

Annual Report 2024 (Jan. – Dec.)

Japan CRO Association

Apr. 25, 2025



Total Number of Members: 47 companies

Regular Member: 13 companies

Associate Member: 34 companies

(Note)

- The business results are calculated in three business areas such as 1) Pharmaceutical Development, 2) Medical Devices and Food & Nutrition-Supplement Development and 3) Others (including Academia Clinical Research and Non-Clinical Research etc.) from 28 companies, excluding 19 associate members in this report in 2024.

* The approximate figures in the missing values are calculated in the basis of average values of valid responses.

2024 JCROA Annual Business Results

1. Total Sales Volume

- I. Total turnover decreased by 23.7 Billion Yen (230.0 Billion Yen from 253.7 Billion Yen), 9.3% in 2024.
- II. Total Sales volume of pharmaceuticals, medical devices, regenerative medical products, food & nutrition supplement, academia clinical research decreased by 11.6 Billion Yen (220.0 Billion Yen from 231.6 Billion Yen), 5.0%. While the sales of pharmaceutical occupying 88.1% decreased by 7.0 Billion Yen (202.7 Billion Yen from 209.6 Billion Yen), 3.3%, the medical devices decreased by 3.9 Billion Yen, 41.9%.

2. Sales Volume of Pharmaceuticals/Medical Devices/Regenerative Medical Products/Food & Nutrition Supplement /Academia Clinical Research by Business Services

- I. Monitoring decreased by 0.9 Billion Yen (-0.7%).
- II. Data Management/Statistical Analysis decreased by 3.2 Billion Yen (-10.0%).
- III. Pharmacovigilance decreased by 6.7 Billion Yen (-19.8%).
- IV. Academia Clinical Research decreased by 1.23 Billion Yen (-14.1%).

3. Pharmaceuticals Sales by Clinical Phases

- I. Sales volume of Phase I to III decreased by 1.2%. Post-marketing Clinical Trials decreased by 26.6%, also Post-Marketing Surveillance decreased by 8.4%. The business sectors of temporary employee placement increased by 1.1 Billion Yen, (+7.3%).
- II. In the business services classified as “Others”, “Project Management” was the most abounding in the last year, and next, “Investigational Product Allocation”, “SOP Preparation, IT support & system setup, Transportation/storage of laboratory test materials & Investigational products.

4. Total number of employees joining JCROA reached 18,658 by decrease of 1,210. The CRA joining JCROA, engaged with clinical trials reached 7,101 by decrease of 78. The pharmacovigilance decreased in both sales volume and employee numbers.

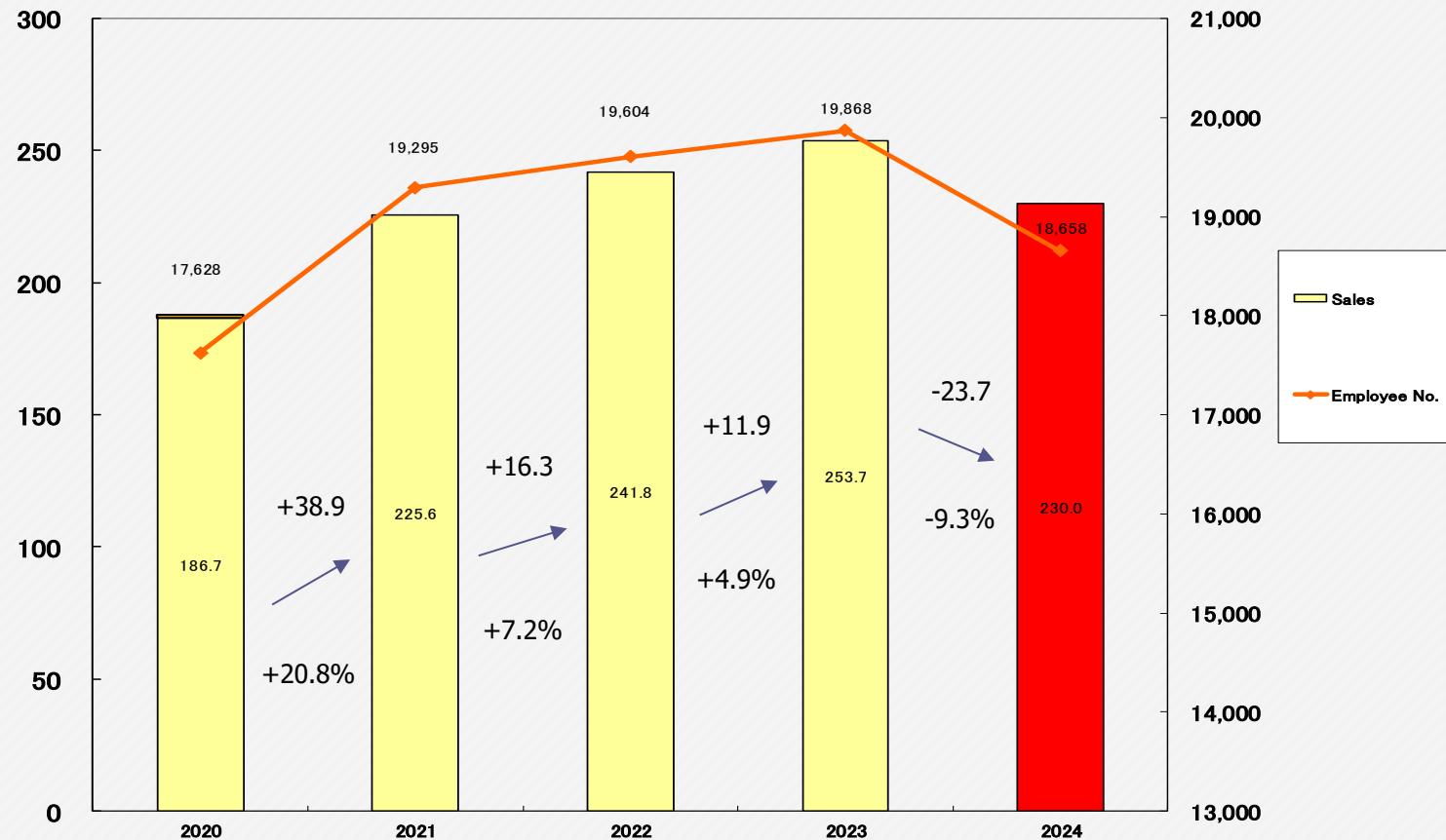
5. Monitoring Projects by Therapeutic Area

As Oncology was the most prevalent therapeutic area in the monitoring project, followed by CNS, Sensory organ.

Sales and Employees 2020-2024*

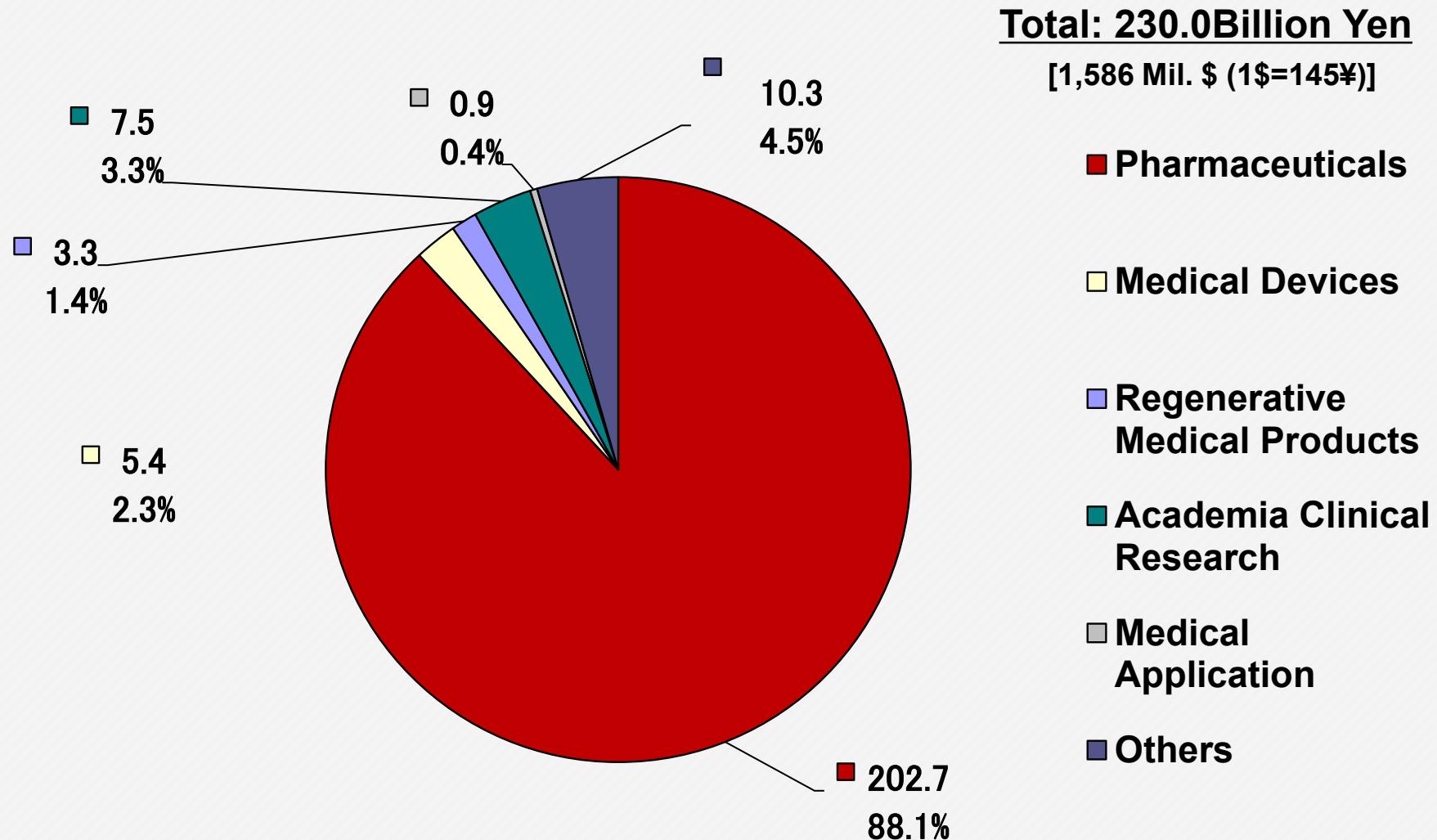
(Sales Unit : Bil. Yen)

(Employee No.)



* Count and estimate are based on data of 31 in 2020 and 2021, 32 in 2022, 29 in 2023, 28 member companies in 2024, respectively.

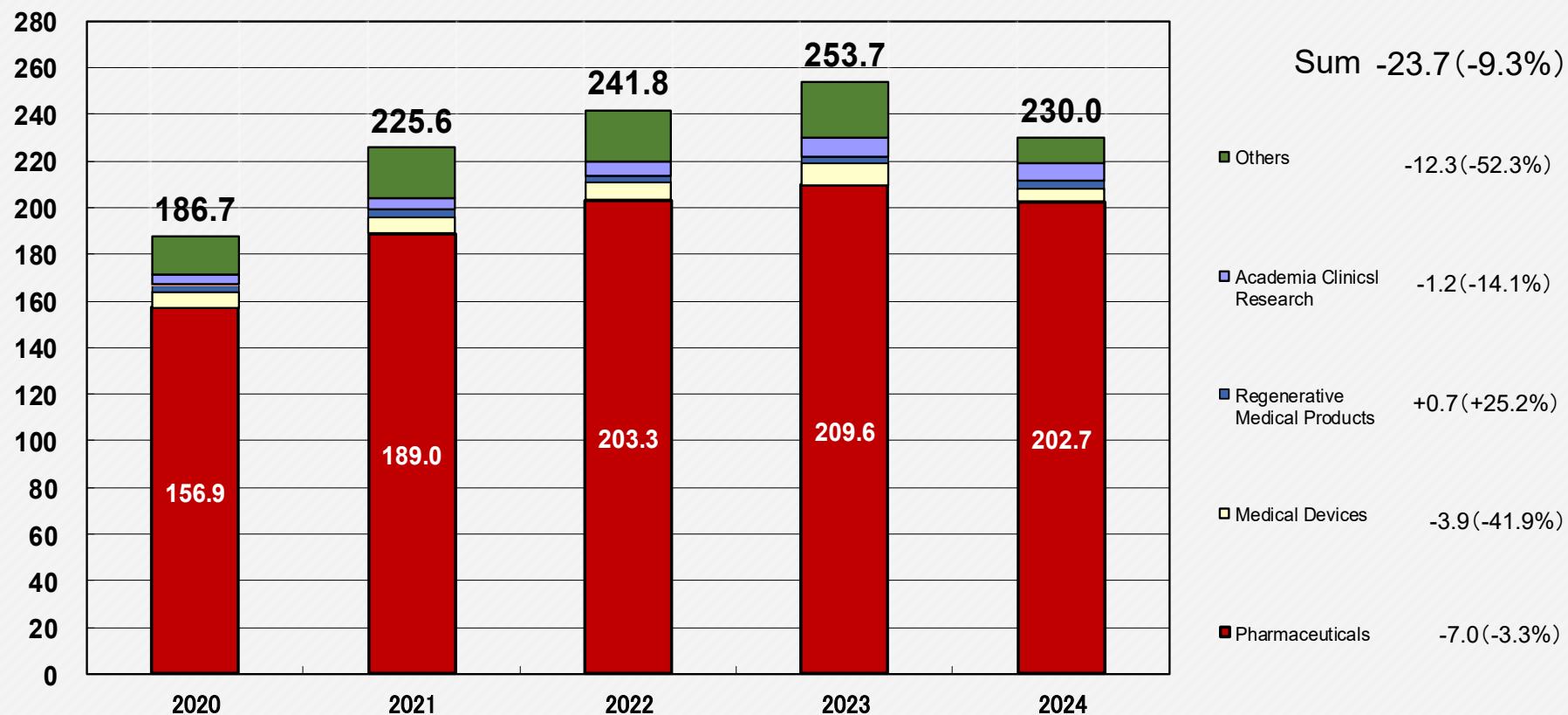
2024 Sales by Business Fields



Sales by Business fields 2020-2024

(Sales Unit: Bil. Yen)

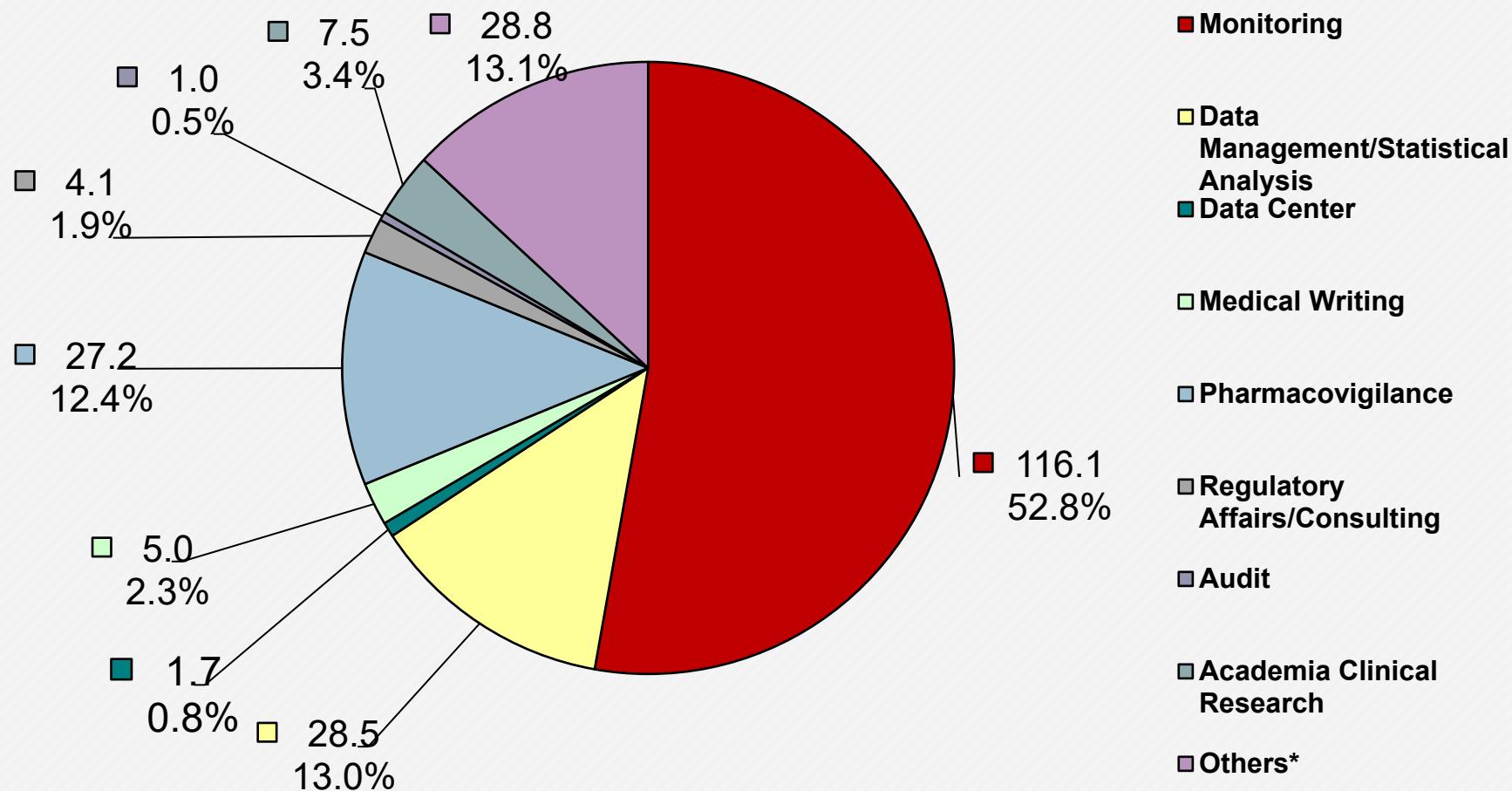
Compared to 2023



2024 Sales by Business Services (Pharmaceuticals/Medical Devices/Regenerative Medical Products/Food & Nutrition Supplement/Academia Clinical Research)

Total: 220.0.Billion Yen

[1,517 Mil. \$ (1\$=145¥)]

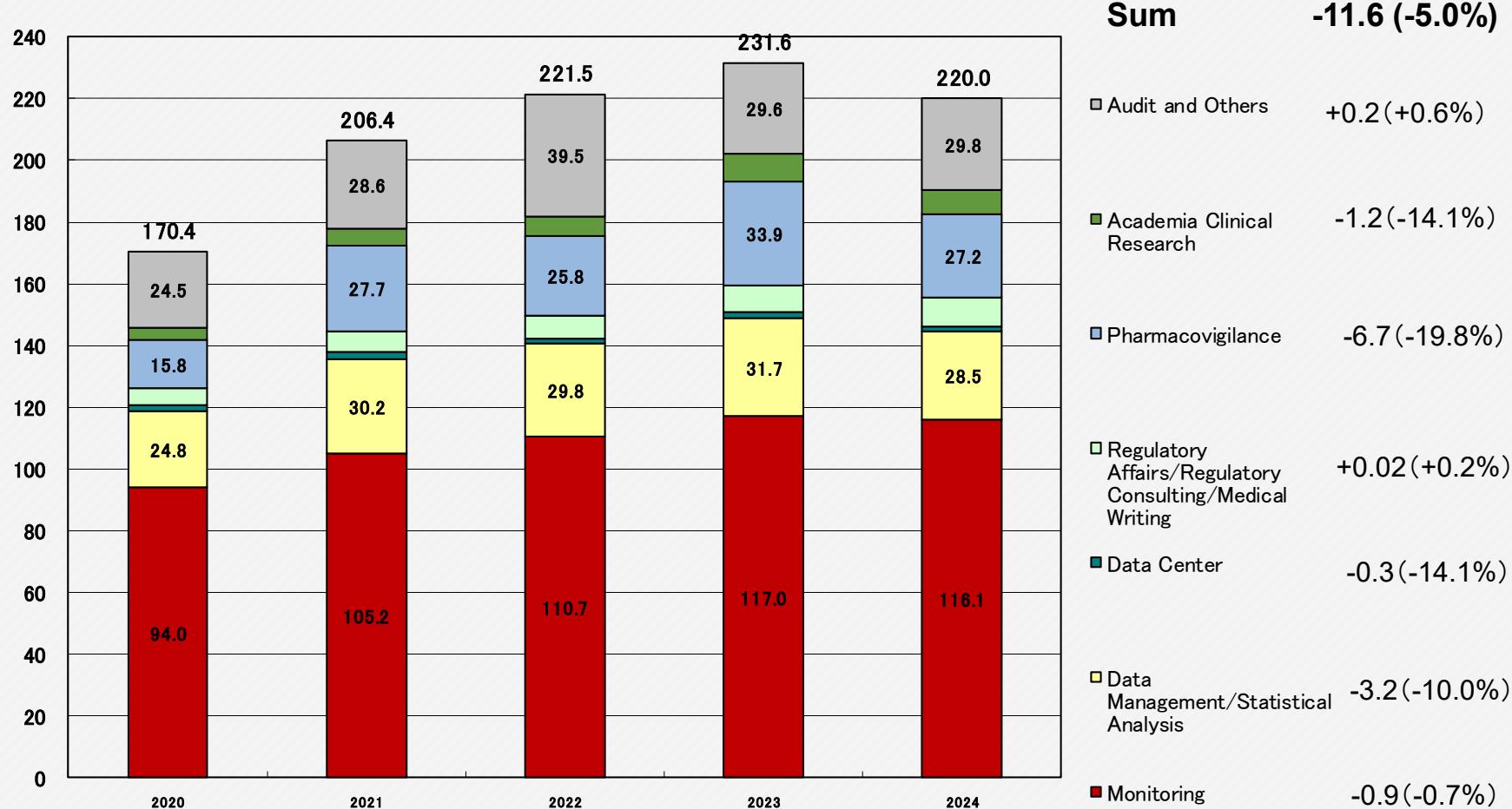


*Please refer to page 10 for "others".

Sales by Business Services 2020-2024 (Pharmaceuticals/Medical Devices/Regenerative Medical Products/Food & Nutrition Supplement/Academia Clinical Research)

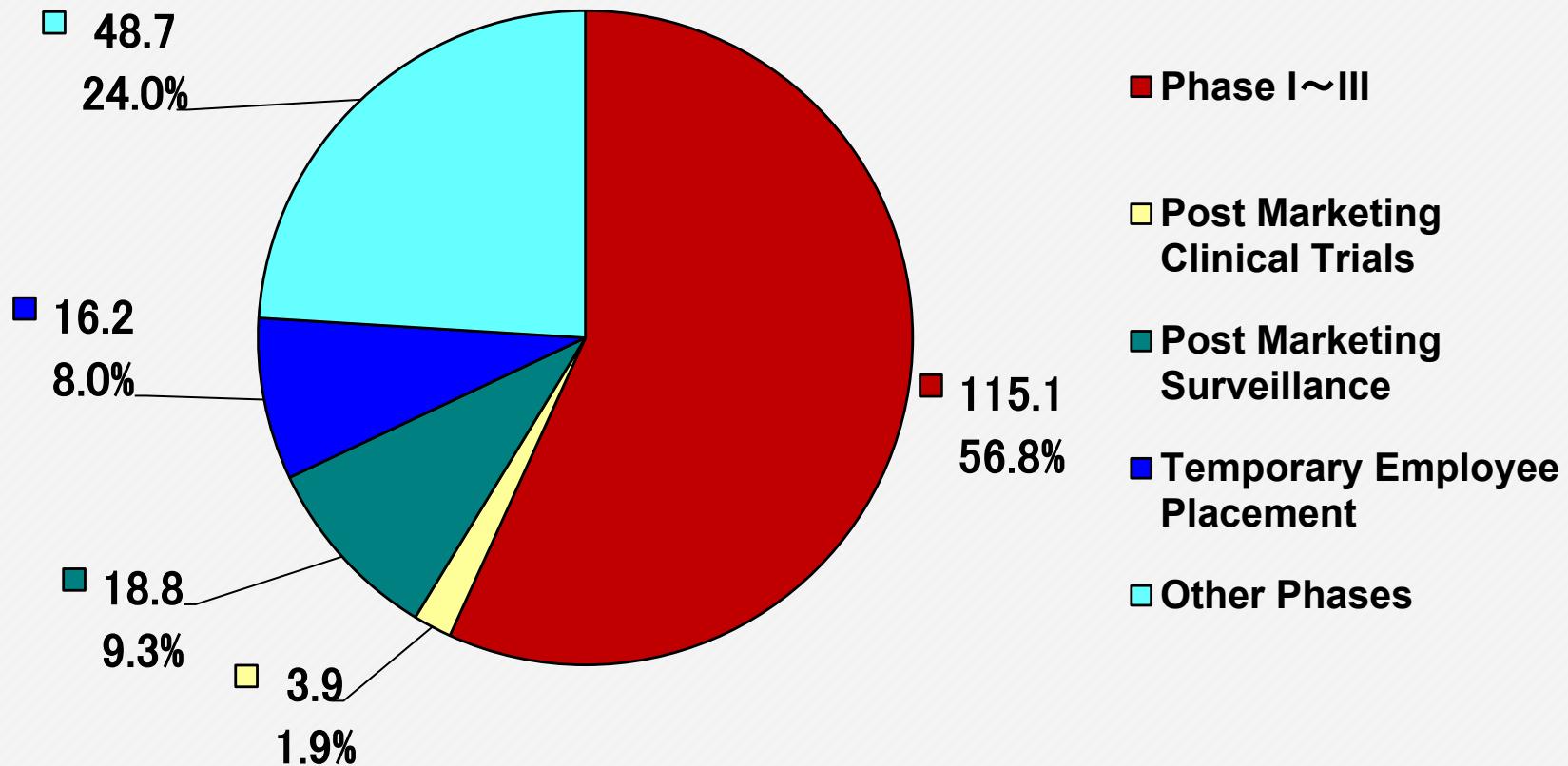
Compared to 2023

(Sales Unit: Bil. Yen)



2024 Sales of Business Services for Pharmaceuticals by Clinical Phases

Total : 202.7 Billion Yen
[1,398 Mil. \$ (1\$=145.0¥)]

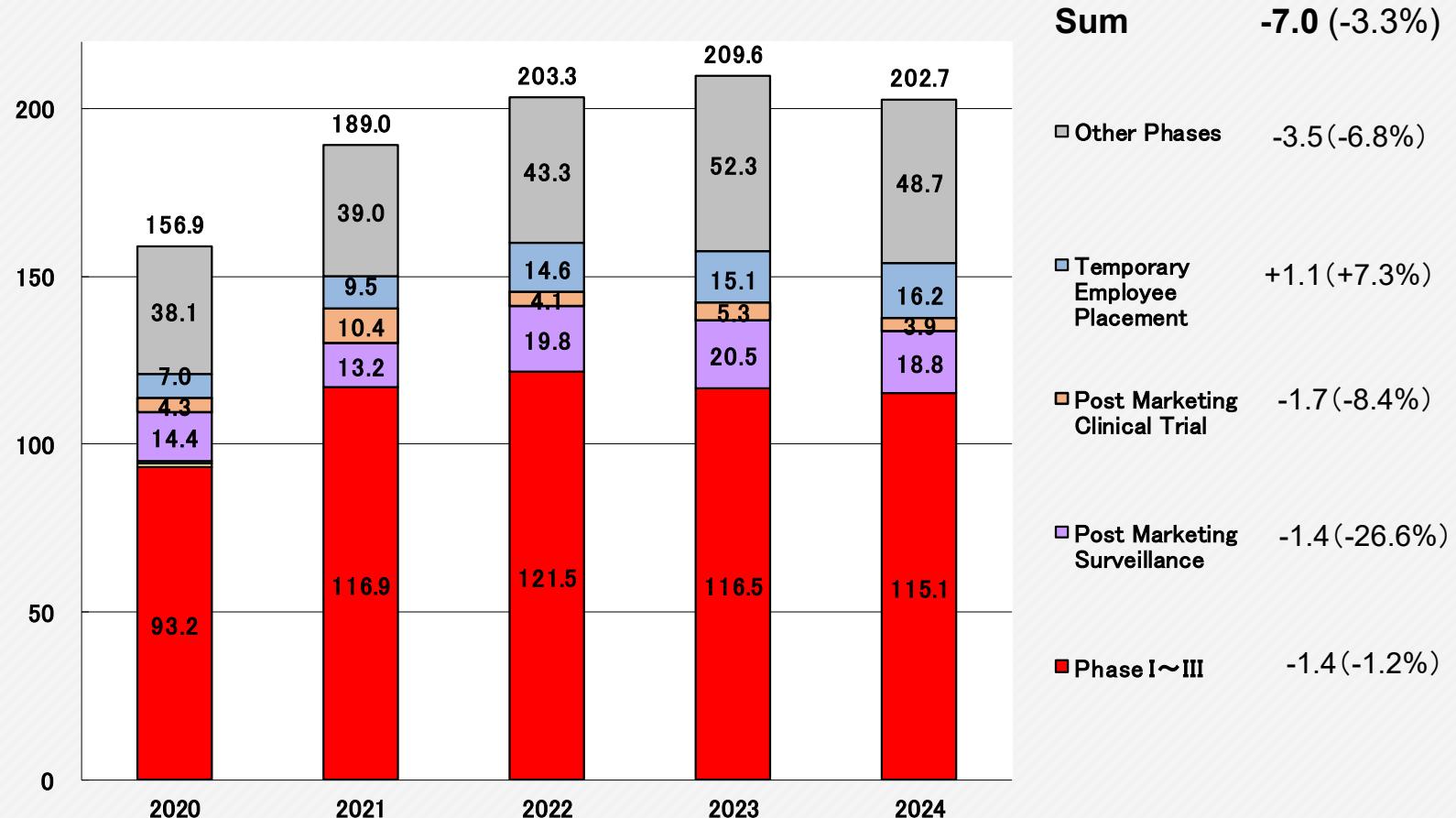


The sales volume of Phase I to III were combined. The ones of Pharmacovigilance and Regulatory Affairs/Consulting are included in “Other Phases”. The sales of Academia Clinical Research are not included in this figure, since they are not investigated by business field and phase.

Sales of Business Service for Pharmaceuticals by Clinical Phases 2020-2024

(Sales Unit: Bil. Yen)

Compared to 2023



The sales volume of Phase I to III were combined. The ones of Pharmacovigilance and Regulatory Affairs/Consulting are included in "Other Phases". The sales of Academia Clinical Research are not included in this figure, since they are not investigated by business field and phase.

Other services Conducted in relation to Medical Products 2024

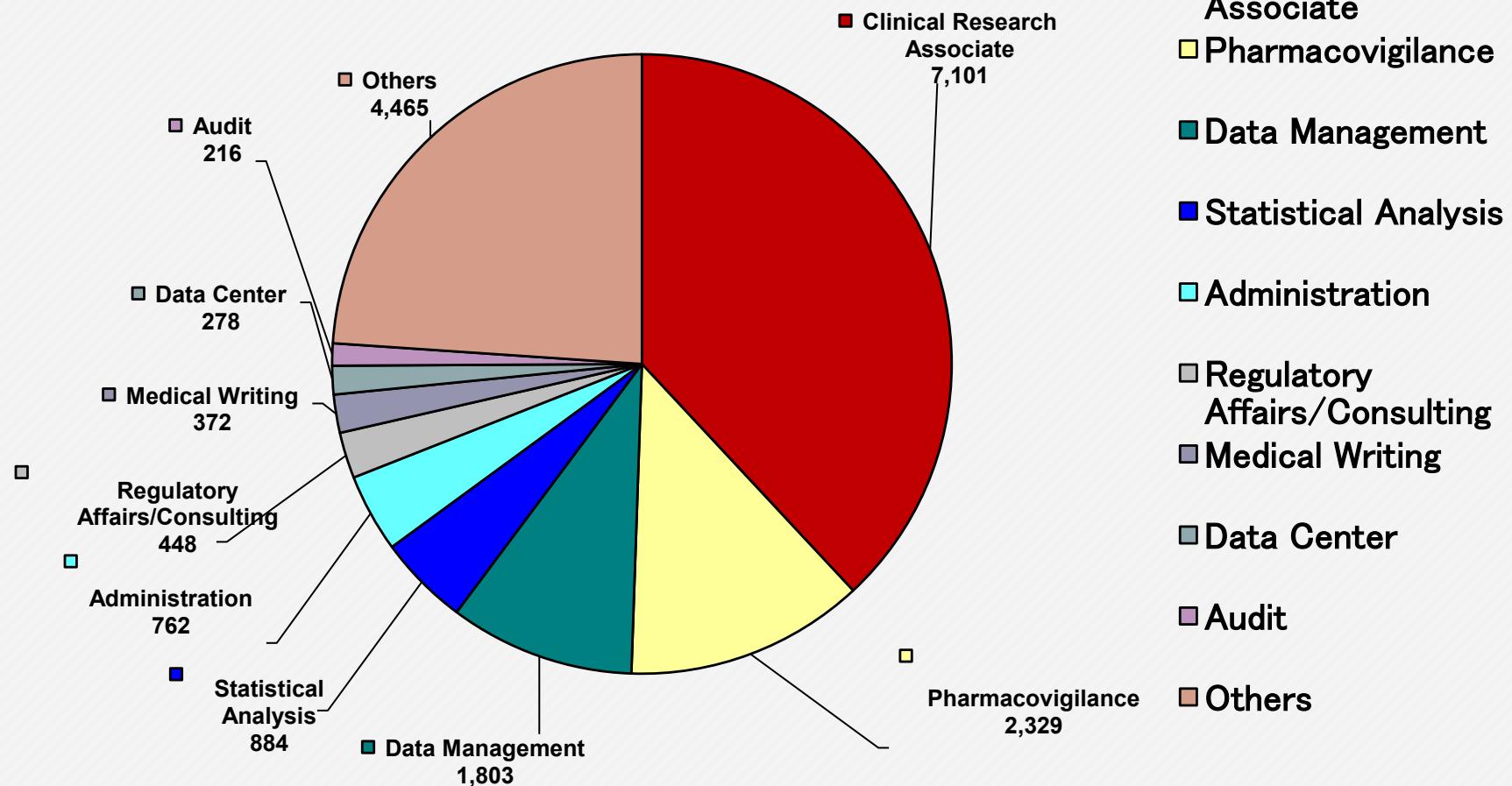
Business Services	Sum	Business Services	Sum
Project Management	10	Support for Clinical Trial Office of Sites	6
Investigational Product Allocation	9	Scientific Report Preparation	5
Education & Training	7	Translation	3
SOP Preparation	7	Advertisement of recruiting clinical study subjects, site-selection	3
IT support, system setup (excluding EDC)	7	Facilitating service for Investigator Meeting	3
Transportation/storage of labo. test materials & Investigational products	7		

Other Services with Less Than Two Responses:

- Study Management
- Support of PMDA face-to-face Consultation
- Support for Clinical Trial Notifications
- Database Research
- Providing ePRO (e-Patient Reported Outcome)
- GCP drug-application inspection coordination
- System Development for Decentralized Clinical Trials (DCT)
- Creation of Materials for Patients Participating in Clinical Trials
- EDC User Training
- Document Storage Tasks
- Application of Electronic Data

2024 Employee Numbers by Job Title

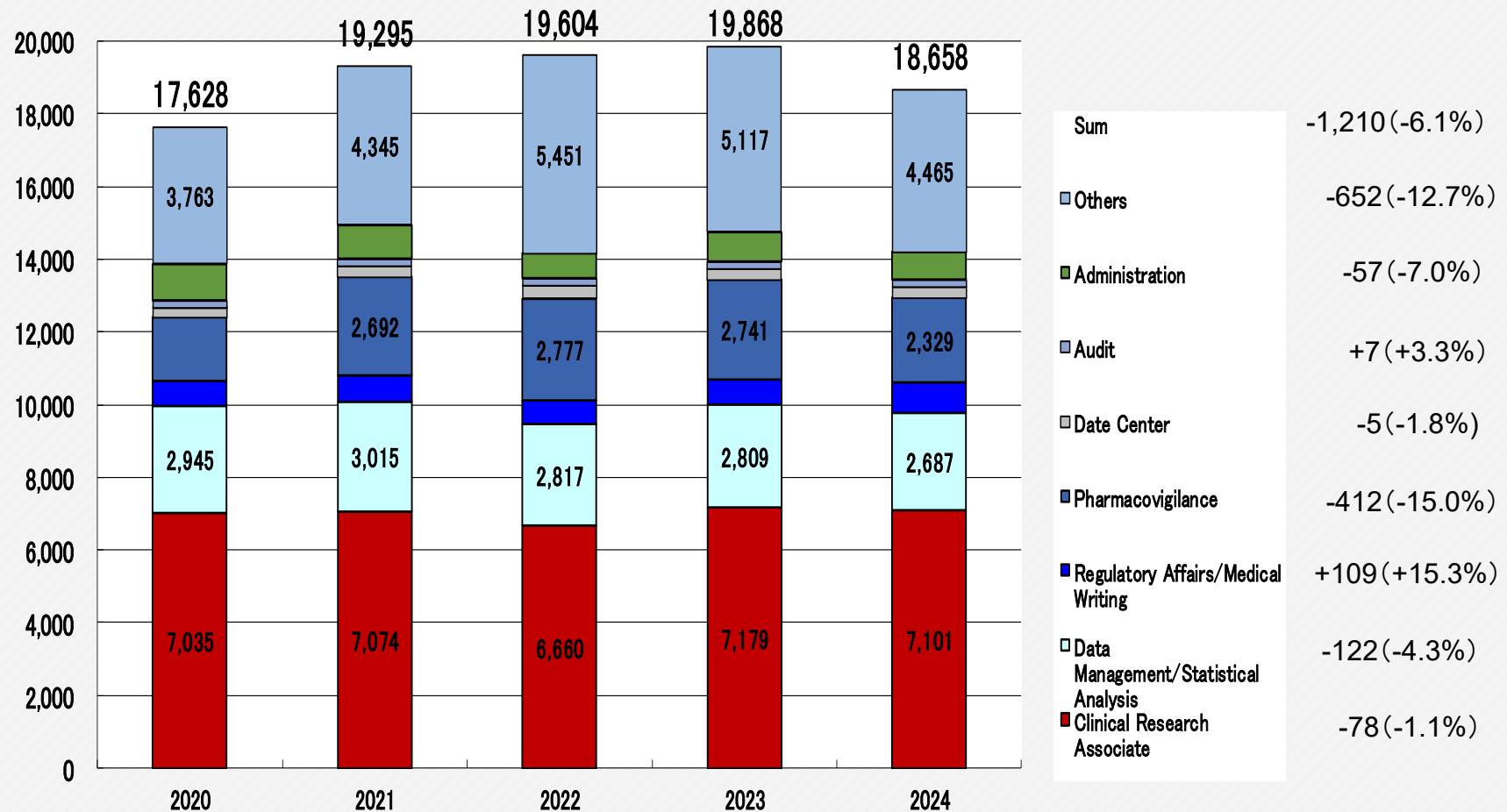
Total No. of Employee : 18,658



Employee Numbers by Job Title 2020-2024

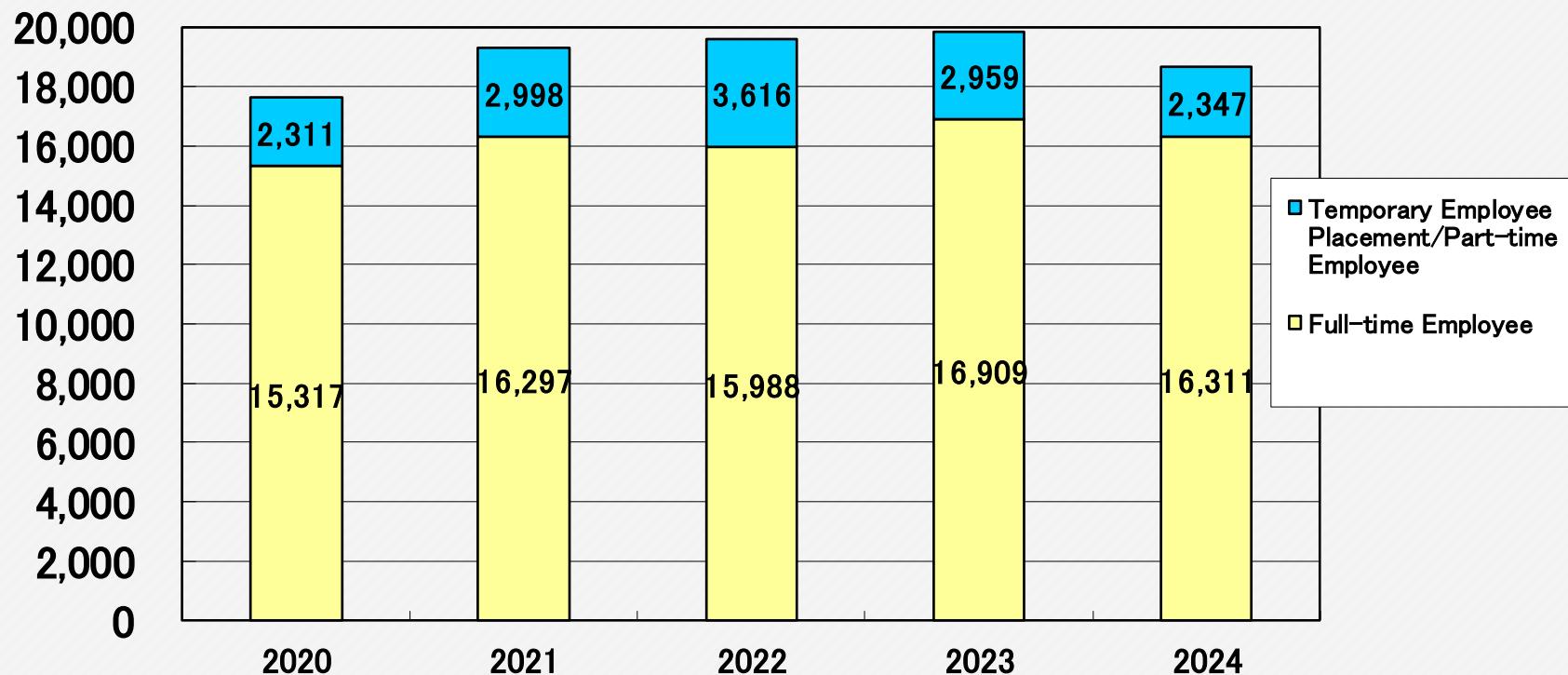
(Unit: No. of employee)

Compared to 2023



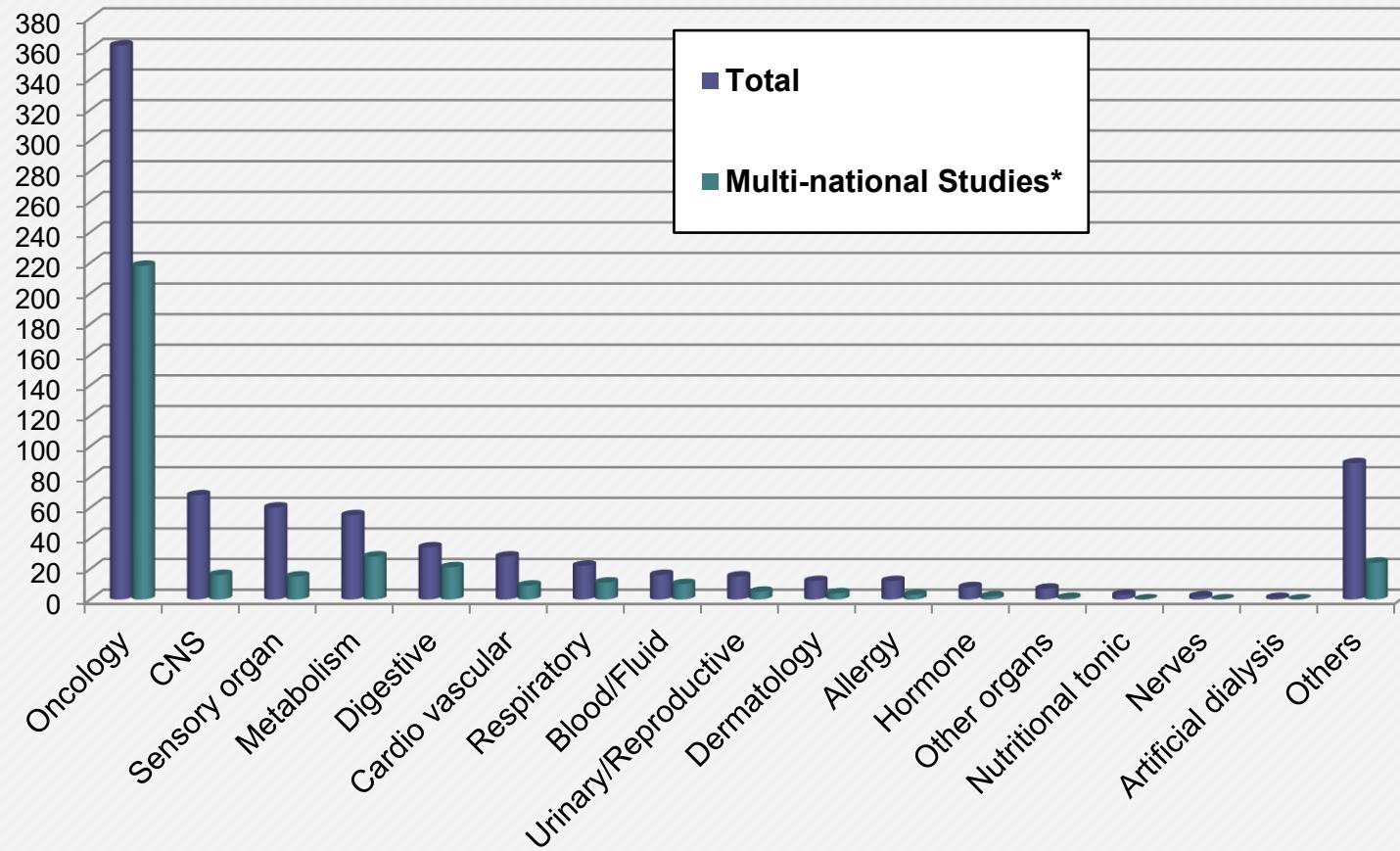
Employee Numbers by Employment Type 2020-2024

2024 Total No. of employees :18,658



2024 Monitoring Projects by Therapeutic Area

(Unit : No. of projects)



- **Multi-National Studies:** Studies conducted in multi countries simultaneously with the same protocol.

(Note :The valid responses of Monitoring projects (total:794) are classified.