

RESEARCH NOTE

ONCOLOGY CLINICAL TRIALS: CANADA WITHIN THE INTERNATIONAL CONTEXT

November 15, 2021

KEY POINTS

Oncology is a major therapeutic area with significant investment in clinical trials (CTs) over the past decade. Oncology trials account for approximately a quarter of worldwide clinical trials initiated annually, although the share is higher in North America (roughly one-third) and in the Asia-Pacific region (almost 30%).¹ Canada has historically ranked well among peer countries in terms of oncology clinical trials initiated – roughly 30% of CTs initiated annually are oncology trials, and these trials make up 36% of ongoing CTs in Canada.² However, while the number of oncology CTs initiated in Canada has been relatively steady over the past decade, its share of worldwide oncology trials initiated has recently decreased from 8.2% in 2014 to 4.9% in 2020. Given that CTs provide Canadian patients with earlier access to new cancer treatments, there is a clear need to position and grow Canada's role as an attractive destination for investment. Unfortunately, the pending changes to the Patented Medicine Prices Review Board's regulations (PMPRB) will increase regulatory burdens and uncertainty, thus having the opposite effect.

ONCOLOGY TRIALS BY THE NUMBERS

- There were 229 oncology CTs initiated in Canada in 2020, 261 initiated in 2015, and 218 initiated in 2010 (see Chart 1)
 - However, the global share of oncology CTs initiated in Canada began steadily declining from 8.2% in 2014 to 4.9% in 2020.
- Most of the oncology CTs initiated in Canada were multinational trials, and this share has increased over the past decade (see Chart 2):
 - 79% of trials initiated in 2020 also had US sites, and roughly half also had sites in EU countries (ranging from 57% in Spain to 39% in Belgium).
- Internationally, the number of oncology clinical trials initiated increased significantly from 3,022 in 2010 to 3,265 in 2015, and 4,659 in 2020.
 - The number of oncology CTs initiated in the Asia-Pacific region increased significantly from 1,120 in 2010 to 1,368 in 2015, and 2,797 in 2020 (see Chart 3):
 - China accounted for much of the increase in oncology CTs in Asia-Pacific, increasing from 204 oncology CTs initiated in 2010 to 537 in 2015, and 1,972 in 2020 (see Chart 4); meanwhile the number of trials initiated in Japan decreased from 626 in 2010 to 191 in 2020, and the number of trials initiated in South Korea increased from 173 in 2010 to 306 in 2020.

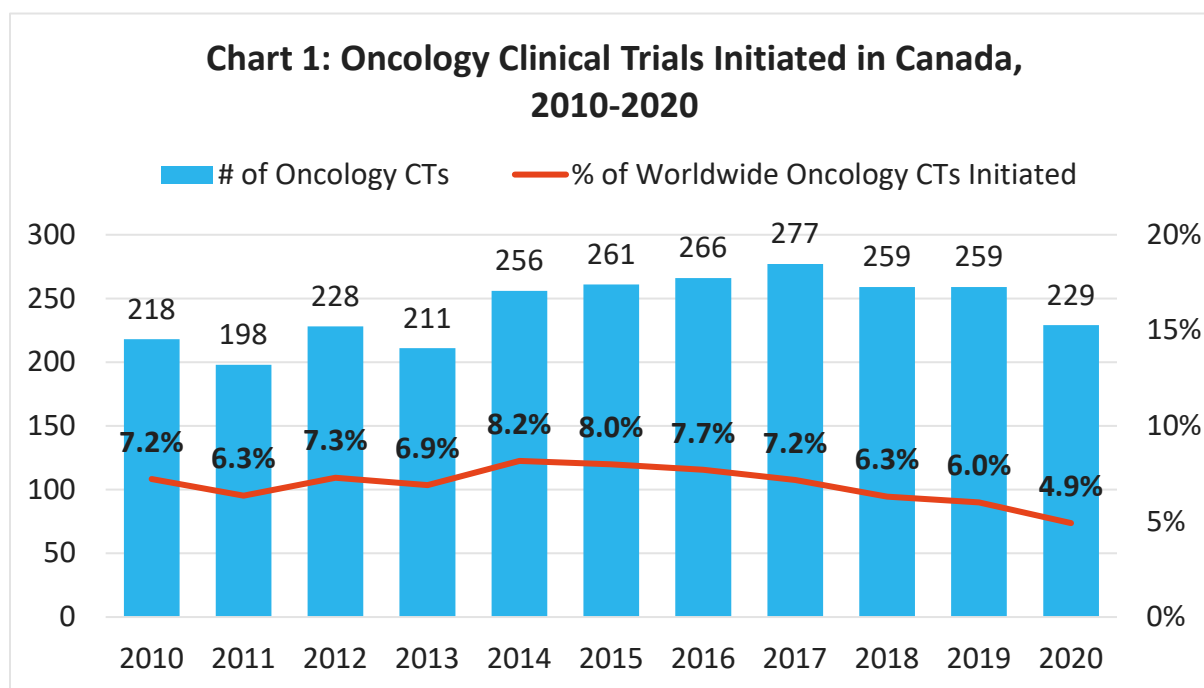
¹ GlobalData, Trials Intelligence Database. Accessed September 14, 2021.

² Innovative Medicines Canada (May 20, 2021). [Clinical Trials in Canada: A Pandemic Snapshot](#).



- Meanwhile, the number of oncology CTs initiated in North America increased from 1,349 in 2010 to 1,470 in 2015, and 1,526 in 2020.
- The number of oncology CTs initiated in Europe was relatively constant, from 838 in 2010 to 973 in 2015, and 913 in 2020.

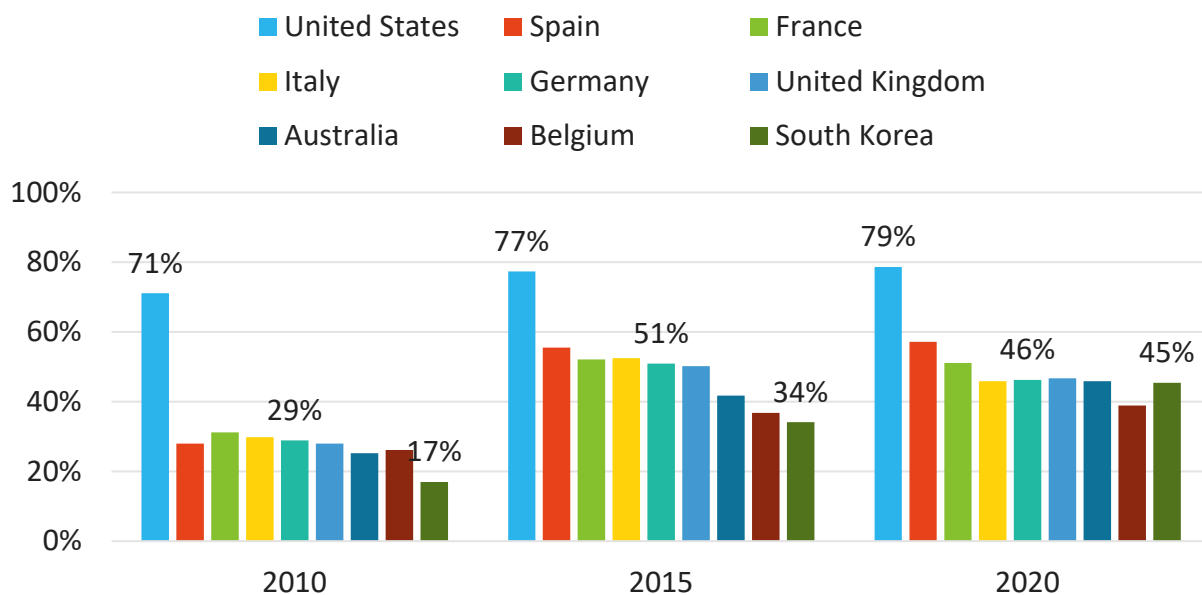
DATA CHARTS



Source: GlobalData Trials Intelligence.

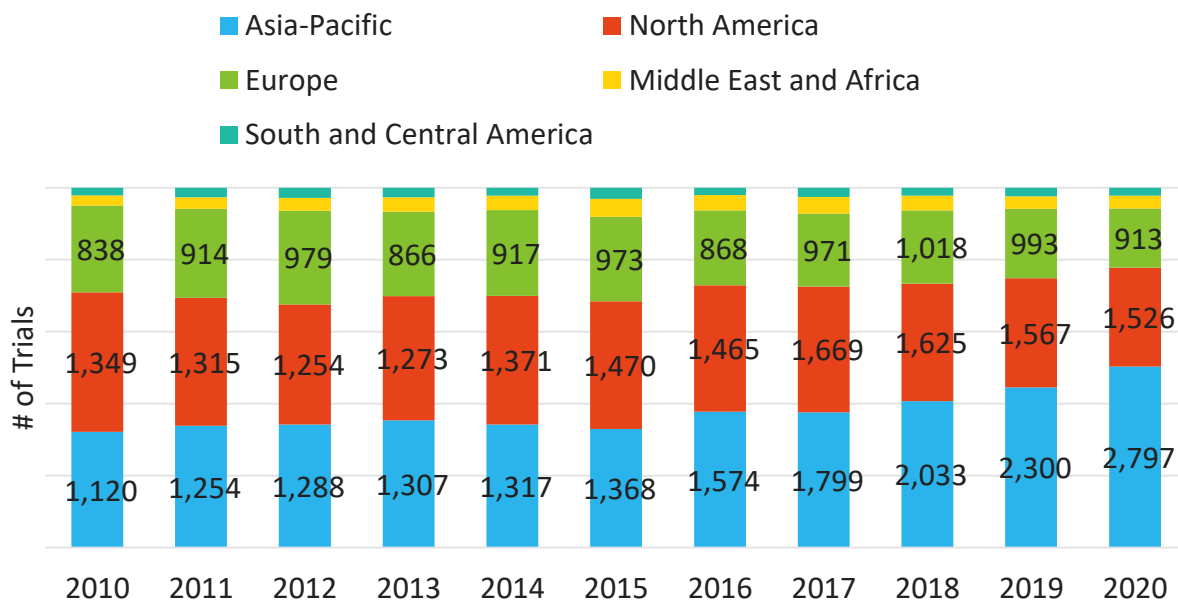


Chart 2: Share of Multinational Oncology Clinical Trials in Canada



Source: GlobalData Trials Intelligence.

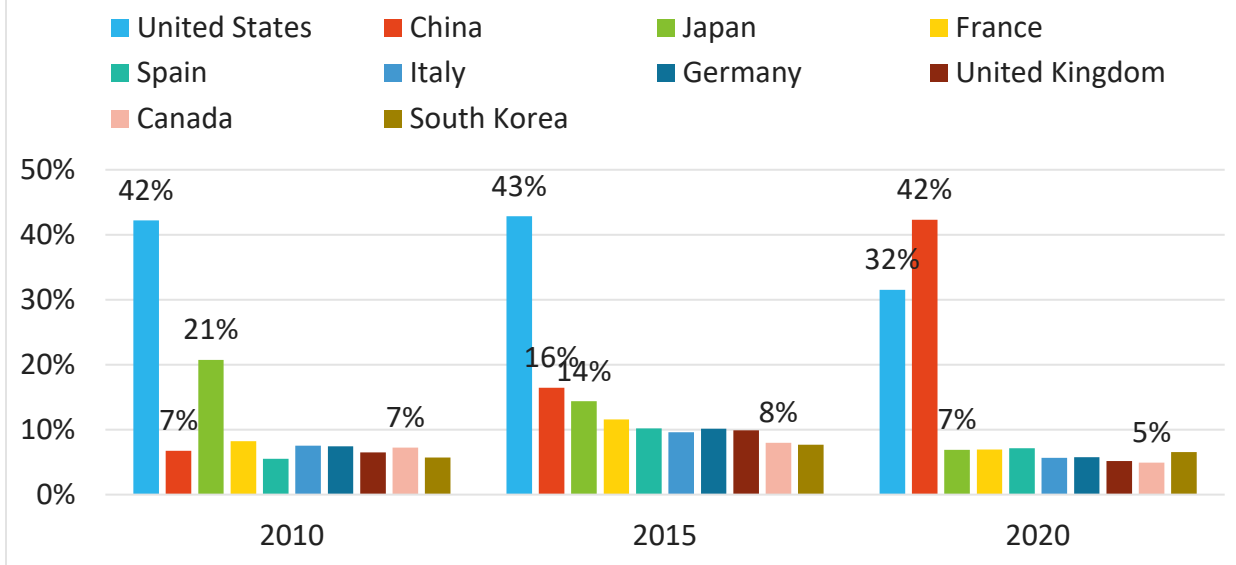
Chart 3: Oncology Clinical Trials Initiated Worldwide



Source: GlobalData Trials Intelligence. Total adds up to more than worldwide count of unique trials due to some trials having multiple sites in multiple regions.



Chart 4: Share of Worldwide Oncology Clinical Trials Initiated, by Country



Source: GlobalData Trials Intelligence.