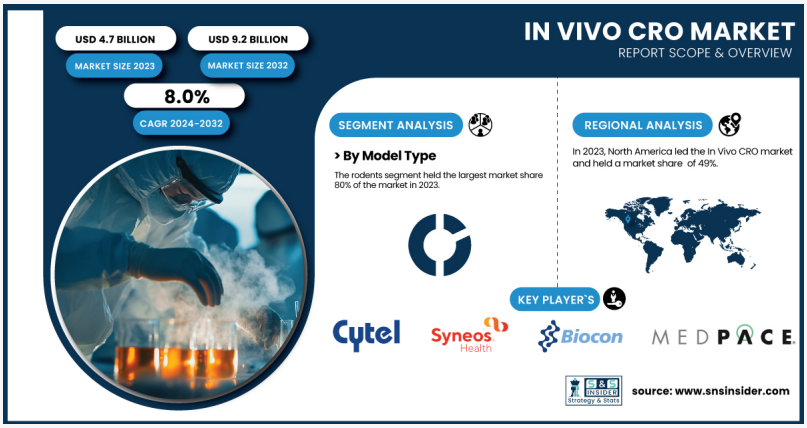
In Vivo CRO Market to Hit USD 9.2 Billion by 2032, Growing at 8% CAGR | SNS Insider

Increasing Demand for Preclinical Research and Technological Advancements in Drug Development Fuel Growth.



In Vivo CRO

AUSTIN, TX, UNITED STATES, March 3, 2025 /EINPresswire.com/ -- According to Research by SNS Insider, The In Vivo Contract Research Organization (CRO) market is anticipated to grow at a significant rate during the forecast period owing to the growth in demand for preclinical research, drug development advancements, and the growing prevalence of chronic diseases.

The global In Vivo CRO Market size was estimated at USD 4.7 billion in 2023 and is projected to reach USD 9.2 billion by 2032, expanding at a CAGR of 8% from 2024 to 2032.

Market Drivers

The increasing incidence of chronic diseases like cancer, cardiovascular diseases, and neurological disorders has considerably augmented the demand for drug development and preclinical testing. With their ability to inform on the safety and efficacy of new drug candidates, in vivo CROs are also an essential part of the longer attended process of drug development. Also, advancements in genetic engineering techniques and the creation of sophisticated animal models have improved the precision and reliability of preclinical research, further fuelling market growth. The expansion of in vivo CRO also results from government initiatives and funding for research and development (R&D). As an example, the U.S. National Institutes of Health (NIH) budgeted USD 47.5 billion in 2023 for medical research, and a sizable portion of this would be spent on preclinical studies. Likewise, the European Union's Horizon Europe program has earmarked significant dollars to bolster innovative drug development and preclinical research.

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Key Players in In Vivo CRO Market

- Cytel (East Horizon, Enforesys)
- Syneos Health (Clinical Trial Services, Commercial Services)
- ICON plc (Clinical Development Services, Commercialization Services)
- Biocon (INSUGEN, BASALOG)
- Medpace (Full-Service Clinical Trial Management, Central Laboratory Services)
- Crown Bioscience International (PDX Models, In Vivo Pharmacology Services)
- Charles River Laboratories (In Vivo Toxicology, Discovery Services)
- Labcorp Drug Development (Preclinical In Vivo Studies, Clinical Trial Management)
- WuXi AppTec (In Vivo Pharmacokinetics, Toxicology Services)
- PRA Health Sciences (Clinical Research Services, Data Solutions)
- Parexel International (Clinical Trial Management, Regulatory Consulting)
- Covance (Nonclinical Safety Assessment, Clinical Development)
- Envigo (In Vivo Pharmacology, Toxicology Testing)
- Pharmaron (In Vivo DMPK Studies, Safety Assessment)
- Frontage Laboratories (In Vivo Bioanalytical Services, Preclinical Studies)
- Eurofins Scientific (In Vivo Toxicology, Pharmacokinetics)
- MPI Research (In Vivo Safety Studies, Efficacy Testing)
- QuintilesIMS (Clinical Trial Services, Real-World Evidence Solutions)
- PPD (Pharmaceutical Product Development) (In Vivo Pharmacology, Clinical Development)
- BASi (Bioanalytical Systems Inc.) (In Vivo Toxicology, Pharmacology Services)

Market Segmentation

By Model Type

In 2023, Rodents segment held the largest share of 80% of the market. This growth is driven by preclinical experiments on mice/rat are a common practice due to their relative genetic similarity with humans, characteristics of short reproduction cycle, and being economical. The utility of mice in studying complex diseases like cancer, diabetes, and neurodegenerative disorders has been improved by the introduction of genetically modified rodent models. These models allow researchers to accurately recreate human disease states, and have thus become integral to drug discovery and development.

By Indication

The oncology indication segment led the 2023, accounting for 28% of revenue. The growing burden of cancer globally and the burgeoning demand for targeted therapies have been spurring the demand for oncology-related preclinical studies. In vivo CROs are playing a pivotal role in evaluating the efficacy and safety of novel cancer treatments, including immunotherapies and gene therapies. The segment covers advanced animal models including patient-derived xenografts (PDX), which has further enhanced the segment growth through personalized cancer research.

By GLP Type

The GLP (Good Laboratory Practice) toxicology segment held the largest revenue share in 2023.

GLP toxicology studies are a prerequisite for the approval of new drug candidates before entering clinical studies. These studies are there for testing with a high degree of scrutiny to evaluate the potential harmful effect of the drugs on important organs in the body and systems. The increasing regulatory requirements for drug safety and the growing emphasis on reducing late-stage clinical trial failures have driven the demand for GLP toxicology studies.

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Regional Analysis
North America dominated the global in vivo CRO market in 2023, accounting for 49% of the revenue. The strong position of the region can be ascribed to an established pharmaceutical and biotechnology sector, high R&D expenditure, and leading CROs. On the other hand, the U.S. is the biggest contributor, backed by strong government funding to medical research followed by a strong focus towards drug development. In 2023, the United States invested over USD 47 billion in medical research (NIH), with a significant portion targeting preclinical experiments. Moreover, the presence of major market participants such as Charles River Laboratories and LabCorp have contributed to the region's market stance.

The in vivo CRO market in the Asia-pacific region is expected to grow at the highest CAGR during the forecast period. Increasing investments in R&D, rapid advancements in healthcare infrastructure, and the rising prevalence of chronic diseases are some of the key factors driving market growth. Cost-effective services, skilled workforce and growing dominance in the field are some of the key drivers influencing the growth of major countries including China, India and Japan as emerging hubs for preclinical research. While the Chinese government's "Healthy China 2030" initiative and India's renewed emphasis on fortifying its pharmaceuticals ecosystem have added to the operating landscape.

Recent Developments
- In 2023, Charles River Laboratories expanded its portfolio of genetically engineered rodent models to support oncology and immunology research.
- In January 2024, LabCorp announced the launch of a new GLP-compliant toxicology testing facility in the U.S. to meet the growing demand for preclinical safety studies.

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