



# Annual Report 2023 (Jan. – Dec.)

**Apr. 24, 2024**  
**Japan CRO**  
**Association**

# JCROA 2023

**Total Number of Members: 49 companies**

**Regular Member: 14 companies**

**Associate Member: 35 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 29 companies, excluding 20 associate members in this report in 2023.
- \* The approximate figures in the missing values are calculated in the basis of average values of valid responses.

# 2023 JCROA Annual Business Results

## 1. **Total Sales Volume**

- ① Total turnover increased by 11.88 Billion Yen (253.73 Billion Yen from 241.85 Billion Yen in 2022), 4.9% in 2023.
- ② Total Sales volume of pharmaceuticals, medical devices, regenerative medical products, food & nutrition supplement, academia clinical research increased by 10.18 Billion Yen (231.62 Billion Yen from 221.44 Billion Yen), 4.6%. While the sales of pharmaceuticals sharing 82.6%, 6.39 Billion Yen increased (209.64 Billion Yen from 203.25 Billion Yen) by 3.1%, the medical devices also increased by 1.57 Billion Yen, 20.4%.

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

- ① Monitoring increased by 6.29 Billion Yen. (+ 5.7%)
- ② Data Management/Statistical Analysis increased by 1.89 Billion Yen. (+6.3%)
- ③ Pharmacovigilance reached 33.95 Billion Yen, increased by 8.12 Billion Yen. (+31.4%)
- ④ Academia Clinical Researches reached 8.71 Billion Yen, increased by 2.33 Billion Yen. (+36.5%)

## 3. **Pharmaceuticals Sales by Clinical Phases**

- ① Sales volume of Phase I to III decreased by 4.1%. Post-marketing Clinical Trials increased by 28.1%, also Post-Marketing Surveillance increased by 3.8%. The business sectors of temporary employee placement increased by 530 Million Yen, (+3.6%).
- ② In the business services classified as “Others”, “SOP preparation” was the most abounding in the last year, and next, “Project Management”, “Education & Training” and “Medical Report Preparation” were abounding.

## 4. **Total number of employees joining JCROA** reached 19,868 by increase of 264. The CRA joining JCROA, engaged with clinical trials including QC, reached 7,179 by increase of 519. The employee number of pharmacovigilance and registration/data center decreased due to downsizing, while the sales volume has increased.

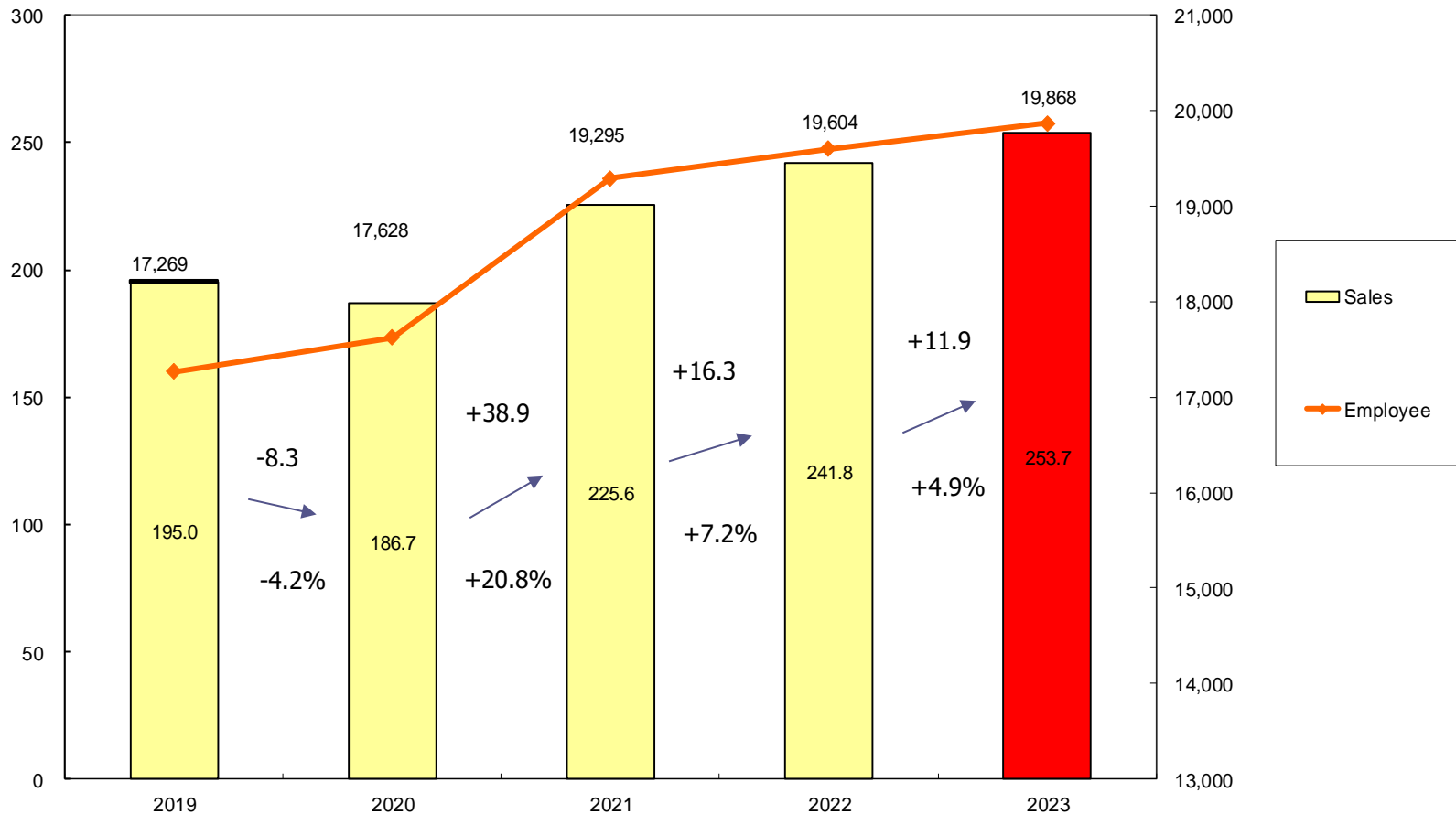
## 5. **Monitoring Projects by Therapeutic Area**

As in the last year, Oncology was the most prevalent therapeutic area in the monitoring project, followed by CNS, Metabolism.

# Sales and Employees 2019-2023\*

(Sales Unit : Billion Yen)

(Employee No.)

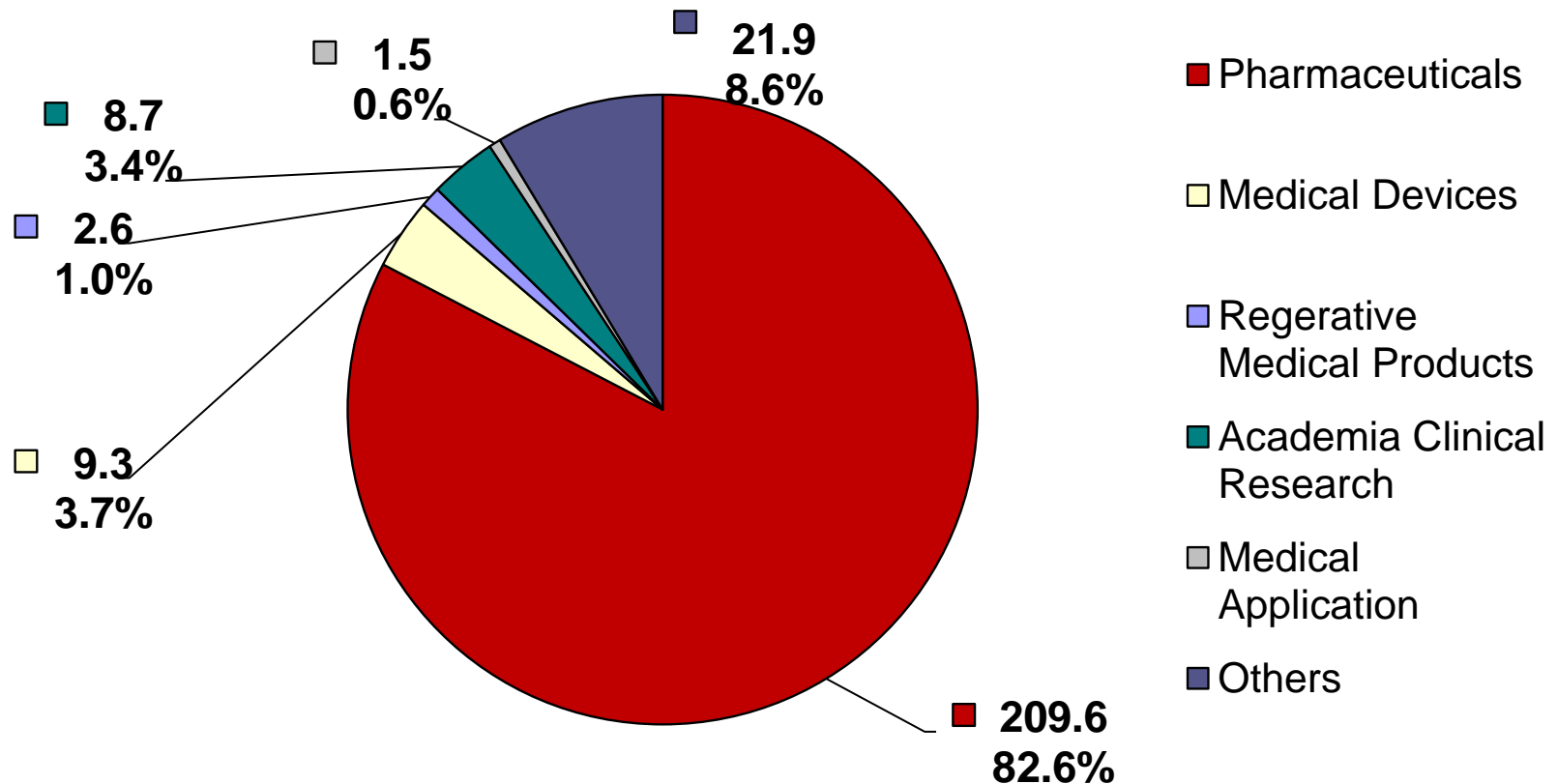


\* Count and estimate are based on data of 32 in 2019, 31 in 2020 and 2021, 32 in 2022, 29 member companies in 2023, respectively.

# 2023 Sales by Business Fields

**Total: 253.7 Billion Yen**

[1,637 Mil. \$ (1\$=155¥)]

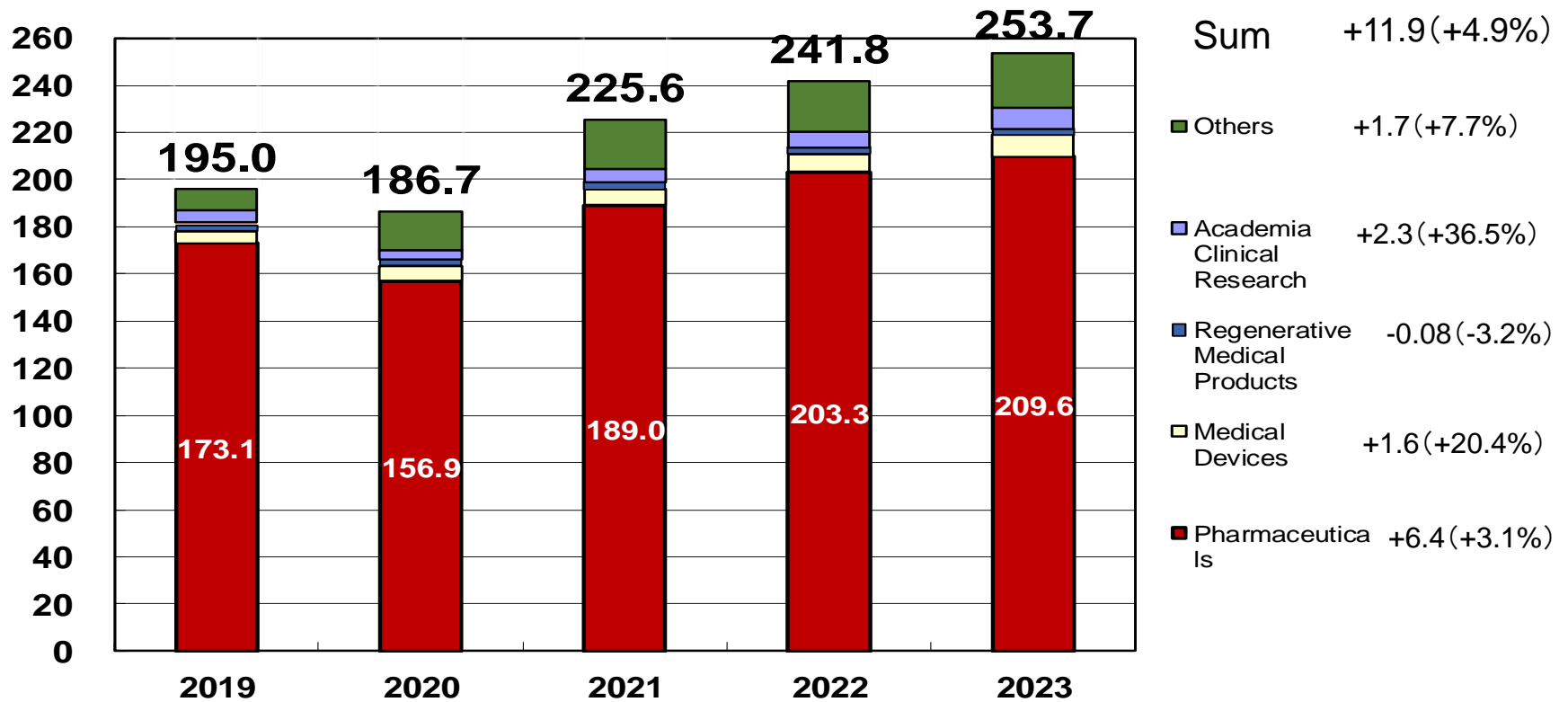


※Others includes non-clinical and SMO business, etc.

# Sales by Business fields 2019-2023

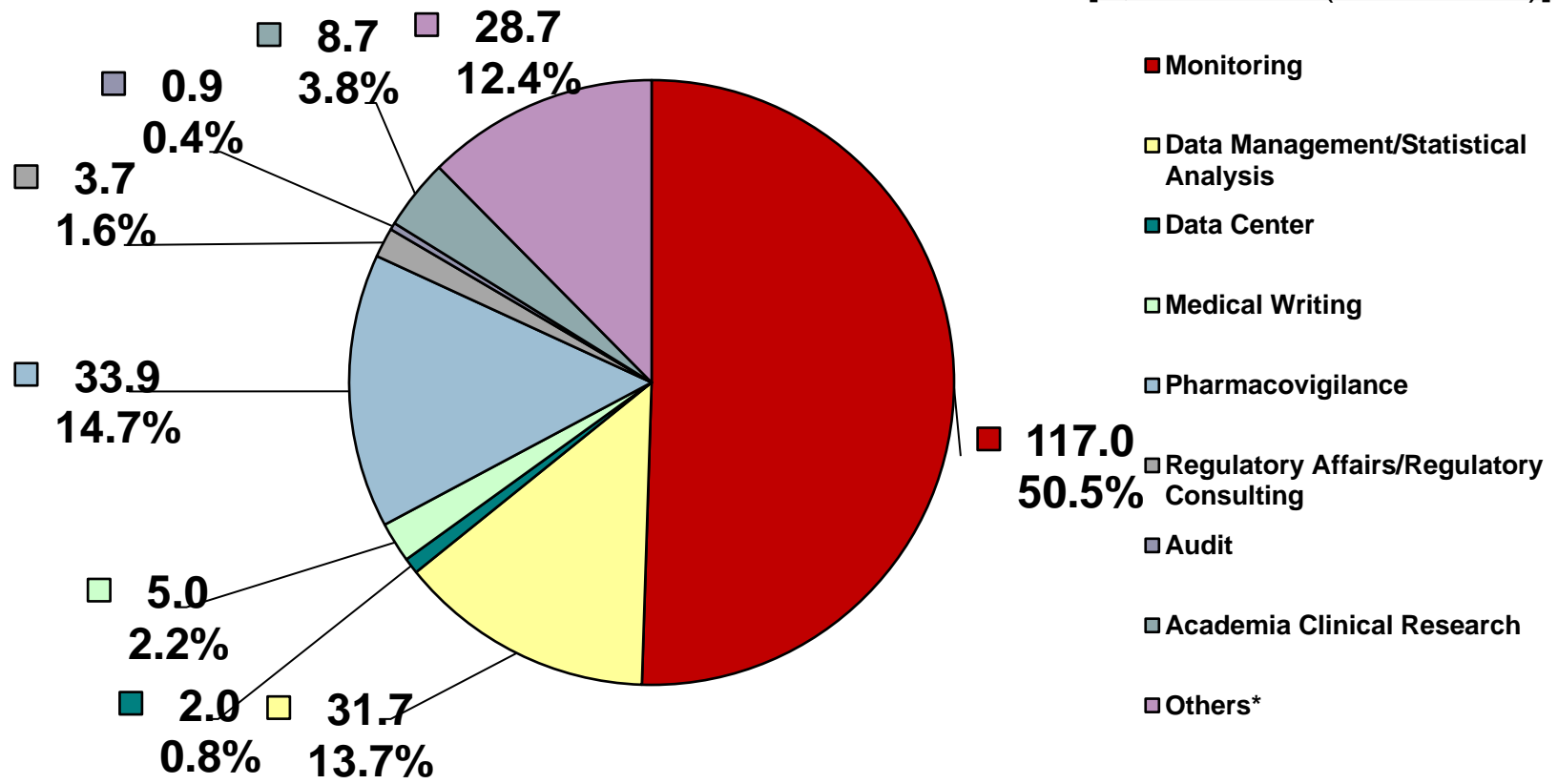
(Sales Unit: Billion Yen)

Compared to 2022



# 2023 Sales by Business Services (Pharmaceuticals/Medical Devices/Regenerative Medical Products/Food & Nutrition Supplement/Academia Clinical Research

Total : 231.6 Billion Yen  
 [1,494 Mil. \$ (1\$=155.0¥)]

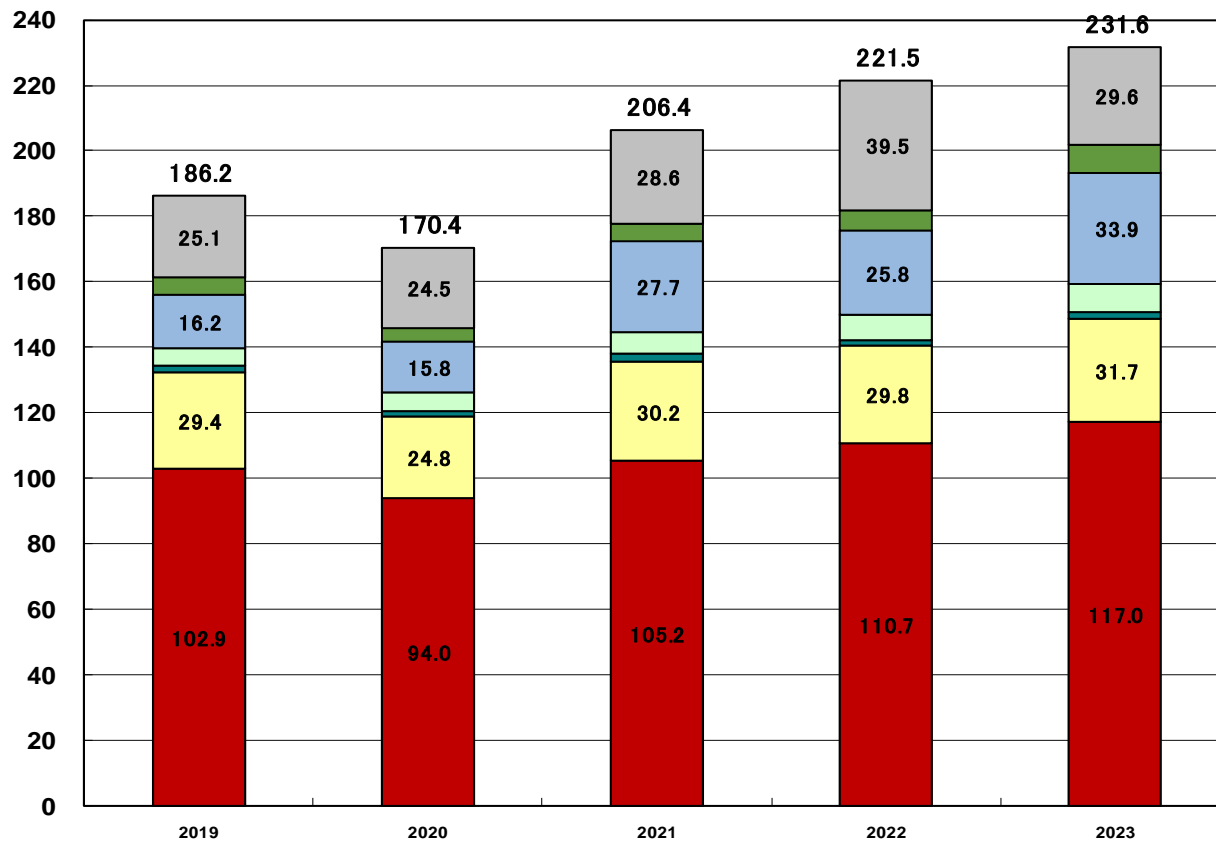


\*Please refer to page 10 for "others".

# Sales by Business Services 2019-2023 (Pharmaceuticals/Medical Devices/Regenerative Medical Products/Food & Nutrition Supplement/ Academia Clinical Research)

Compared to 2022

(Sales Unit: Billion Yen)



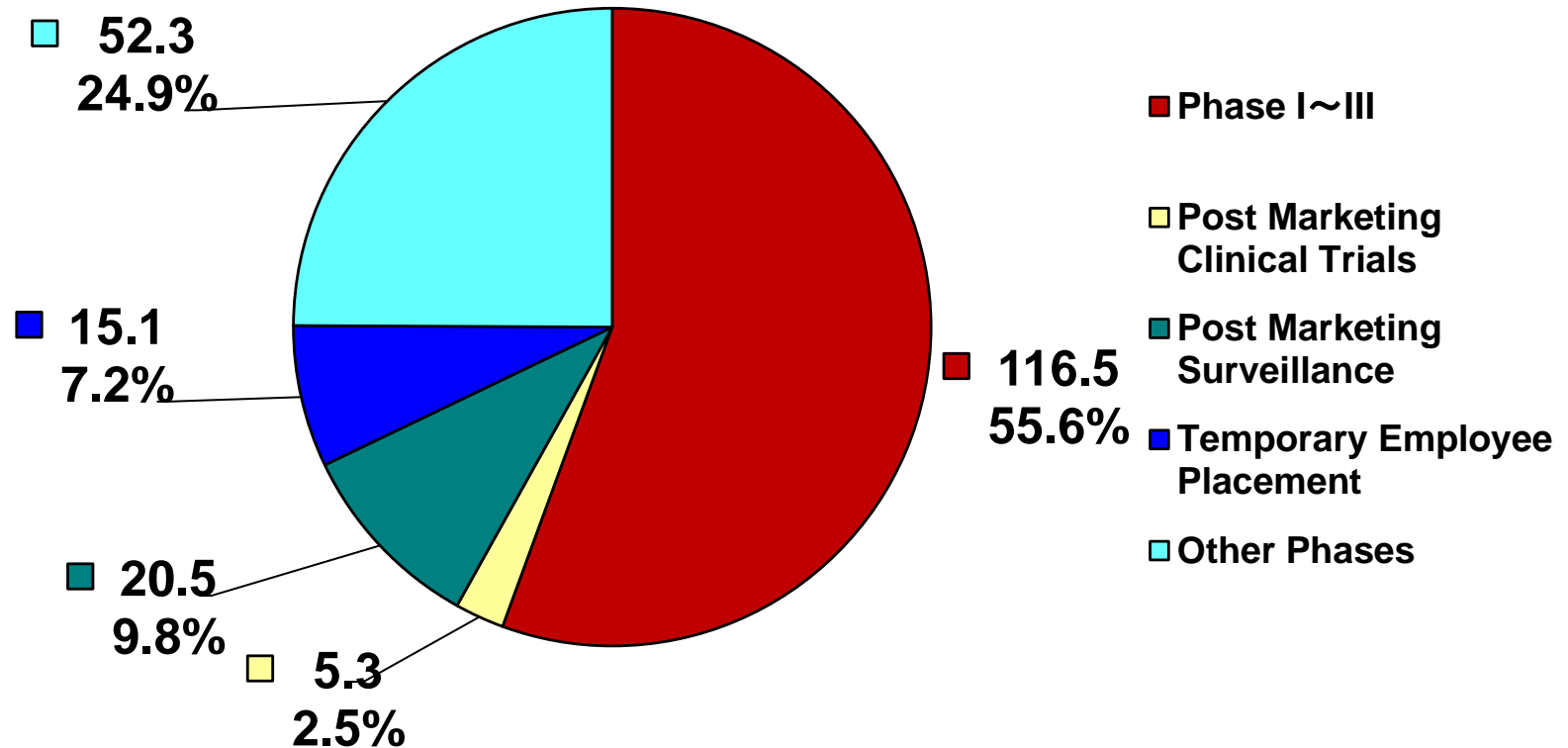
**Sum +10.2(+4.6%)**

■ Audit and Others	-9.9(-25.0%)
■ Academia Clinical Research	+2.3(+36.5%)
■ Pharmacovigilance	+8.1(+31.4%)
■ Regulatory Affairs/Regulatory Consulting/Medical Writing	+1.2(+16.0%)
■ Data Center	+0.25(+14.8%)
■ Data Management/Statistical Analysis	+1.9(+6.3%)
■ Monitoring	+6.3(+5.7%)



# 2023 Sales of Business Services for Pharmaceuticals by Clinical Phases

Total : 209.6 Billion Yen  
 [1,352 Mil. \$ (1\$=155.0¥)]

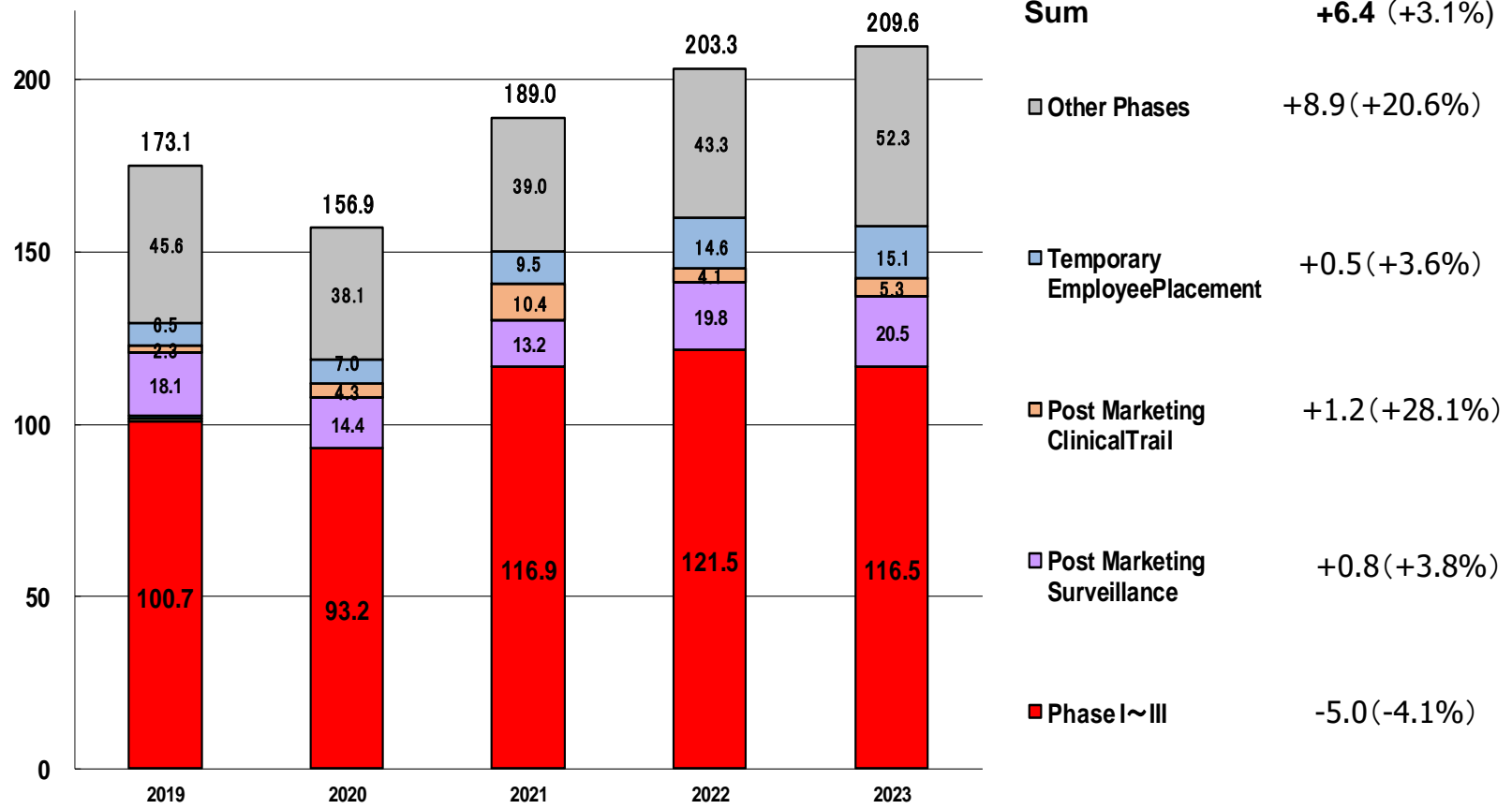


The sales volume of Pharmacovigilance and Regulatory Affairs/Consulting are included in “Other Phases”.  
 The sales of Academia Clinical Research are not included in this figure.

# Sales of Business Service for Pharmaceuticals by Clinical Phases 2019-2023

(Sales Unit.: Billion Yen )

Compared to 2022



The sales volume of Pharmacovigilance and Regulatory Affairs/Consulting are included in “Other Phases”.  
 The sales of Academia Clinical Research are not included in this figure.

## Other services Conducted in relation to Medical Products 2023

Business Services	No.	Business Services	No.
SOP preparation	11	IT support, system setup (excluding EDC)	6
Project Management	10	Transportation/storage of labo. test materials & Investigational products	5
Education & Training	8	Translation	4
Medical Report Preparation	8	Advertisement of recruiting clinical study subjects, site-selection	3
Investigational Product Allocation	7	Facilitating service for Investigator Meeting	3

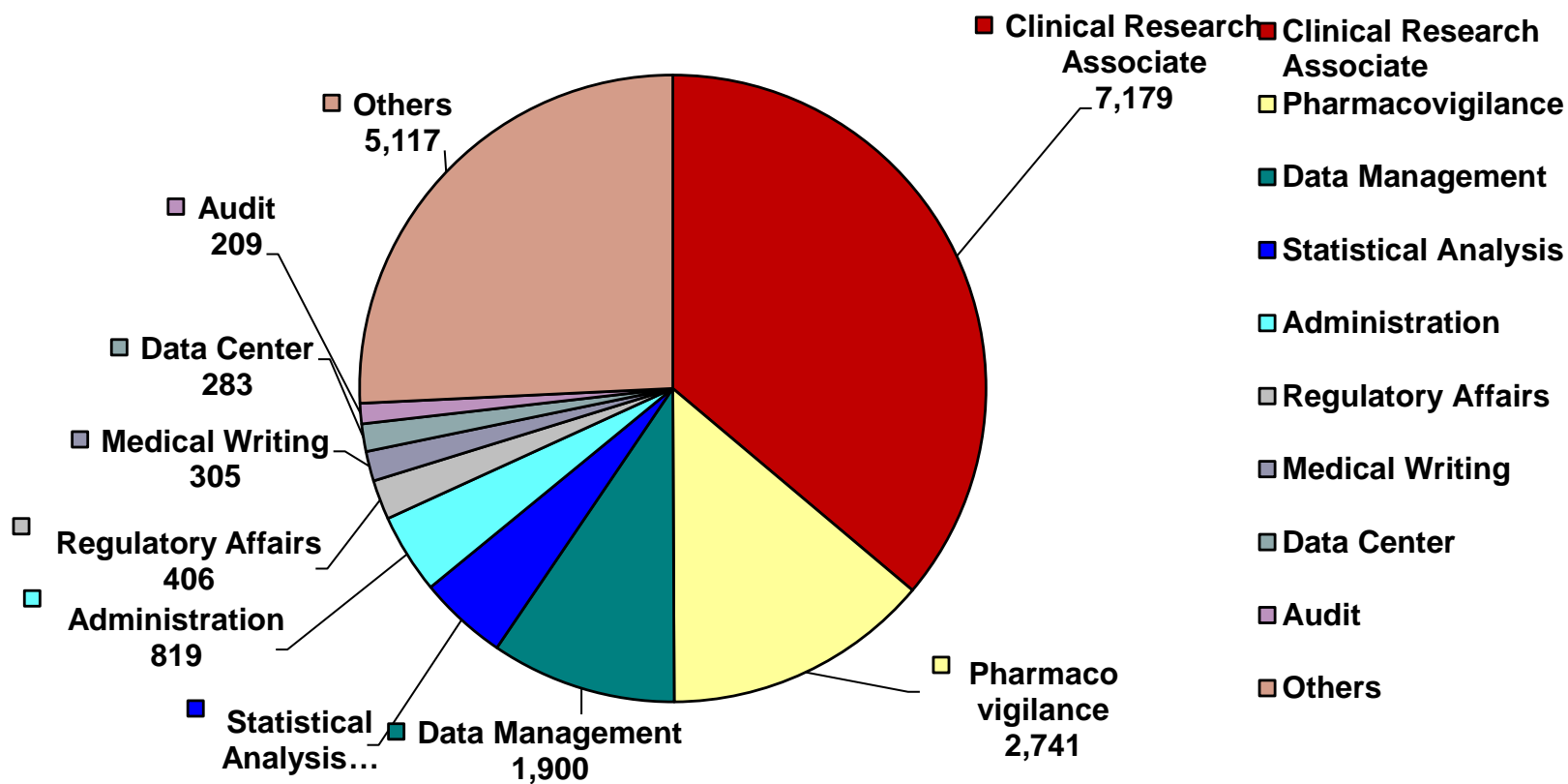
No: Number of responses

### Other Services with Less Than Two Responses:

- Management and Operation of the Effectiveness and Safety Evaluation Committee, Committee Correspondence
- Support for Clinical Trial Office of Sites
- Support for Clinical Trial Notifications
- Real-World Evidence and Database Research
- System Development for Decentralized Clinical Trials (DCT)
- Compliance Inspection Response
- Emergency Reception Tasks
- Help Desk Operations
- Registration Tasks for “Japan Registry of Clinical Trials”
- Creation of Materials for Patients Participating in Clinical Trials
- EDC User Training
- Document Storage Tasks
- Provision of electronic Patient Reported Outcome

# 2023 Employees Numbers by Job Title

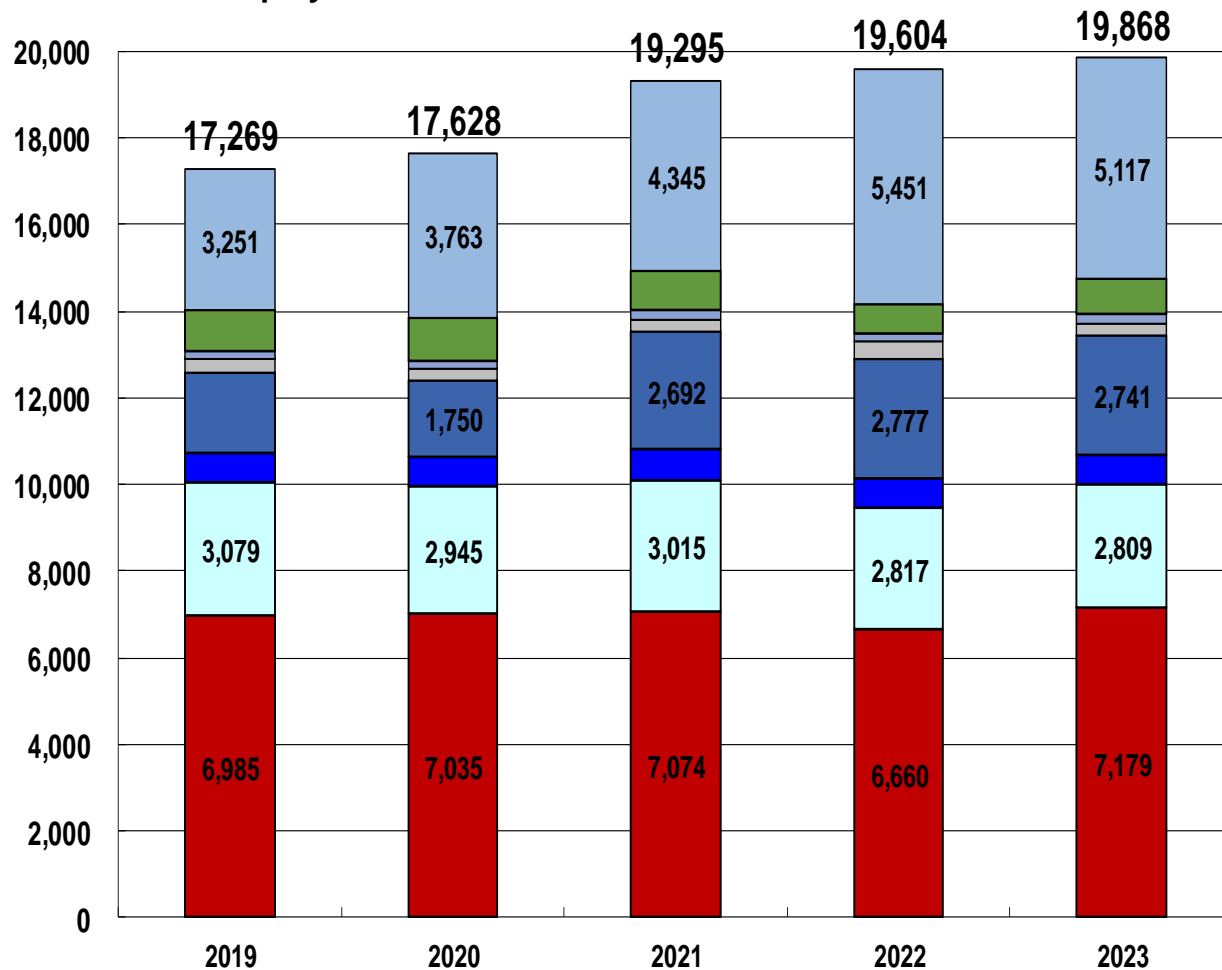
Total No. of employees: 19,868



# Employee Numbers by Job Title 2019-2023

(Unit: No. of employees)

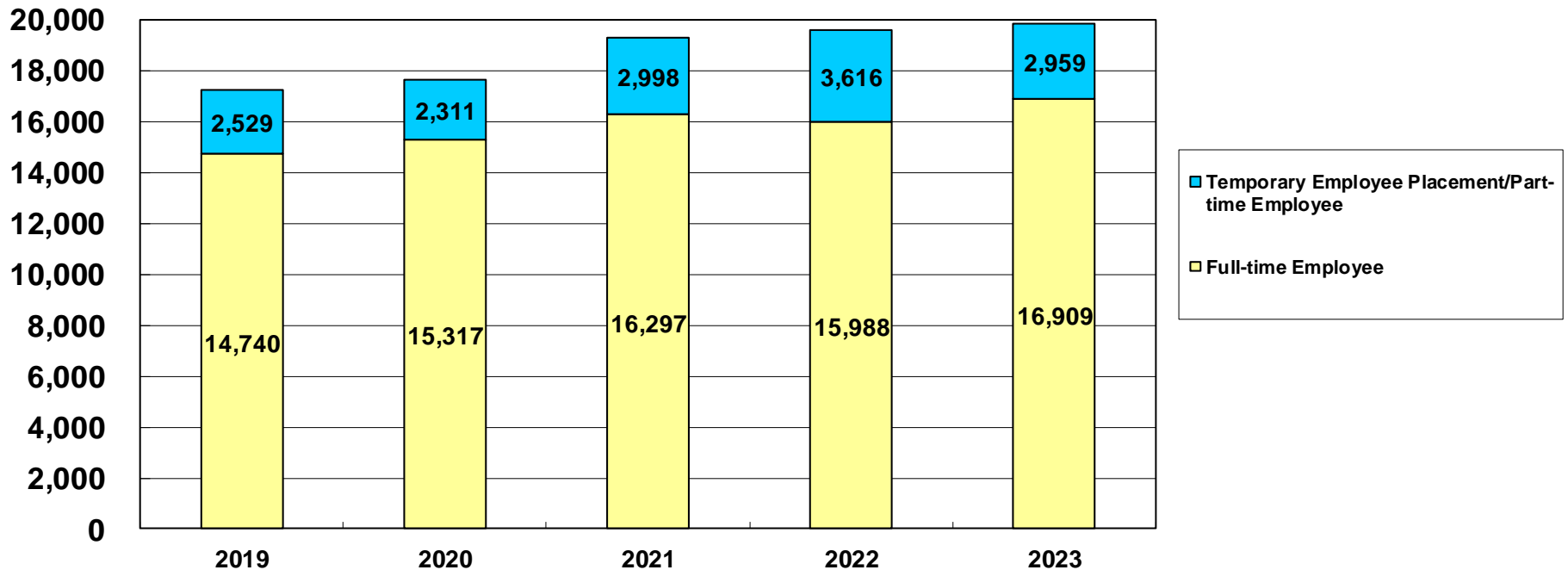
Compared to 2022



<b>Sum</b>	+264 (+1.3%)
<b>Others</b>	-334 (-6.1%)
<b>Administration</b>	+140 (+20.6%)
<b>Audit</b>	+18 (+9.4%)
<b>Data Center</b>	-87 (-23.5%)
<b>Pharmacovigilance</b>	-36 (-1.3%)
<b>Regulatory Affairs/Medical Writing</b>	+52 (+7.9%)
<b>Data Management/Statistical Analysis</b>	-8 (-0.2%)
<b>Clinical Research Associate</b>	+519 (+7.8%)

# Employee Numbers by Employment Type 2019-2023

2023 Total No. of employees :19,868



# 2023 Monitoring Projects by Therapeutic Area

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

(Unit: No. of projects)

