

Clinical research in France – Key figures

2025 Barometer



AFCROs 2025 Barometer



Introduction, methodology

- Data extracted from **clinicaltrial.gov database** on 2025, January 16 and **adjusted*** for 2024 presentations in France.
- The comparisons between **major European countries** were not adjusted, so interpretation should rather be **based on rankings**.
- Since the end of COVID-19, all reports indicate a **steady year-over-year decline** in the number of clinical studies **conducted in Europe**:
 - EFPIA (*Assessing the clinical trial ecosystem in Europe, October 2024*)... Europe is losing global share of trials and global share of patients enrolled into trials...
 - LEEM (2024 Attractiveness Barometer, June 18, 2024): France remained in 3rd place for clinical trials in Europe in 2023...
- This decline affects all European countries, with variations by country and year.

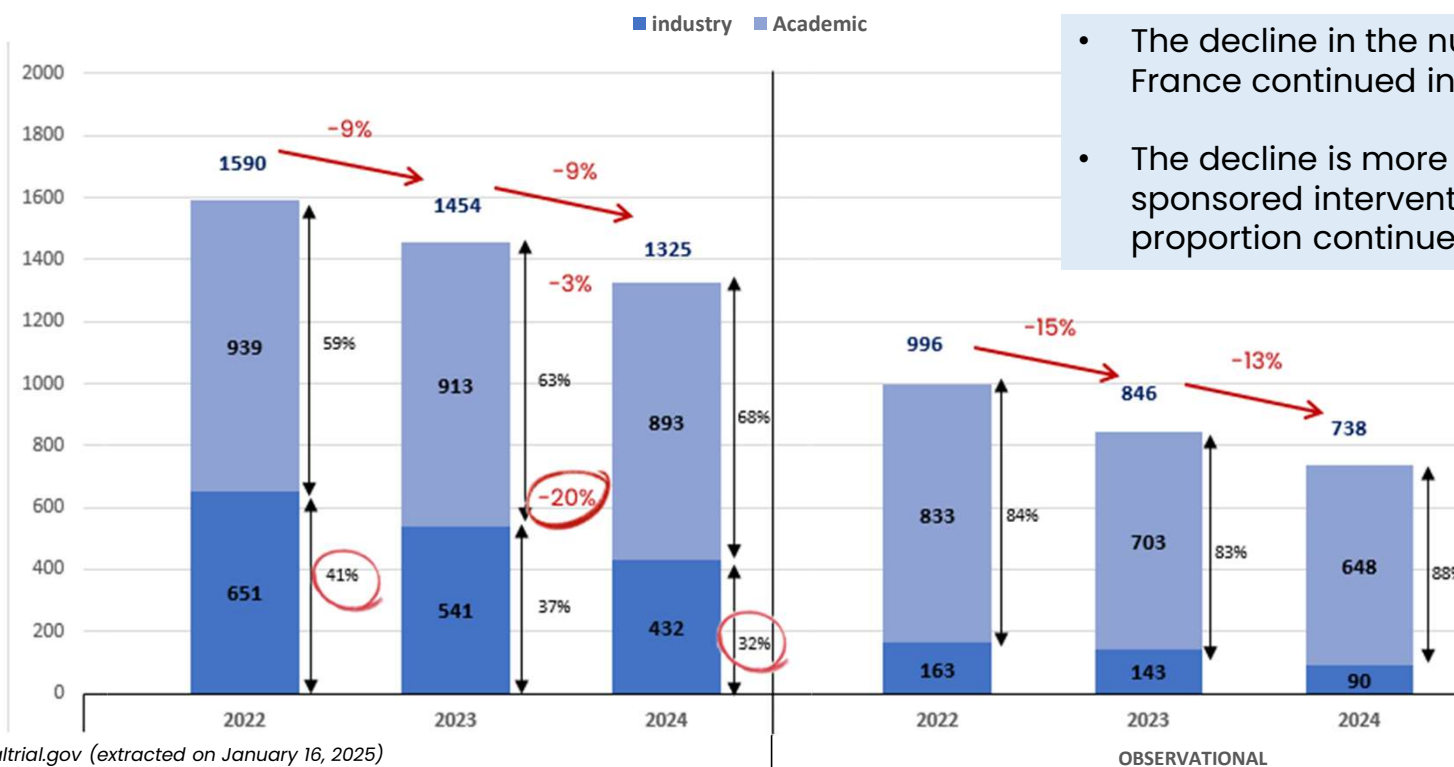
*Adjustment of 2024 results to account for late reporting (studies from 2024 reported in 2025 after data extraction)



Number of studies in France from 2022 to 2024, all categories: Drugs, medical devices, and others Interventional and observational studies



Number of Clinical Studies in France from 2022 to 2024

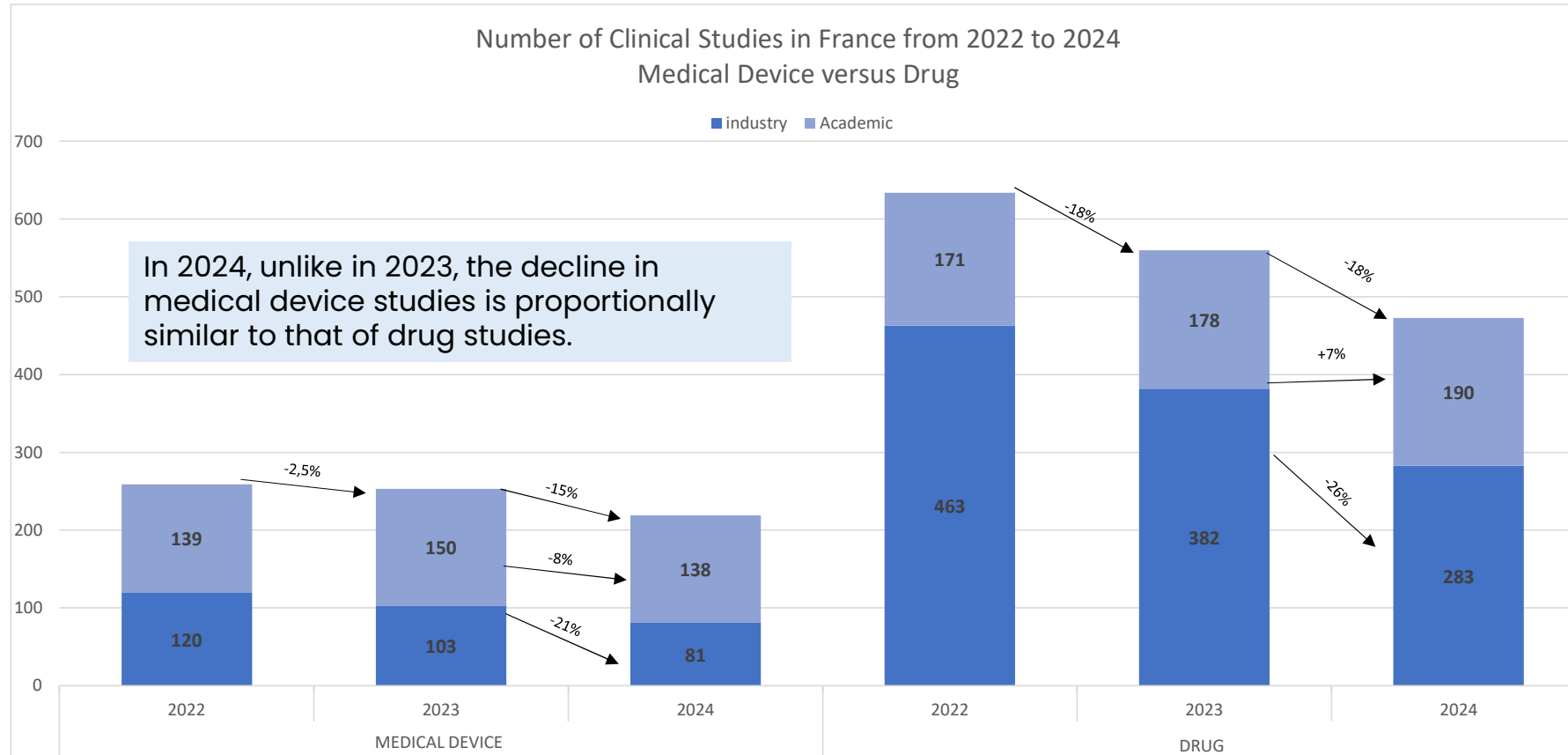


- The decline in the number of studies in France continued in 2024.
- The decline is more significant for industry-sponsored interventional studies, whose proportion continues to decrease each year.

Source: clinicaltrial.gov (extracted on January 16, 2025)

Number of studies in France from 2022 to 2024

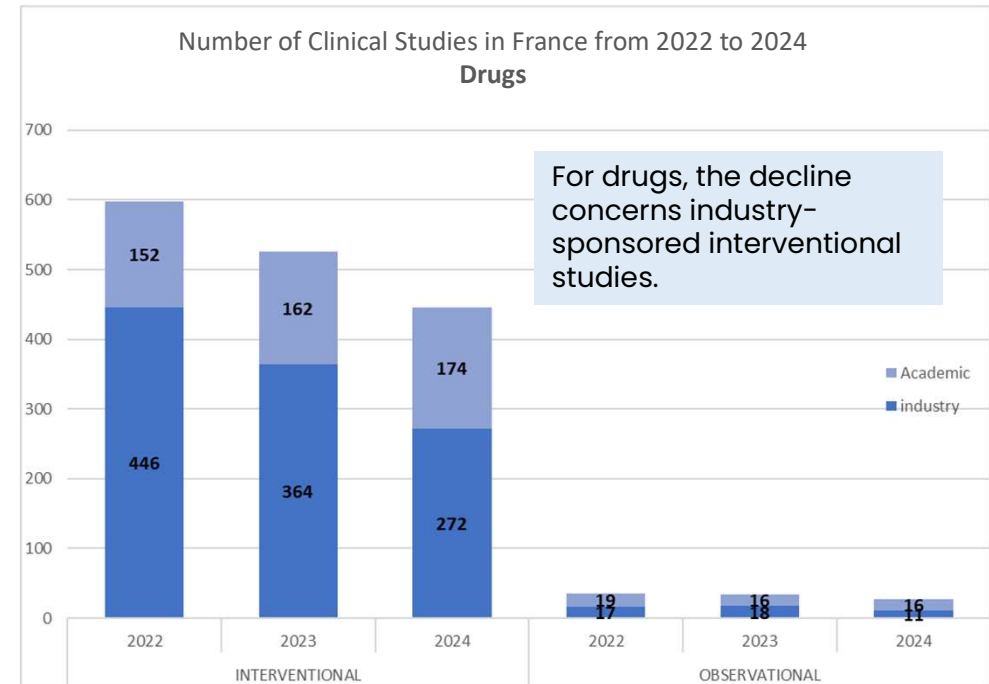
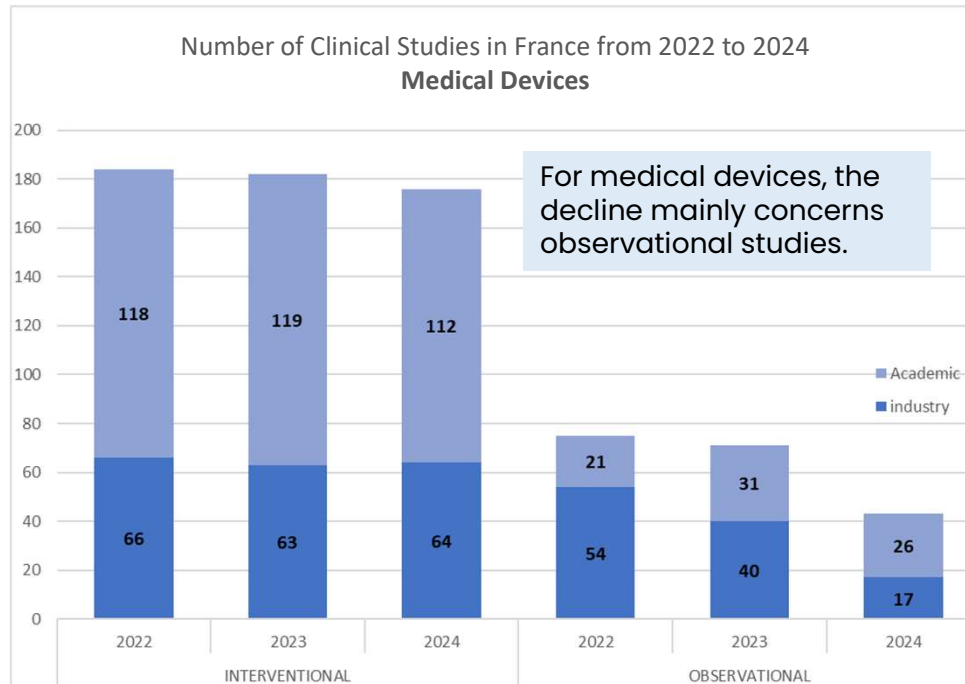
Drugs versus Medical Devices (MD)
Private versus academic sponsors



Source: clinicaltrials.gov (extracted on January 16, 2025)

Number of studies in France 2024

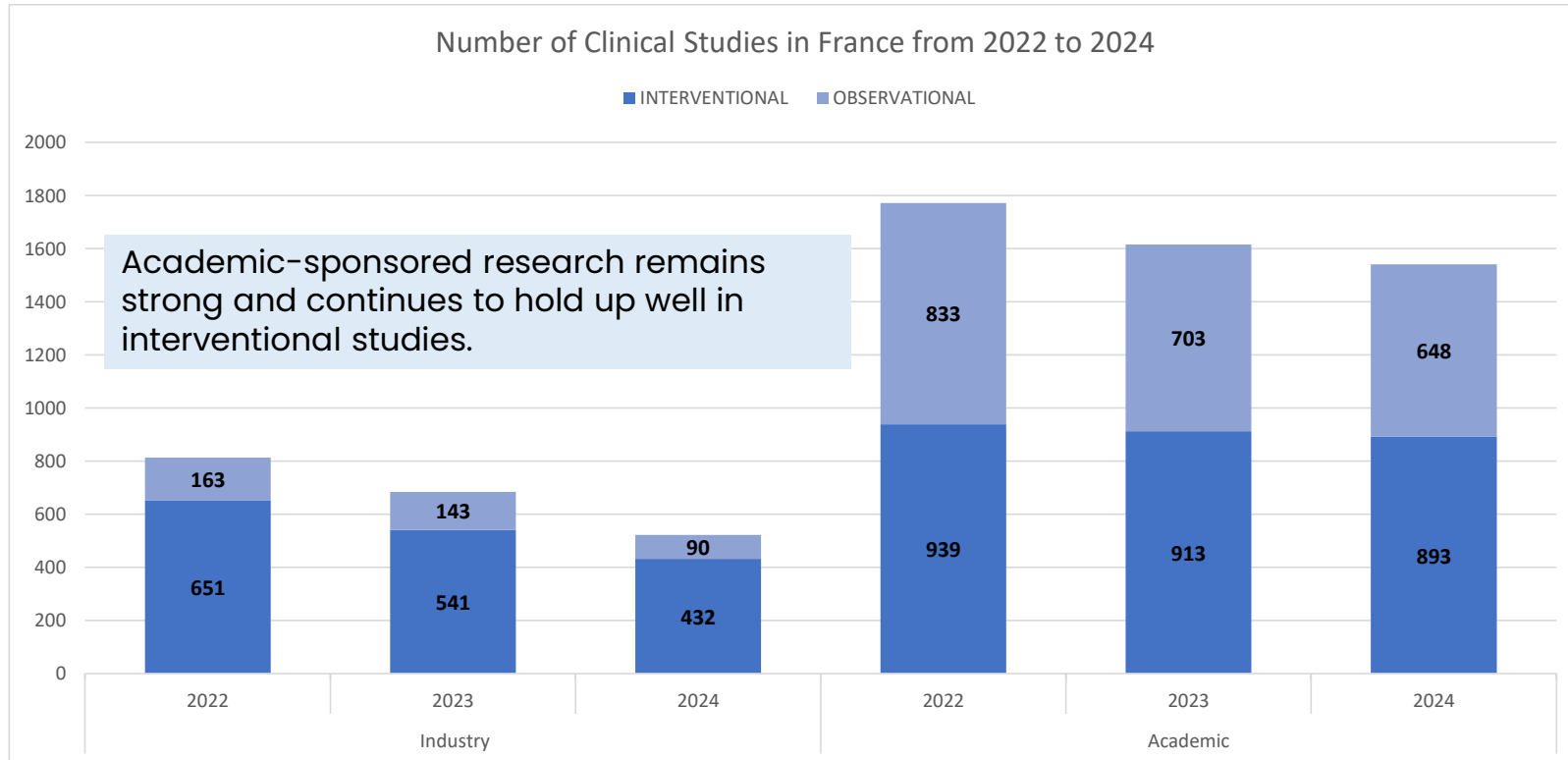
Drugs *versus* Medical Devices (MD) Interventional and observational studies



Source: clinicaltrials.gov (extracted on January 16, 2025)

Number of studies in France 2024

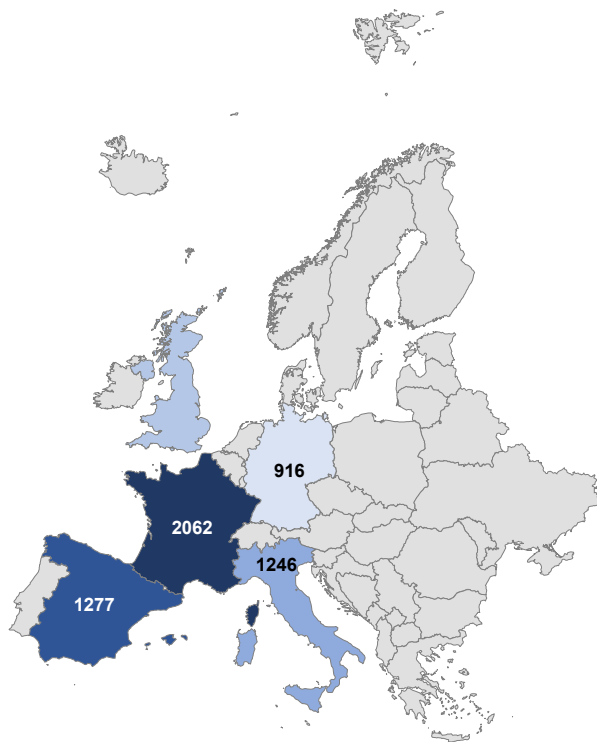
Private versus academic sponsors



Source: clinicaltrials.gov (extracted on January 16, 2025)

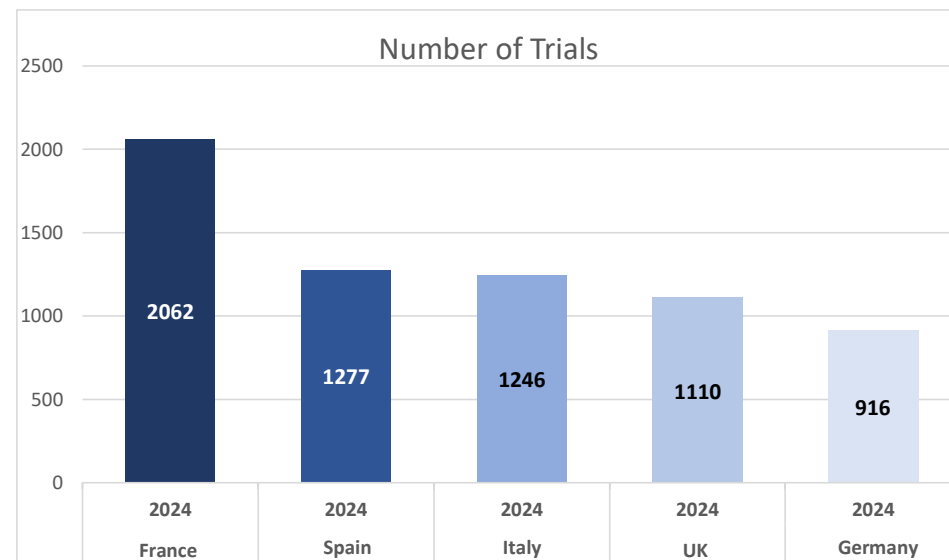
TOP 5 European countries – clinical research

Number of Trials



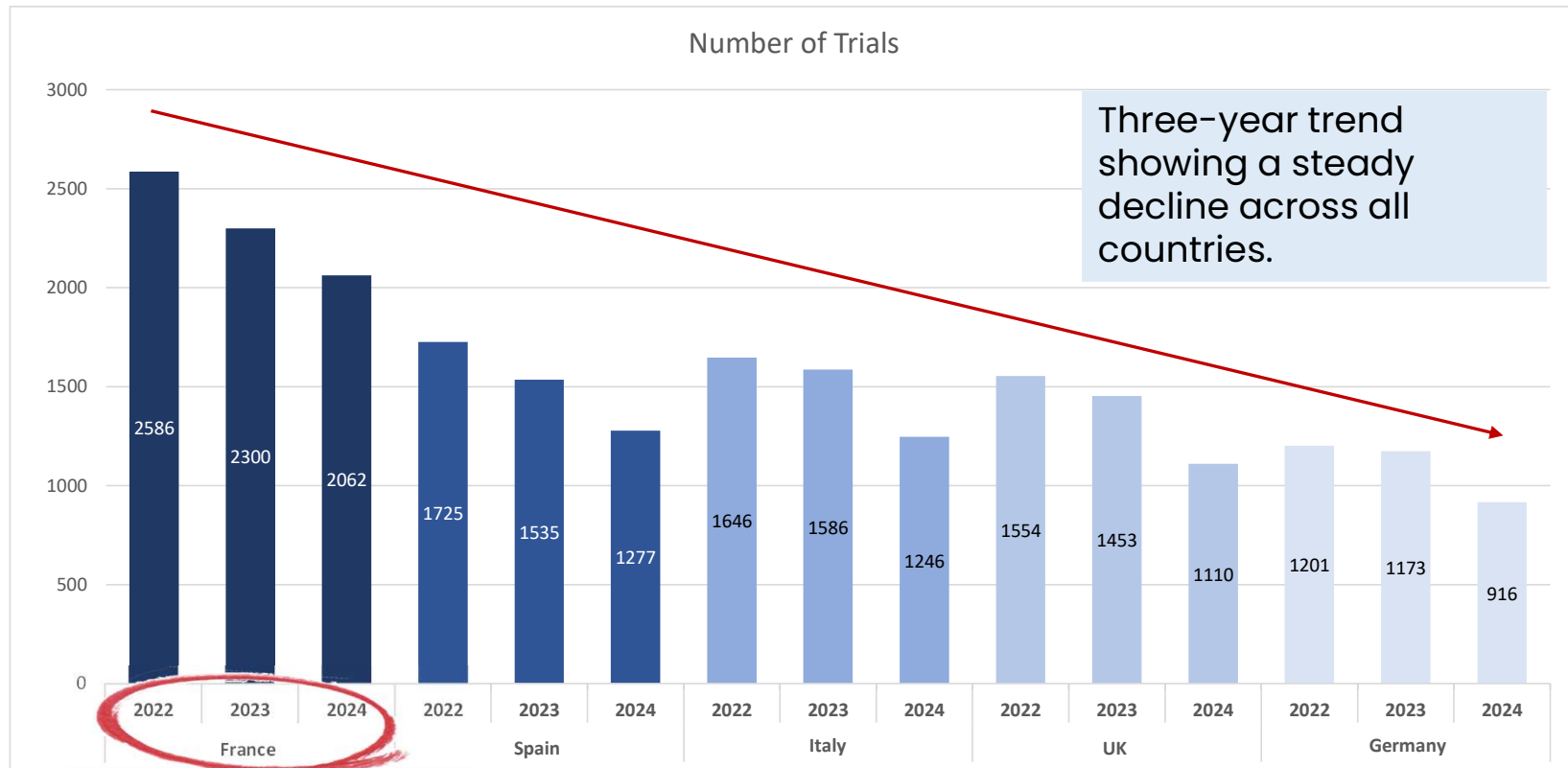
With Bing
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France maintains its top position in Europe across all study types (interventional and observational), all products (drugs, medical devices), or non-product studies (epidemiology), and all sponsorships (private or academic).



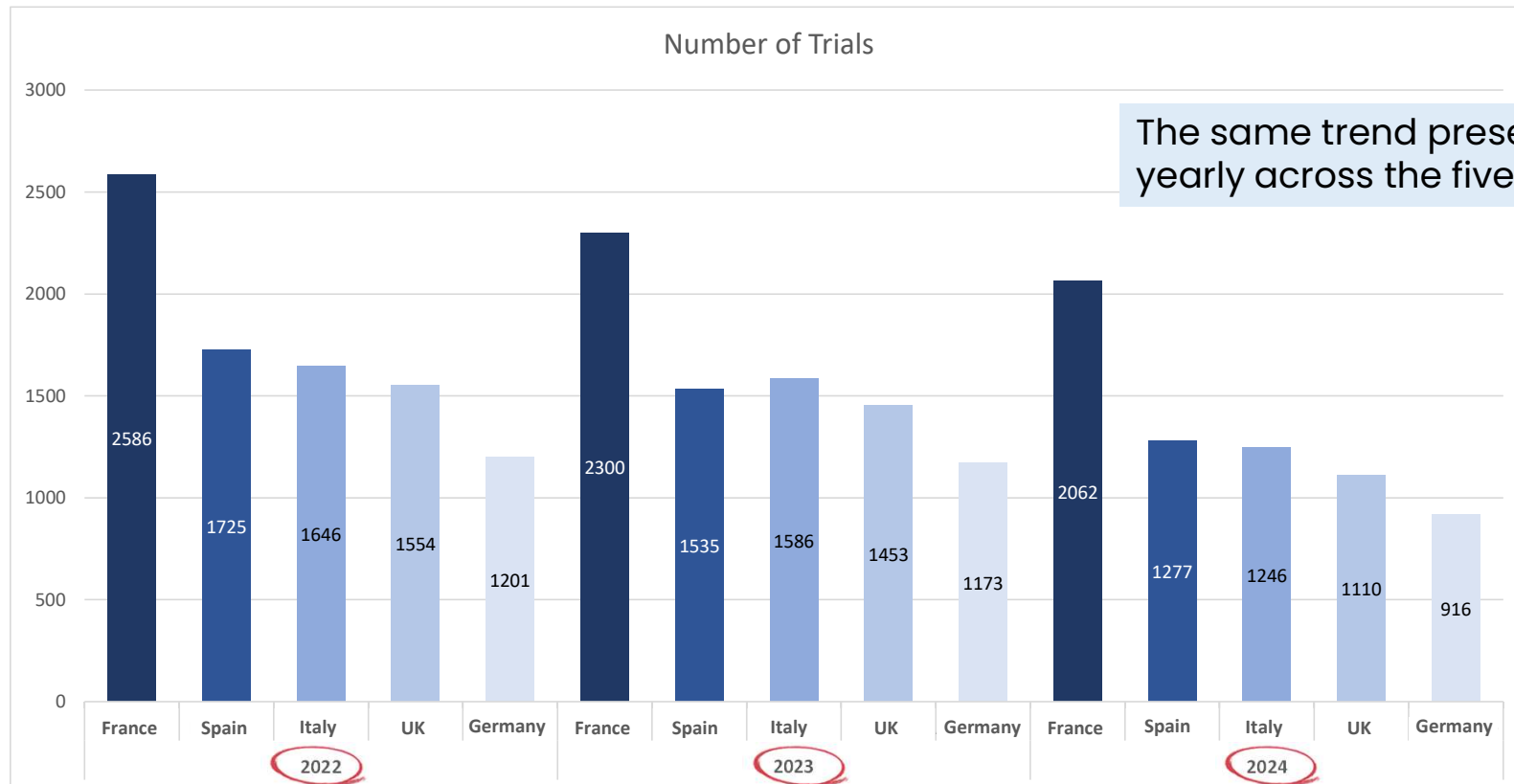
Source: clinicaltrials.gov (extracted on January 16, 2025)

TOP 5 European countries – clinical research



Source: clinicaltrials.gov (extracted on January 16, 2025)

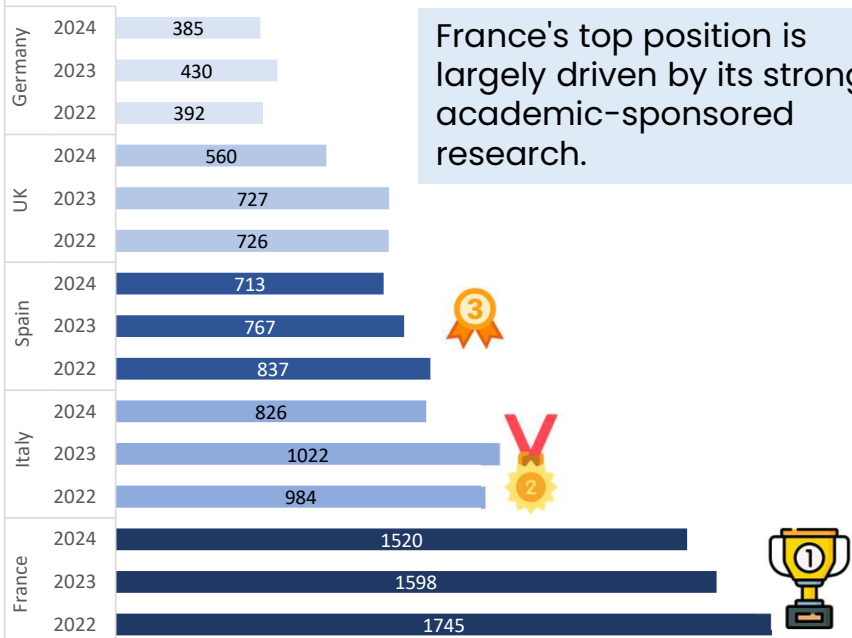
TOP 5 European countries – clinical research



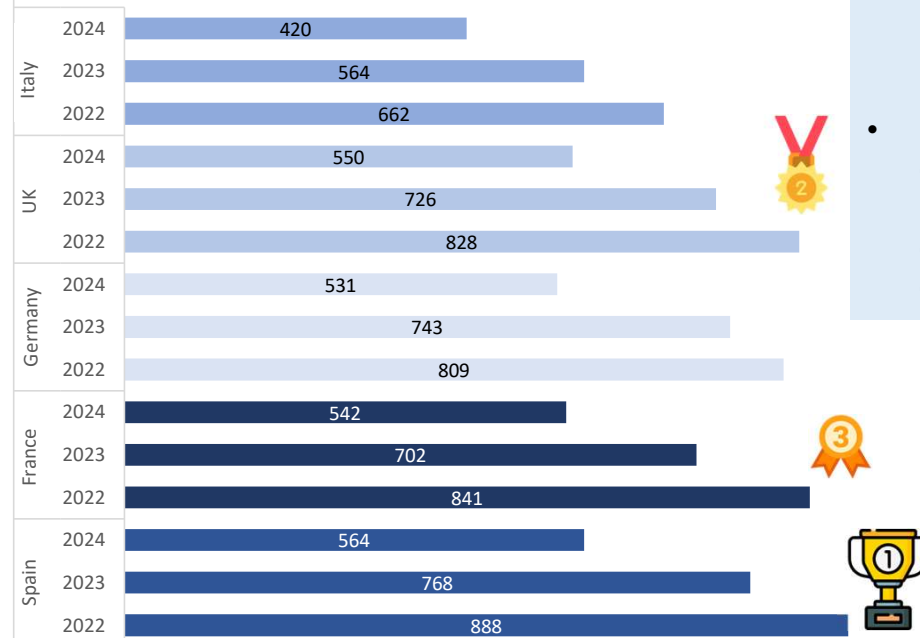
Source: clinicaltrials.gov (extracted on January 16, 2025)

TOP 5 European countries - clinical research

Number of Trials **Academic**



Number of Trials **Industry**

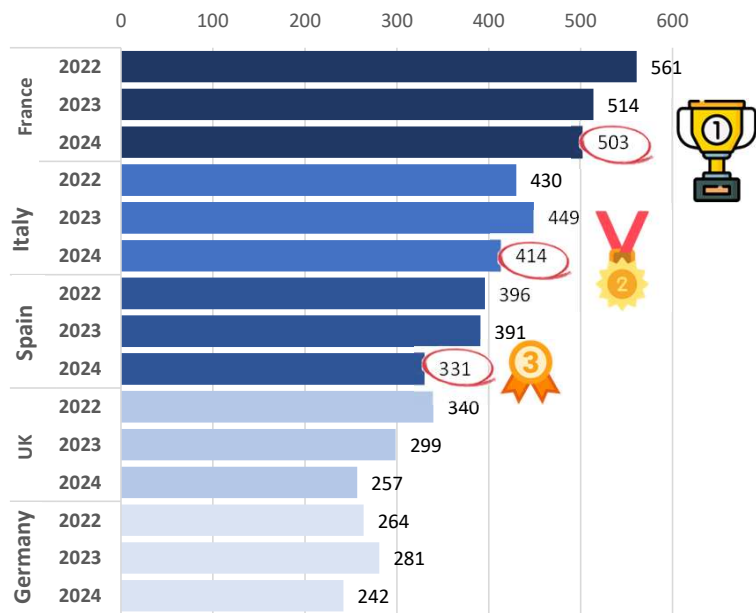


- For industry-sponsored studies, Spain holds the top spot.
- In 2024, Germany dropped two places, losing ground to France and the UK.

Source: clinicaltrials.gov (extracted on January 16, 2025)

Oncology spotlight 2022-2024

Clinical studies in Oncology



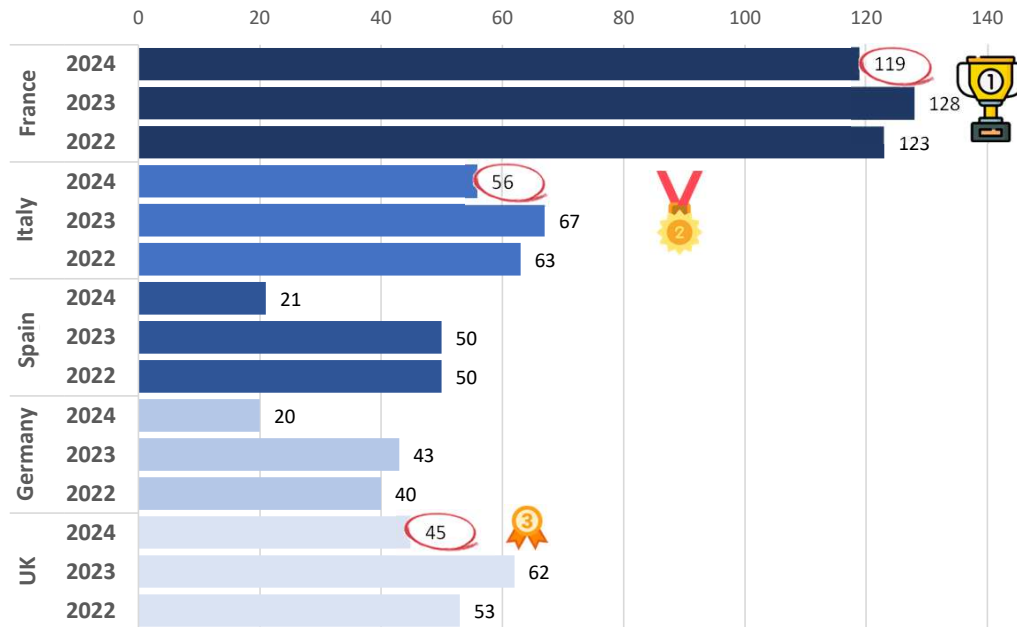
- France remains the **leader in oncology** across all study types, products, and sponsors.
- This position was **reaffirmed in 2024**, marking five consecutive years at the top.



Source: *clinicaltrial.gov* (extracted on January 16, 2025)

Rare diseases spotlight 2022-2024

Rare Diseases 2022 - 2024 (all phases)



- France remains highly active in initiating research across all categories for **rare diseases** and maintains its **leading** position in 2024.
- A decline in research activity was observed across all European countries in 2024.



Source: *clinicaltrial.gov* (extracted on January 16, 2025)

Conclusions

1/2



- In 2024, **clinical research activity in Europe** continued to **decline**, a trend that has been ongoing since the end of the COVID-19 period. This decline affecting all European countries, appears to be benefiting the Asia-Pacific region and the United States. One possible explanation is the implementation of new EU regulations on drugs and medical devices, which require a longer adaptation period than initially expected, combined with increasing competition from other regions worldwide.
- **France** maintains its **leading position in Europe**, primarily due to its **strong academic research activity**, particularly in interventional studies. Industry-sponsored research in France has declined more sharply than academic research. The **decline in medical device** studies (MD) in 2024 is also notable, especially for observational studies, which are becoming less relevant under the stricter requirements of the European Medical Device Regulation and In Vitro Diagnostic Regulations (MDR & IVDR).
- For **oncology** studies, regardless of sponsorship or study type, **France** remains the **leader** in 2024, reinforcing its position for several consecutive years. The same applies to **rare disease** research, where France maintains its leadership position.

Conclusions

2/2



- In Europe, for **industry-sponsored** studies, **Germany** experienced a **relatively greater decline** in 2024 compared to other countries, **losing a rank to France** and the United Kingdom.
Spain has strengthened its position as the **European leader** in these studies, with a shift in clinical trial initiations from Northern and Western Europe to Southern Europe, particularly Spain, Portugal, and Greece.
- To improve its ranking in industry-sponsored studies, France should take **inspiration from Southern European countries**, especially Spain, which has successfully adapted by ensuring the **rapid setup of trials**. This includes **shorter authorization timelines**, **faster site openings**, and quicker patient enrollment.

→ This is the **best path to success**.