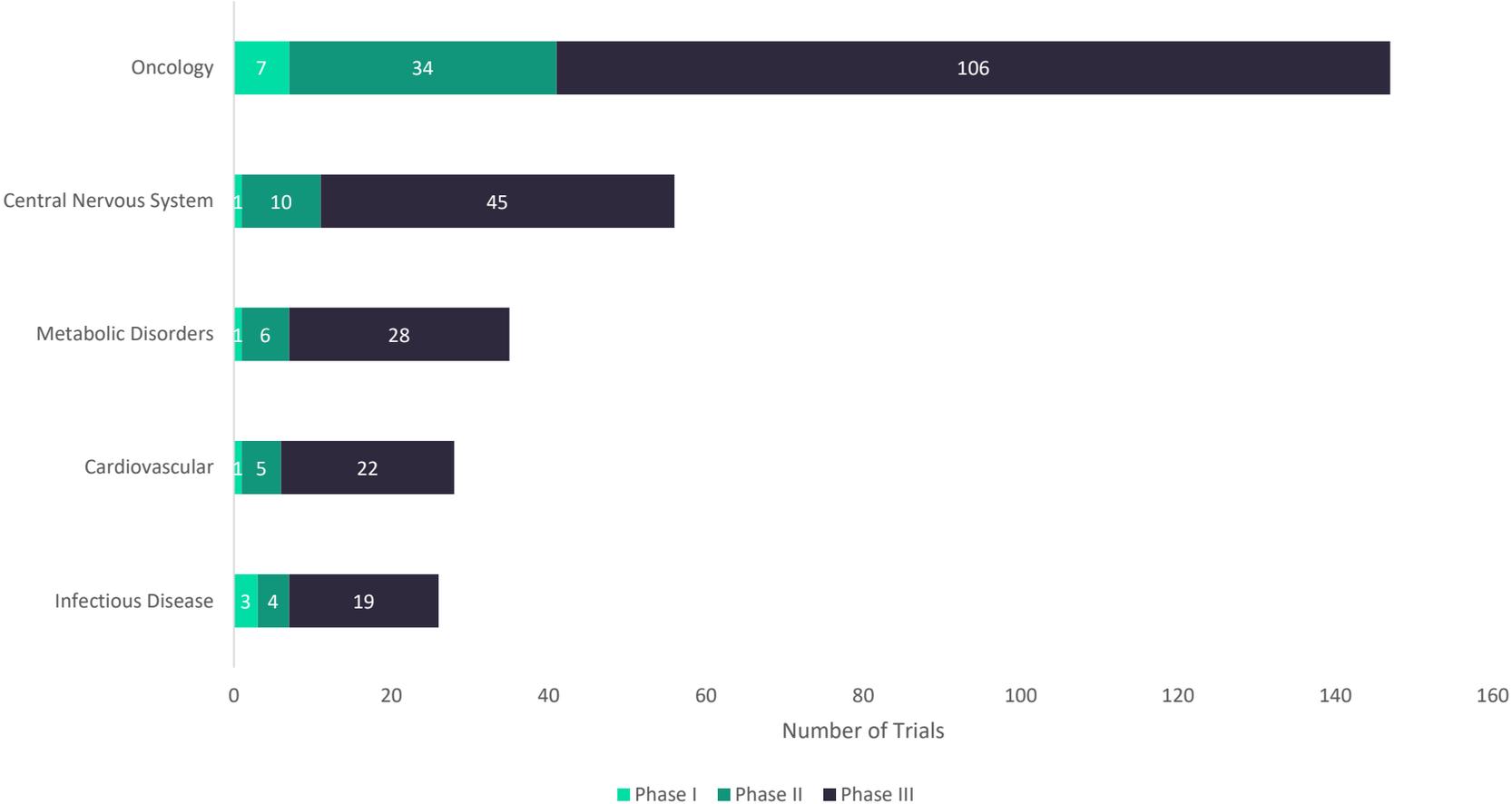
Source: GlobalData Pharma Intelligence Center

- Although oncology had the highest number of trials within Phase I, metabolic disorders had the largest proportion of Phase I trials with 36.5%, followed by cardiovascular (34.9%) and immunology (33.4%).
- Oncology had the greatest proportion of Phase II trials, with 52.6% of the total trials, representing a slight increase from 2022. This could be due to more oncology drugs being approved once in Phase II, possibly because the trials landscape is returning to normal after the COVID-19 pandemic.

Oncology Leads in Pivotal/Registration Trials for 2023

Pivotal/registration clinical trials top therapy areas, by phase

As of February 20, 2024



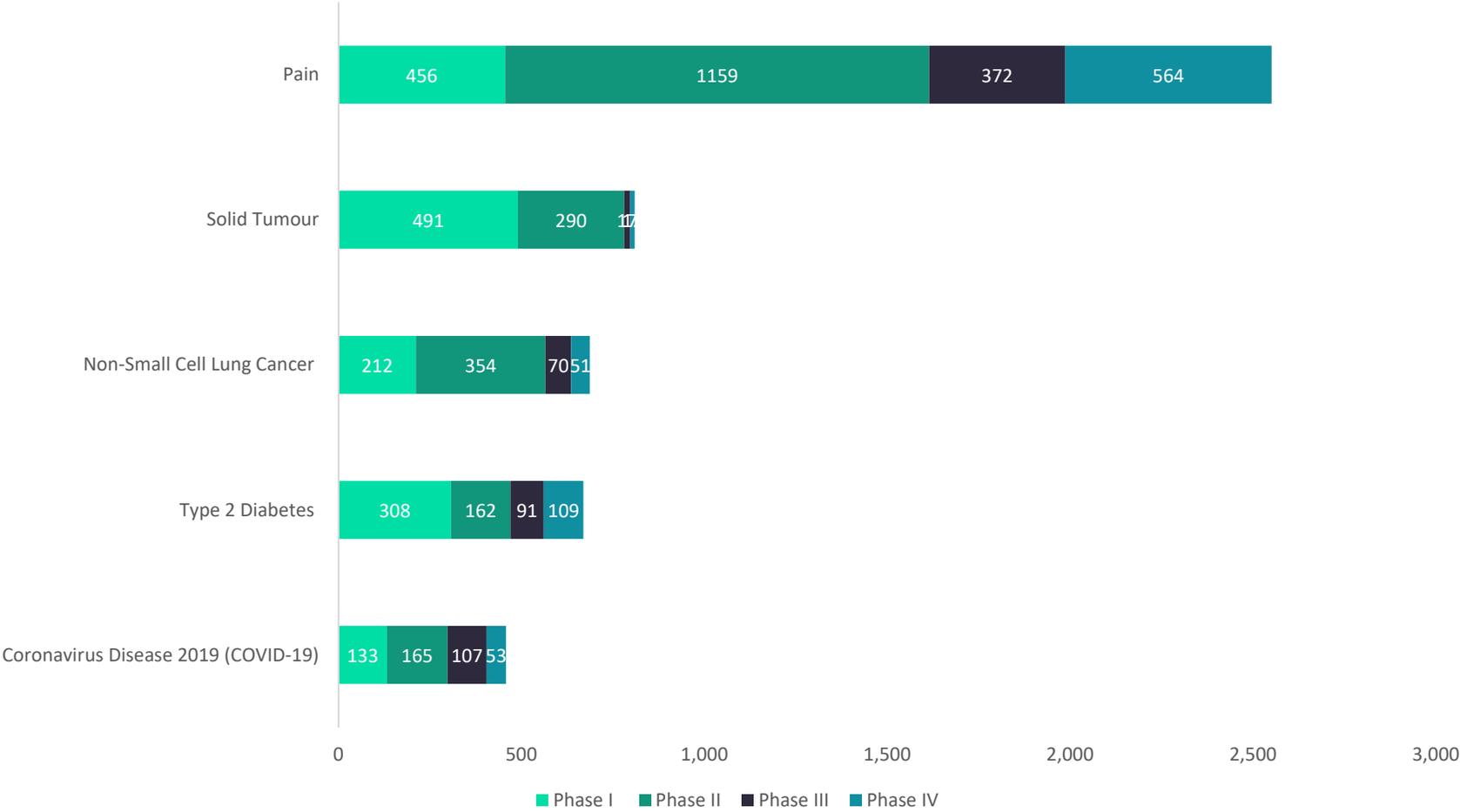
Source: GlobalData Pharma Intelligence Center

- Oncology had the highest number of pivotal/registration trials in 2023, with 147 trials, followed by central nervous system (56 trials) and metabolic disorders (35 trials).
- Oncology had the highest number of clinical trials across all three phases.
- As for indication, non-small cell lung cancer was the lead indication for pivotal/registration trials.

Pain Is the Top Indication for Trials in 2023

Clinical trials top indications, by phase

As of February 20, 2024



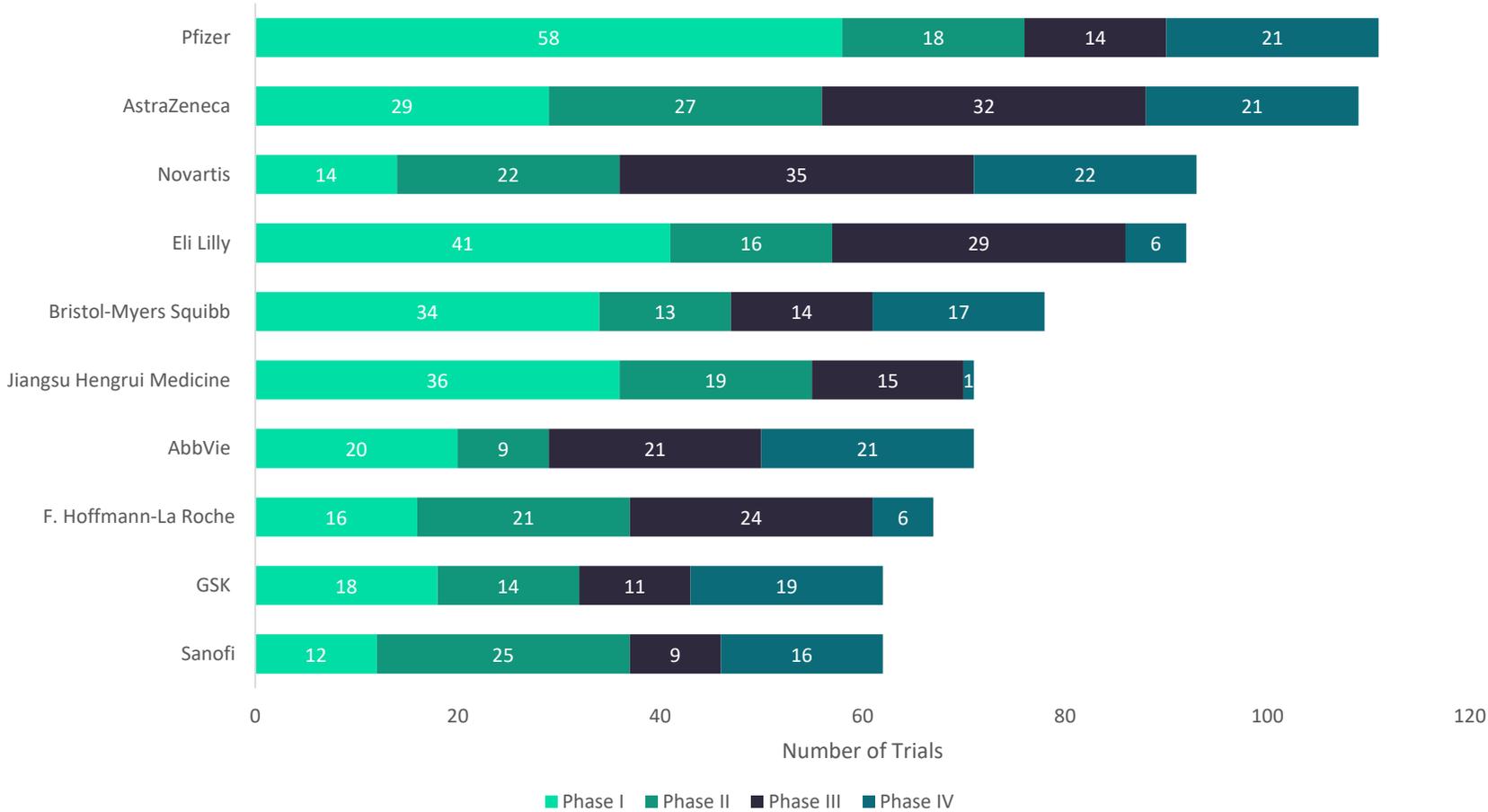
Source: GlobalData Pharma Intelligence Center

- Solid tumors had the highest number of Phase I trials at 491 trials. Many sub-indications fall under the category of solid tumors.
- Compared to trials in 2022, non-small cell lung cancer moved from fifth place to third place with 687 trials. Type 2 diabetes was placed fourth in the top five indications for 2023, with 670 trials.

Pfizer Leads in Industry-Sponsored Trials

Clinical trials top industry sponsors, by phase

As of February 20, 2024



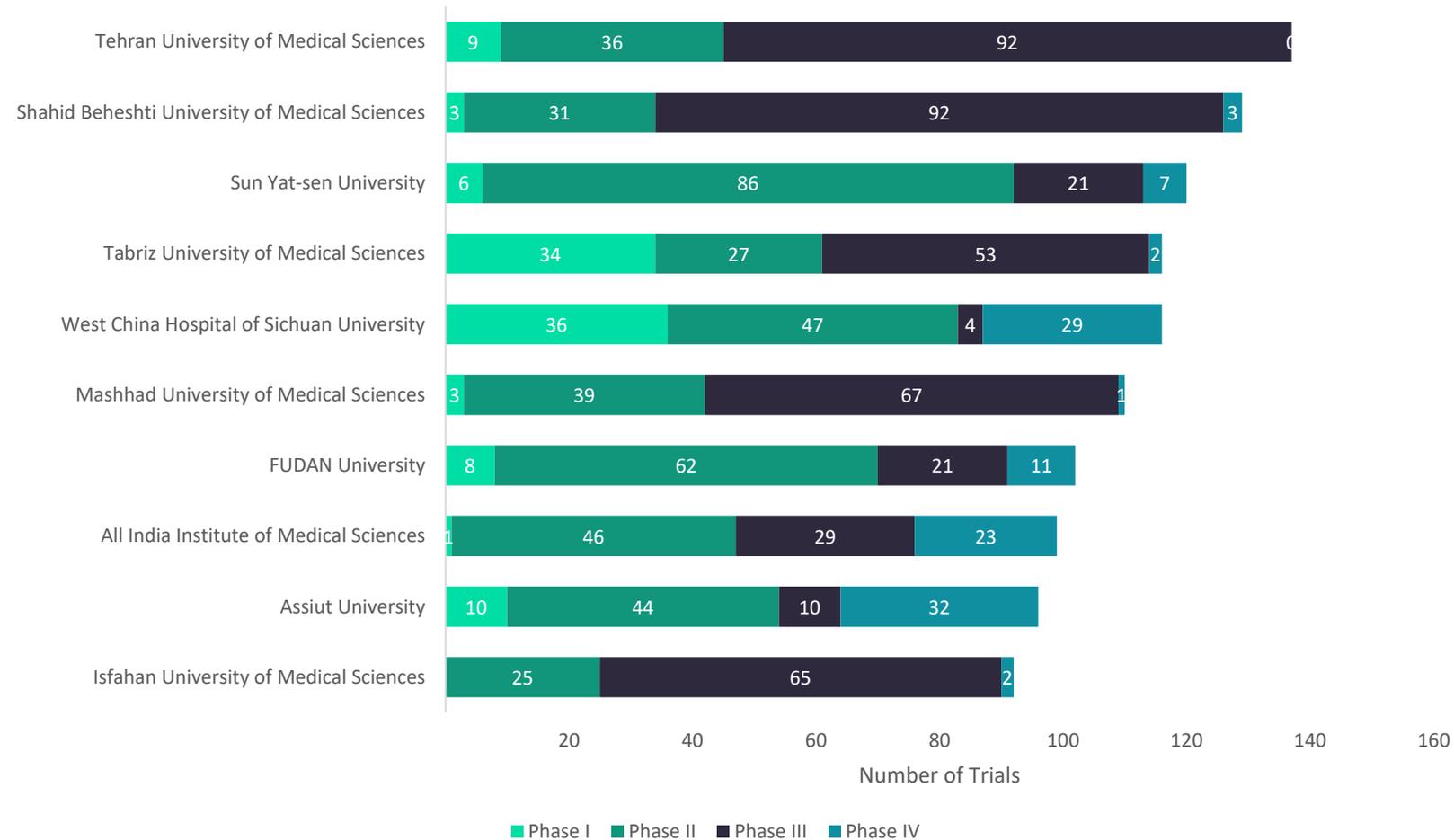
Source: GlobalData Pharma Intelligence Center

- Within industry-sponsored trials, Pfizer leads the clinical trial count with 111 trials, followed by AstraZeneca with 109 trials and Novartis with 93 trials. AstraZeneca was also in the top three industry sponsors by trial count for 2020, 2021, 2022, and 2023.
- The industry sponsor that did not feature in the top 10 in 2022 but did in 2023 was AbbVie.
- Pfizer had the most Phase I trials with 58 trials, most of which are focused on oncology.

Tehran University of Medical Sciences Leads in Non-Industry Sponsored Trials

Clinical trials top non-industry sponsors, by phase

As of February 20, 2024



Source: GlobalData Pharma Intelligence Center

- Tehran University of Medical Sciences had the largest number of clinical trials in 2023, with 137 trials.
- Most of these universities are primarily focusing on oncology and the central nervous system.
- West China Hospital of Sichuan University had the largest number of trials in Phase I with 36 trials. These were for a variety of indications.

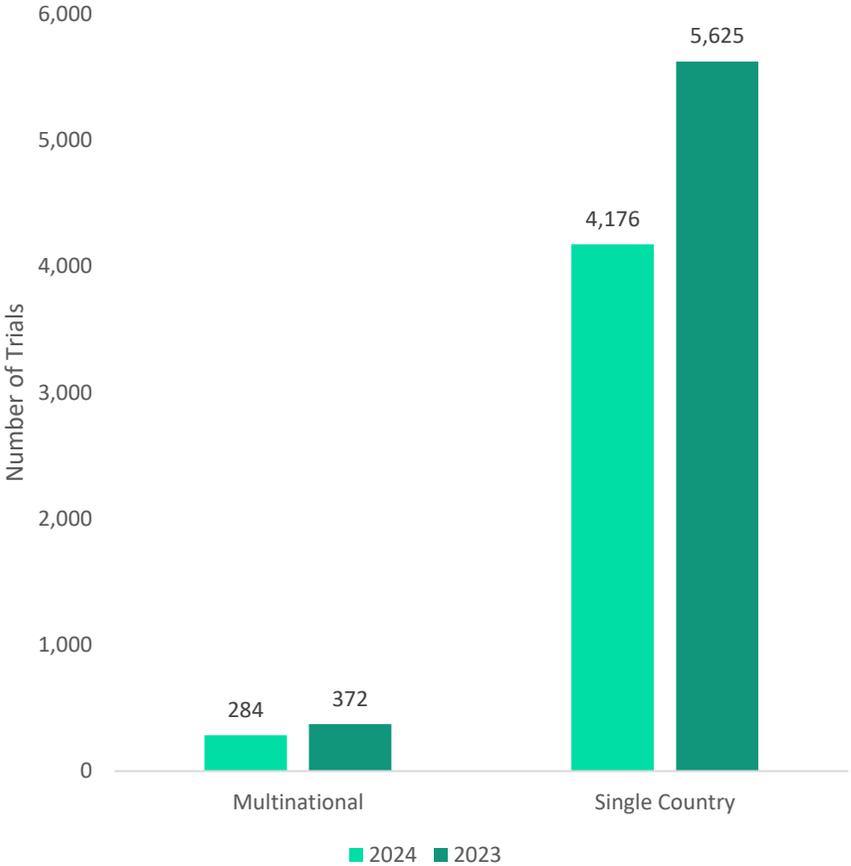
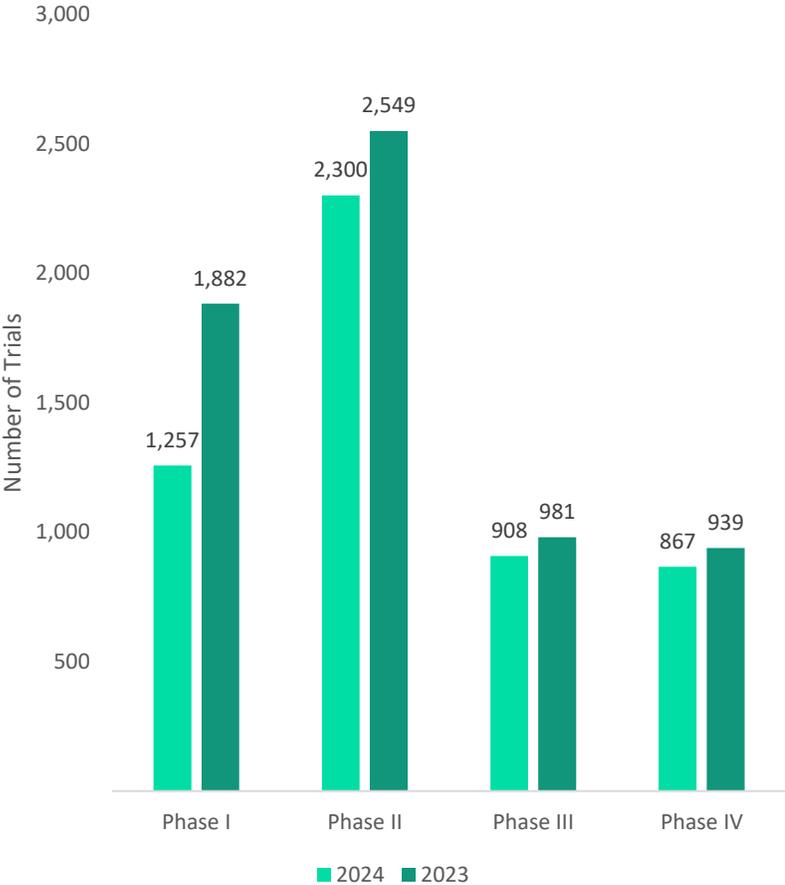
The background features a dark blue gradient with several large, overlapping, textured shapes in a teal color. These shapes resemble crumpled paper or organic, porous structures. A white rectangular box is positioned in the lower-left quadrant, containing the text.

2. Trends in Q1 2024

Q1 2024 Has Less Trials than in 2023

Q1 clinical trials by phase (2023-2024)

As of April 1, 2024



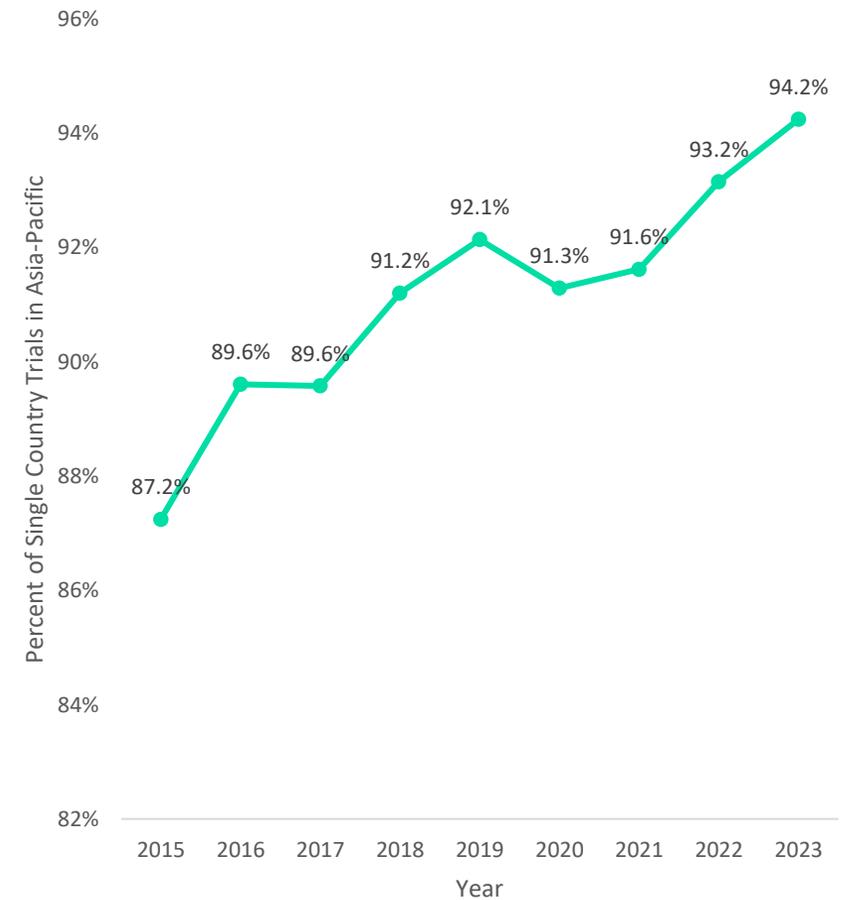
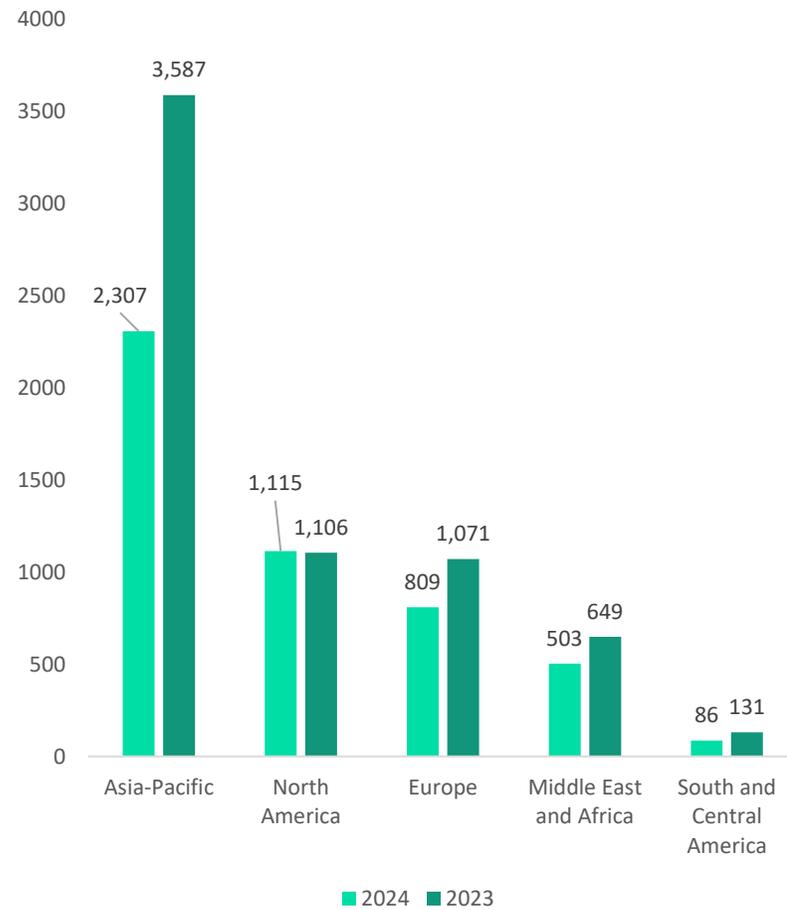
Source: GlobalData Pharma Intelligence Center

- In comparison to Q1 2023, Q1 2024 has less trials in all phases, with the biggest difference in Phase I.
- This is expected due to a trend noticed during US election years. There was far less trials during those years than any other year.

APAC Continues to Have Most Trials into 2024

Q1 clinical trials by region (2023-2024)

As of April 1, 2024



Source: GlobalData Pharma Intelligence Center

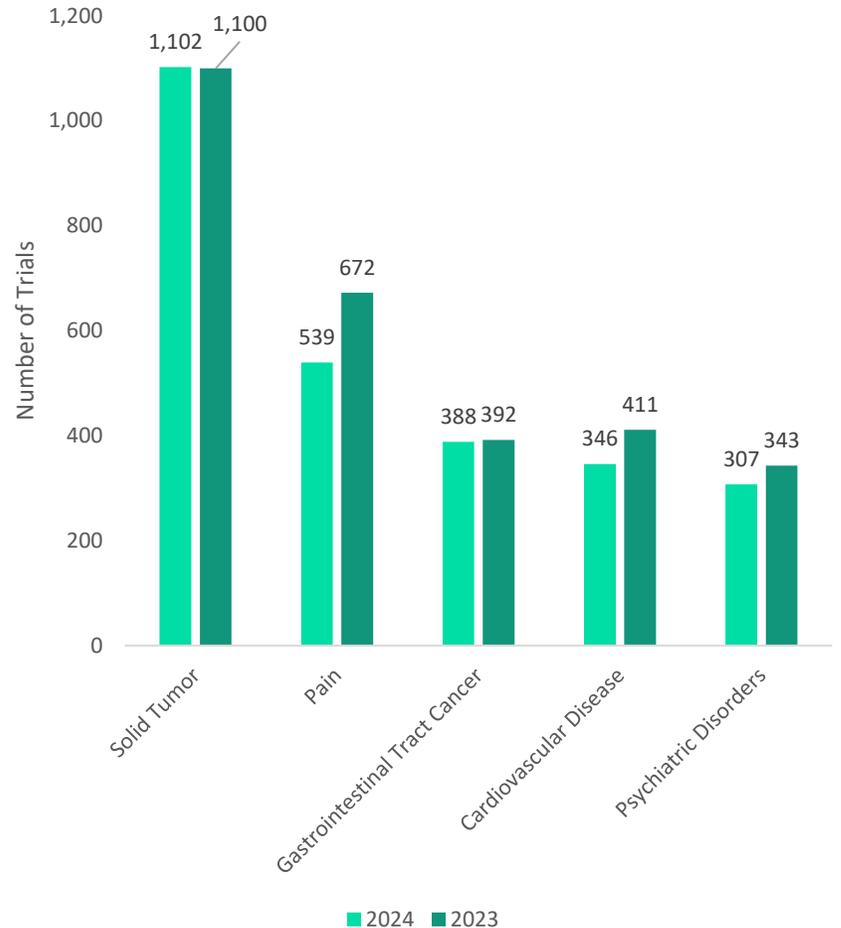
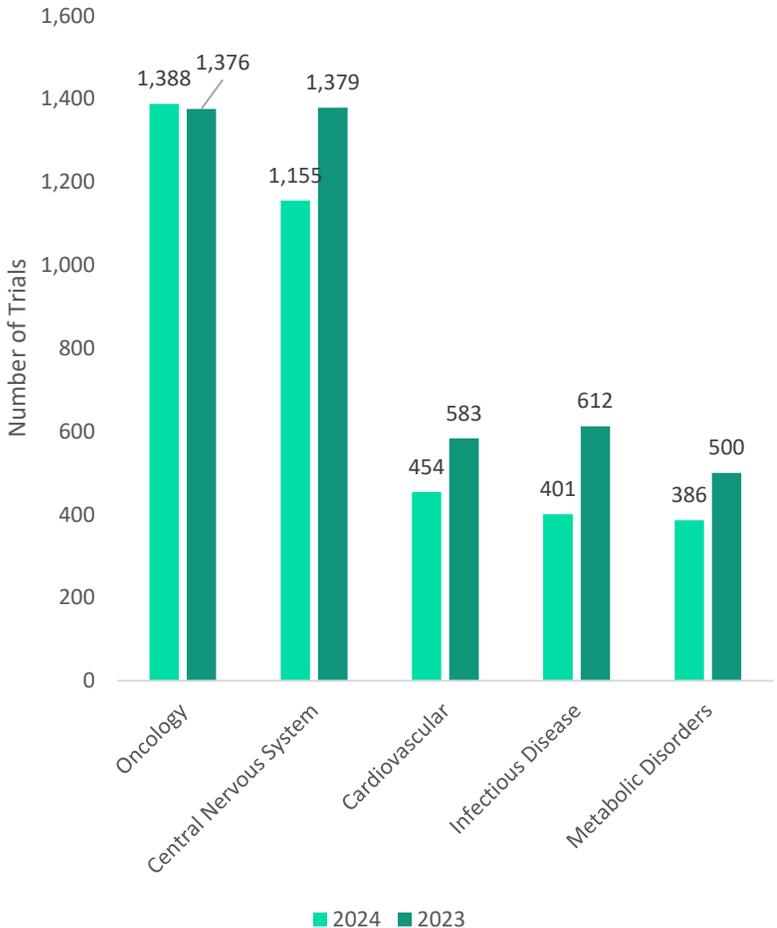
- Asia-Pacific continues to have the most trials into Q1 2024.
- Reasons for the steady dominance includes majority of their trials are domestic trials.
- The number of single country trials for Asia-Pacific has overall increased since 2015 with the most in 2023 (94.2%).

Oncology & Solid Tumor Leads Trials in Q1

Q1 clinical trials by therapy area & indication (2023-2024)

As of April 1, 2024

- Oncology continues to have the highest number of trials in Q1, the same exact amount seen in 2023.
- On the indication level, solid tumors has been and continues to be on top for both 2023 and 2024.

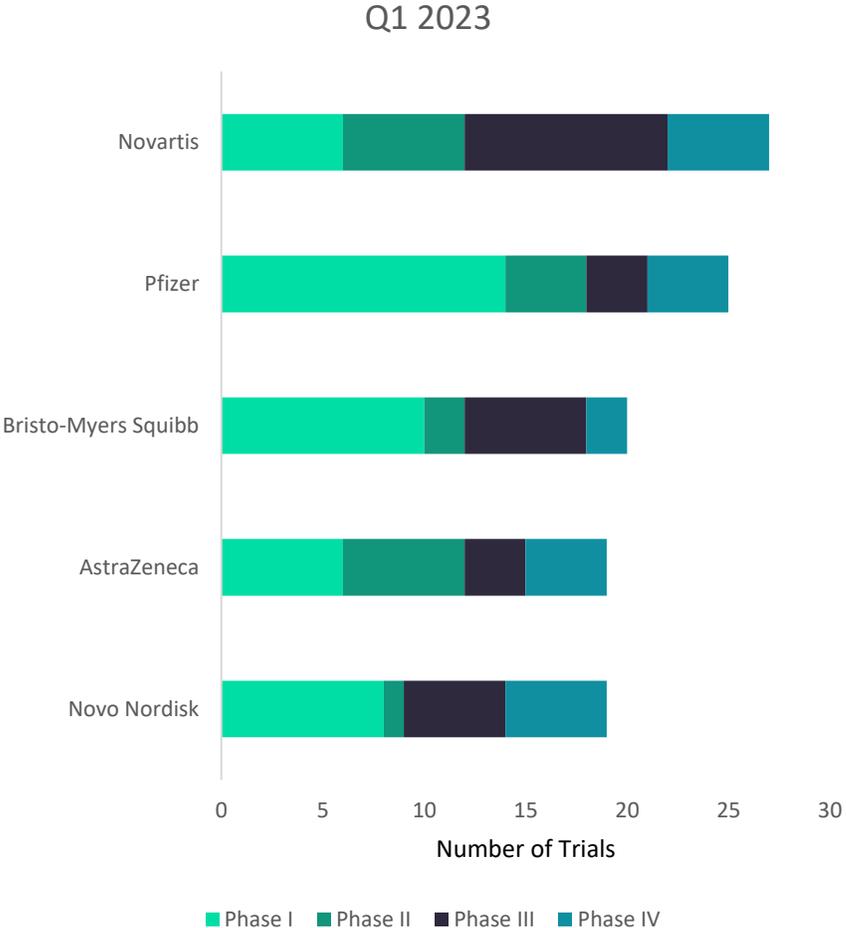
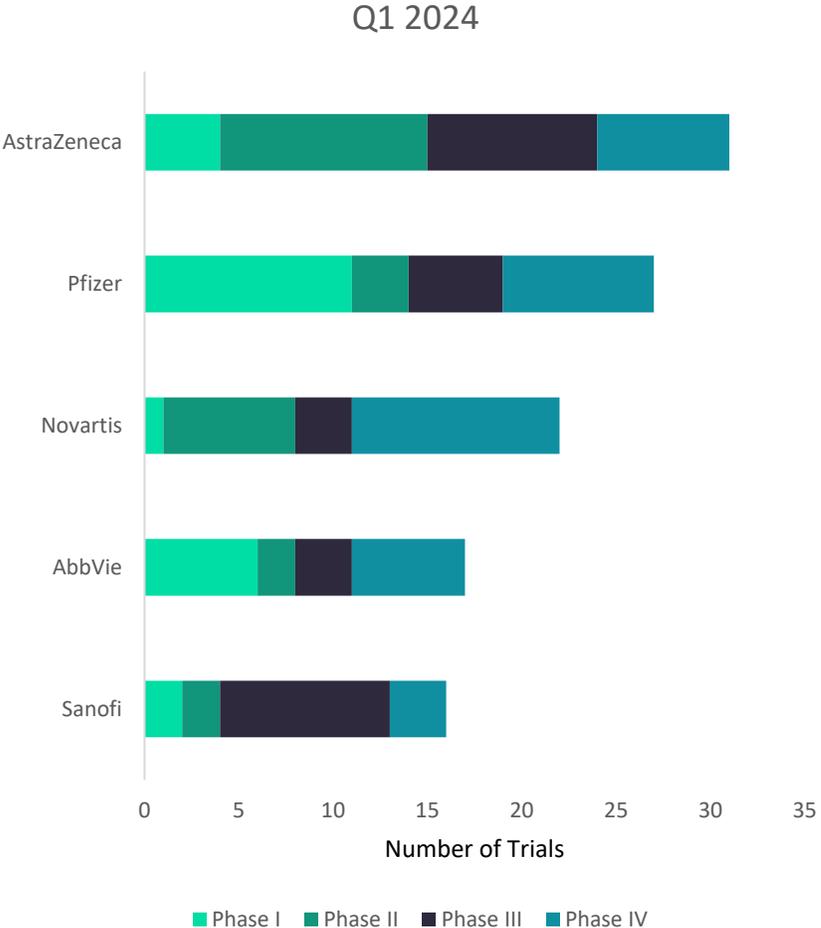


Source: GlobalData Pharma Intelligence Center

Different Industry Sponsor For Q1 2024

Clinical trials top industry sponsors by phase (2023-2024)

As of April 1, 2024



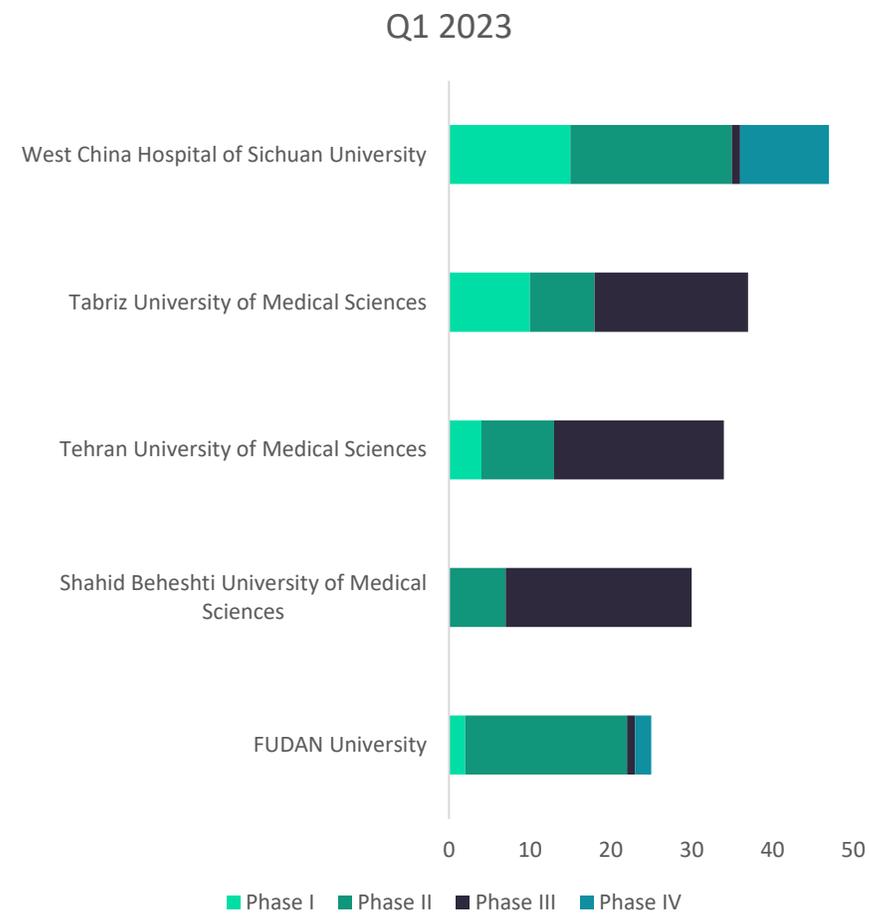
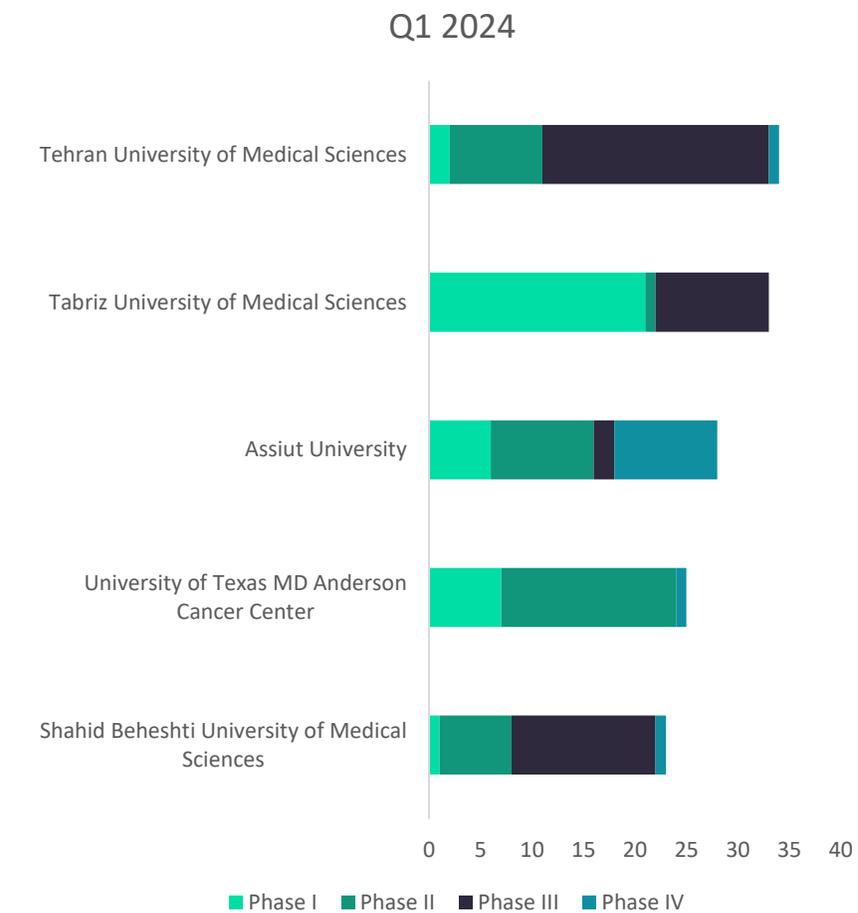
Source: GlobalData Pharma Intelligence Center

- Within industry sponsored trials, AstraZeneca top the clinical trial count for Q1 2024 while Novartis had the most in Q1 2023.
- AstraZeneca has the most Phase II trials, with 64% of them focused on solid tumors.
- Although there are slight changes in the top five industry sponsors from Q1 2023 to Q1 2024, Pfizer continues to have the second most trials.
- They currently have the most Phase I trials but have decreased their total amount of early-stage trials by 27.8% and increased later stage trials by 85.7%.

Tehran University of Medical Sciences Leads Non-Industry Sponsors in early 2024

Clinical trials top non-industry sponsors by phase (2023-2024)

As of April 1, 2024



Source: GlobalData Pharma Intelligence Center

- Tehran University of Medical Sciences has the larger number of clinical trials for early 2024. They had the third most trials for non-industry sponsor last year in Q1 2023.
- Tehran University of Medical Sciences has the most Phase III trials, mostly focused on female infertility, pain and psychiatric disorders, unlike AstraZeneca, the top industry sponsor, who is currently focusing on solid tumors.
- Tabriz University of Medical Sciences currently has the most Phase I trials in 2024, most for pain and arthritis, compared to more Phase III trials in 2023 (cardiovascular disease).



4. Key Takeaways

Key Takeaways



Clinical Trial Landscape in 2023

- Trials in 2023 were mostly conducted by non-industry sponsors and led by institutions.
- Oncology was the top therapy area for trials and solid tumors for indication.
- Single country trials dominated trials in 2023.

Clinical Trial Landscape in Q1 2024

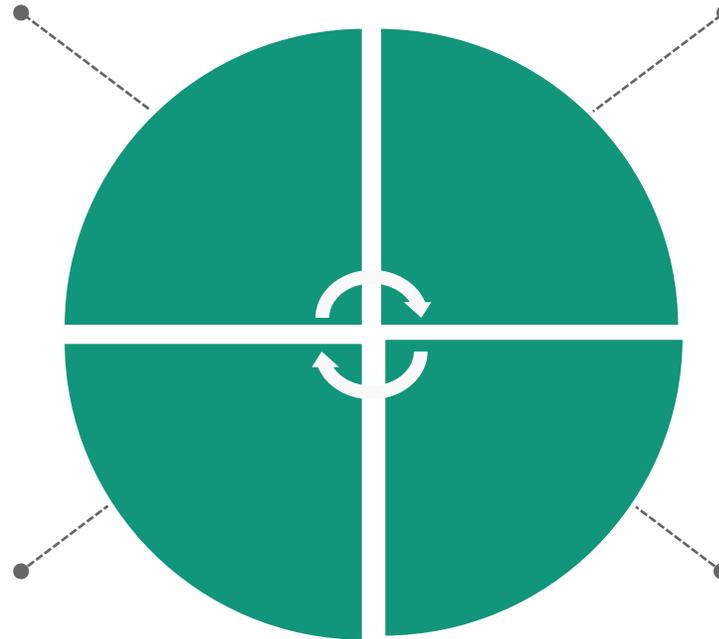
- Q1 2024 has less trials in all phases compared to Q1 2023. Biggest difference is seen in Phase I.
- Less trials so far in 2024 may be due it being a US presidential election year.
- Oncology and solid tumors continue to be the top therapy area and indication.

Top Sponsors

- Q1 2024 saw different top industry and non-industry sponsors compared to Q1 2023.
 - Currently, AstraZeneca and Tehran University of Medical Sciences are the top sponsors.
- Pfizer stays consistent in its position of number of trials sponsored.

Geographic Distribution

- Asia-Pacific has the most trials in 2024, a continuation of its dominance from 2023.
- This region increases the number of single country trials each year, with 2023 having the most (94.2% of all APAC trials)
- It is expected that this trend will continue for all of 2024.



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