

Clinical research in France – Key figures

2026 Barometer



Introduction, methodology

- **Scope:** all type of products (medical devices, drugs), all types of phases (interventional, non-interventional), all types of sponsor (academic, industrial)
- **Source of data:** Clinicaltrial.gov database
- **Methodology:**
 - ✓ **Adjusted*** data for 2025 records in France.
 - ✓ The comparisons between **major European countries** were not adjusted, so interpretation should rather be **based on rankings**.

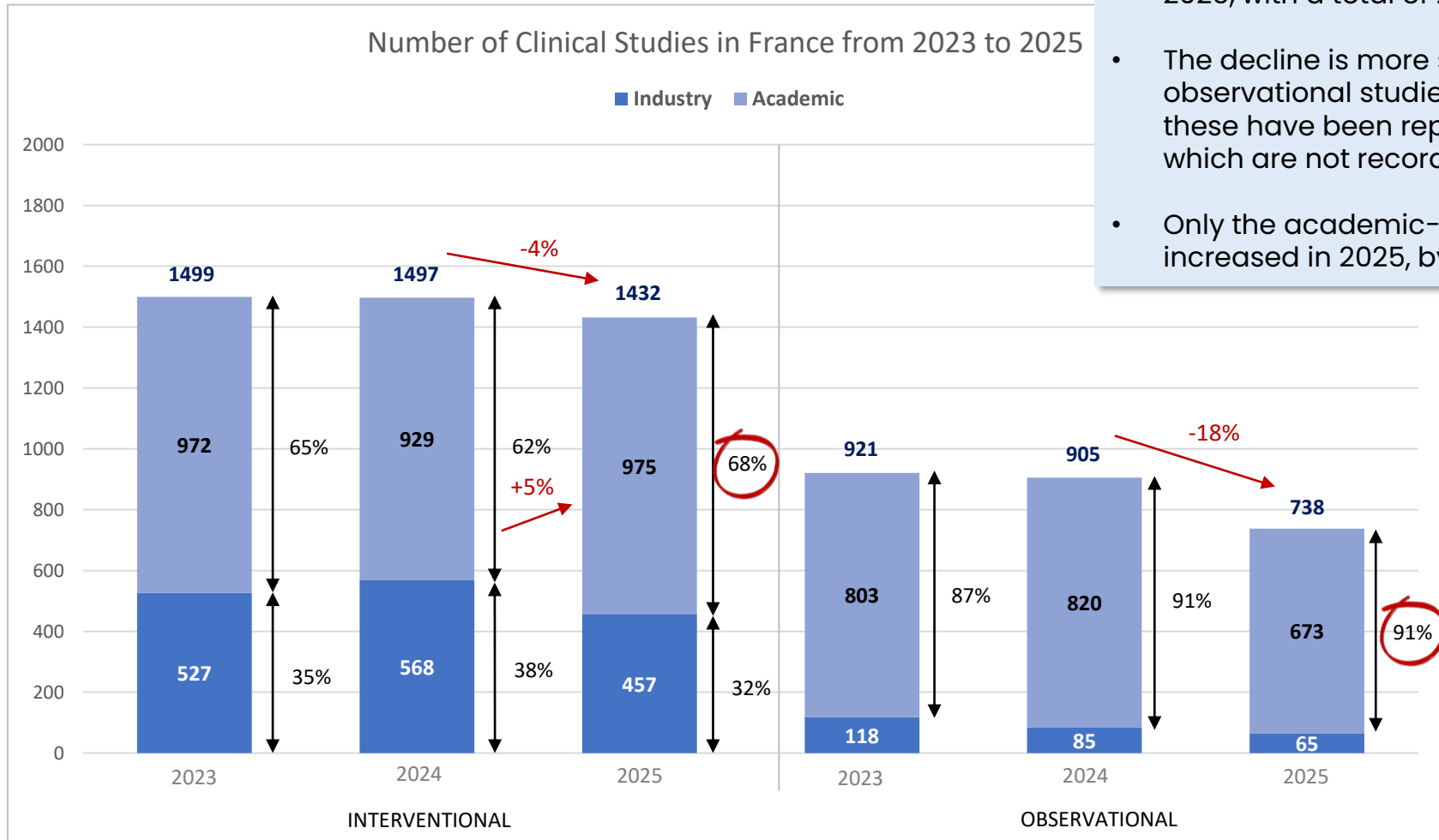
*Adjustment of 2025 results to account for late reporting (studies from 2025 reported in 2026 after data extraction) The 2025 figures have been adjusted upwards to ensure they are comparable with previous years, for which full data is available.



Number of studies in France from 2023 to 2025, all categories: Drugs, medical devices, and others Interventional and observational studies



- The decline in the number of studies in France continued in 2025, with a total of 2170 (2402 in 2024).
- The decline is more significant for academic-sponsored observational studies, with a decrease of 18%. Portion of these have been replaced by Health Data Hub studies, which are not recorded in Clinicaltrial.gov
- Only the academic-sponsored interventional studies increased in 2025, by 5%.

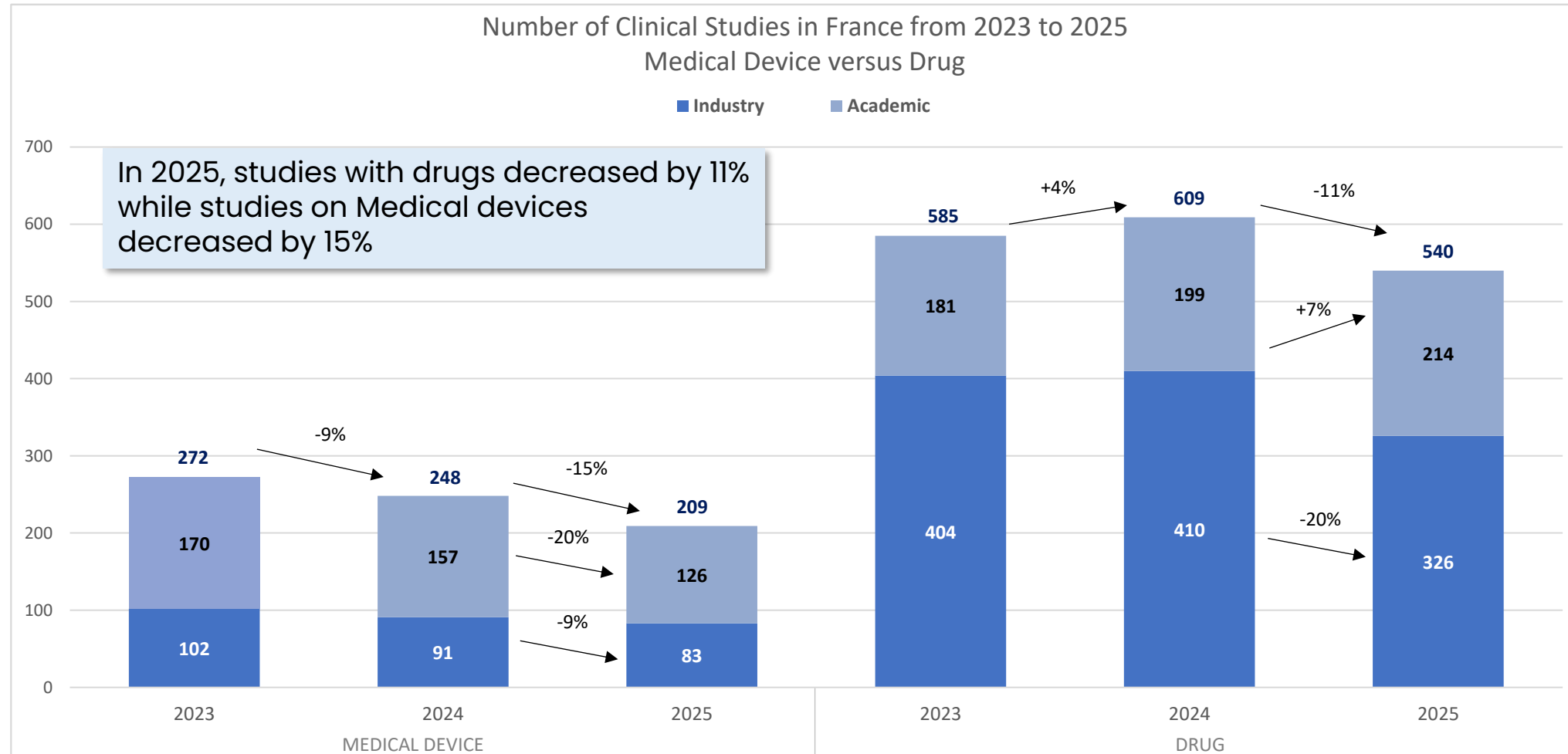


Source: clinicaltrial.gov (extracted on March 16, 2026)

Number of studies in France from 2023 to 2025

Drugs *versus* Medical Devices (MD)

Industry *versus* academic sponsors

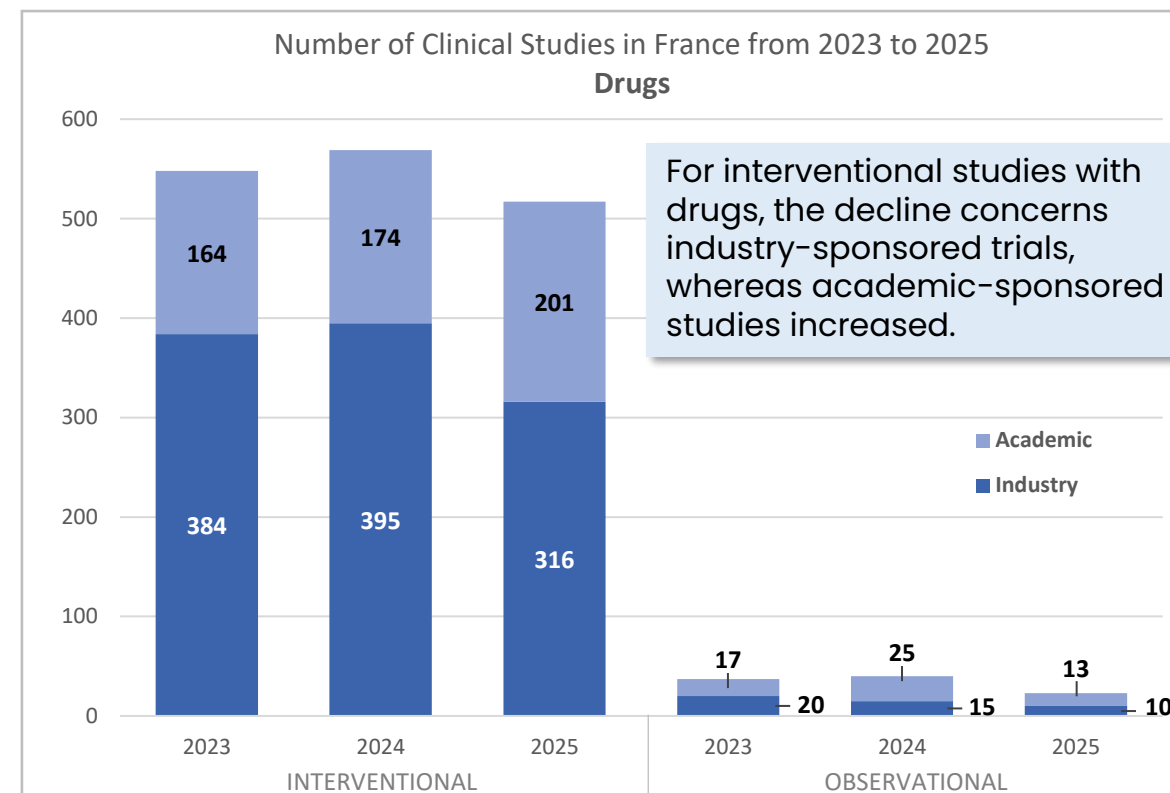
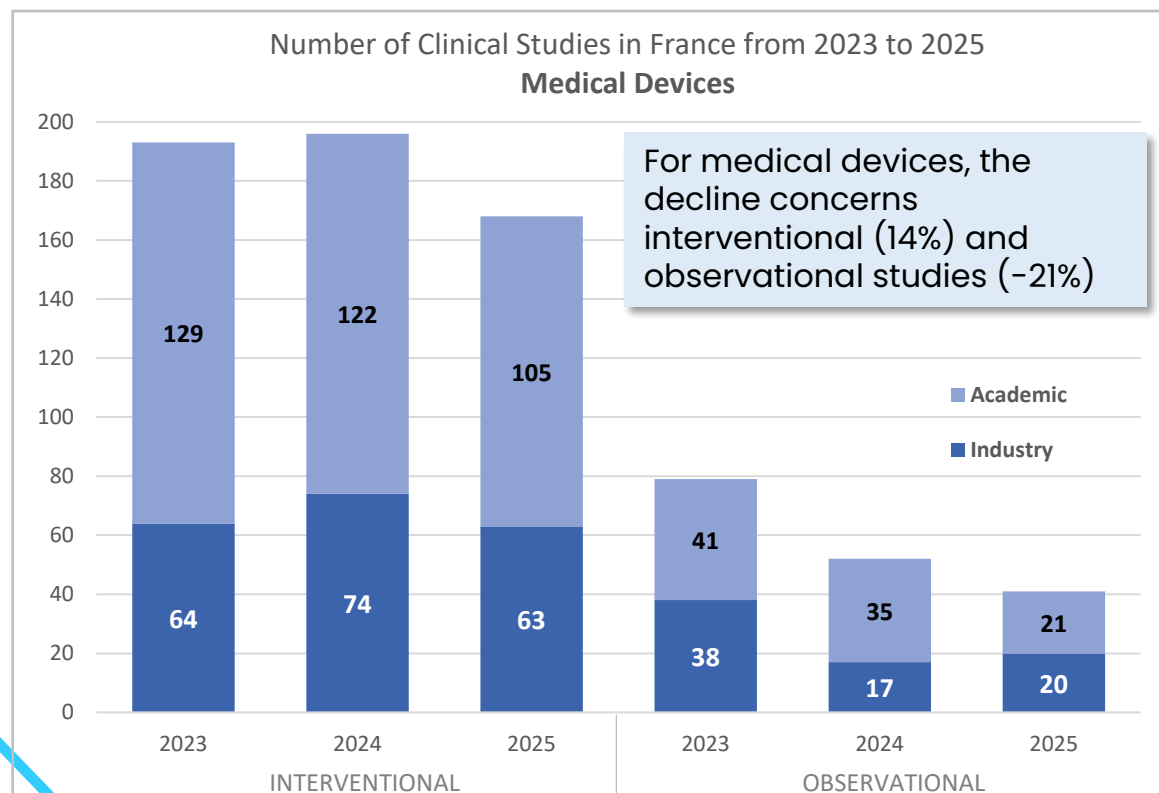


Source: clinicaltrial.gov (extracted on March 16, 2026)

Number of studies in France 2025

Drugs *versus* Medical Devices (MD)

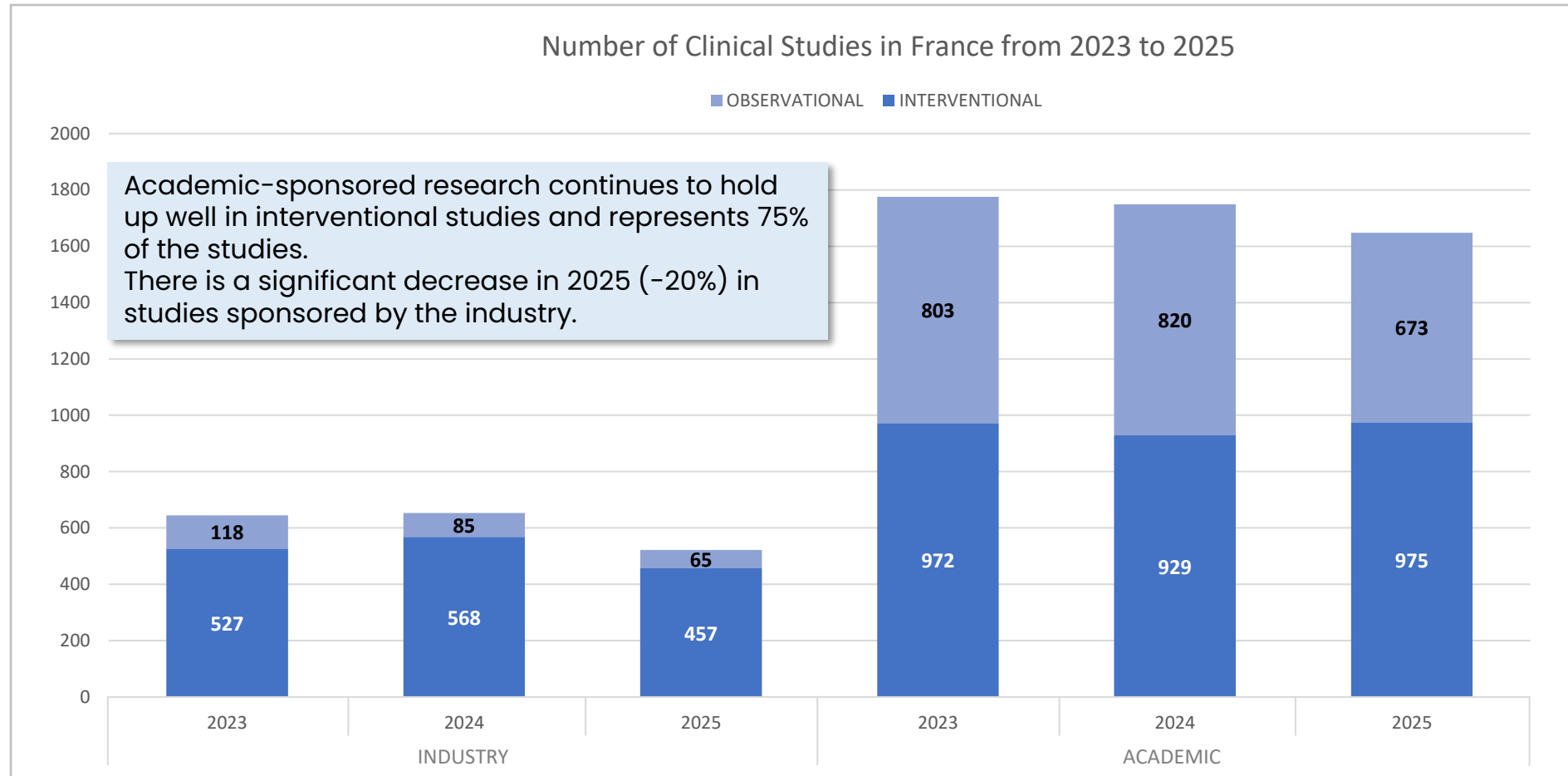
Interventional *versus* observational studies



Source: *clinicaltrial.gov* (extracted on March 16, 2026)

Number of studies in France 2025

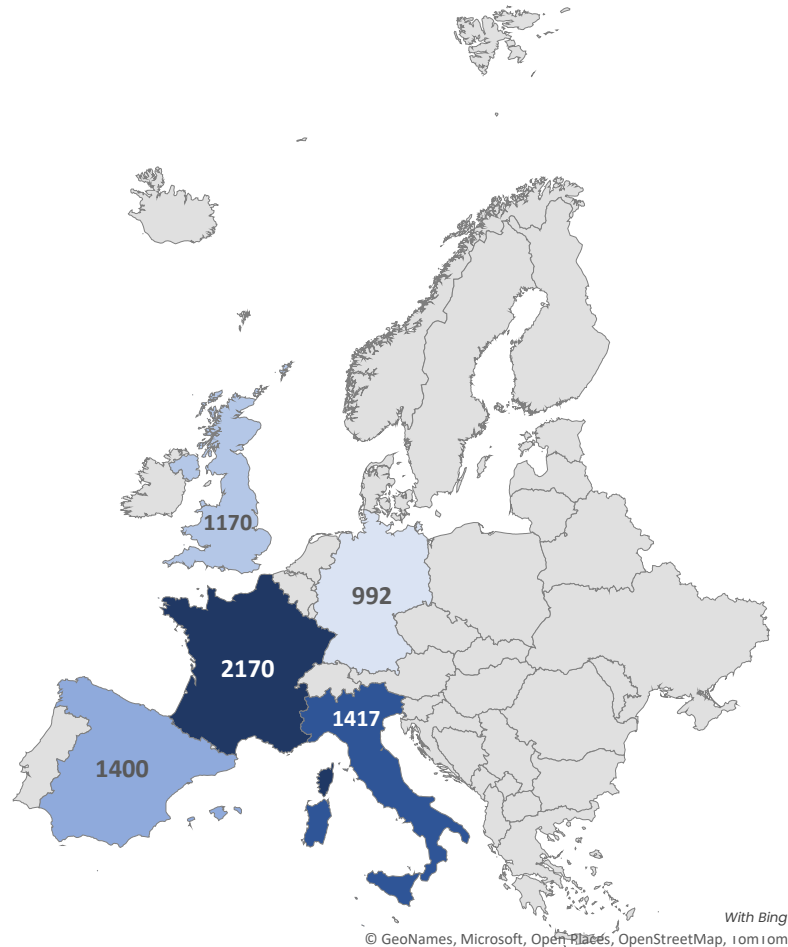
Private (industry) *versus* academic sponsors



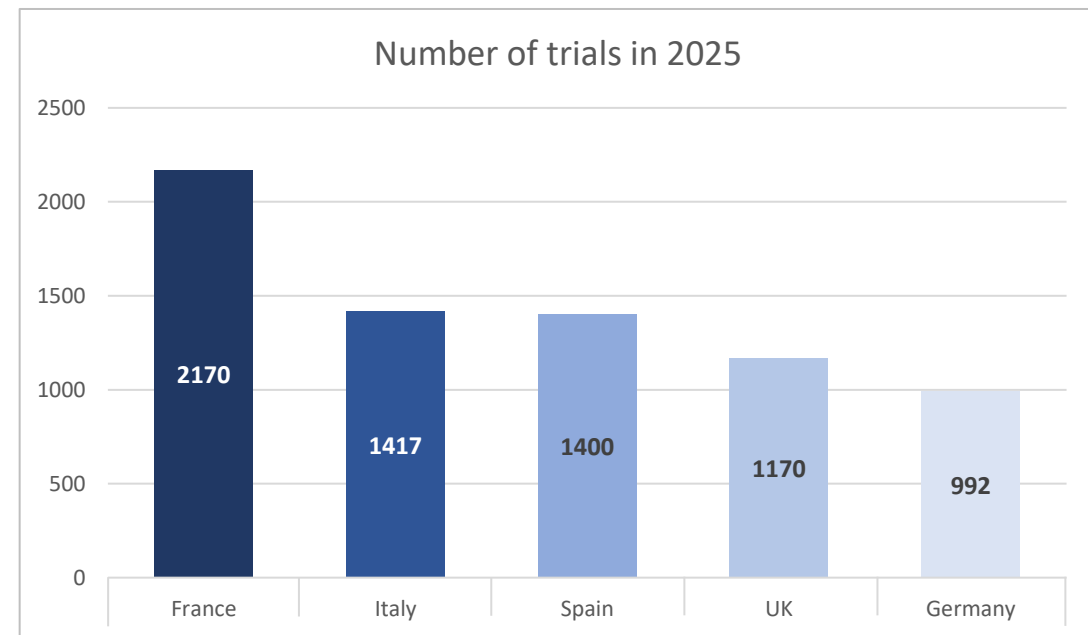
Source: clinicaltrials.gov (extracted on March 16, 2026)

TOP 5 European countries – clinical research

Number of trials in 2025



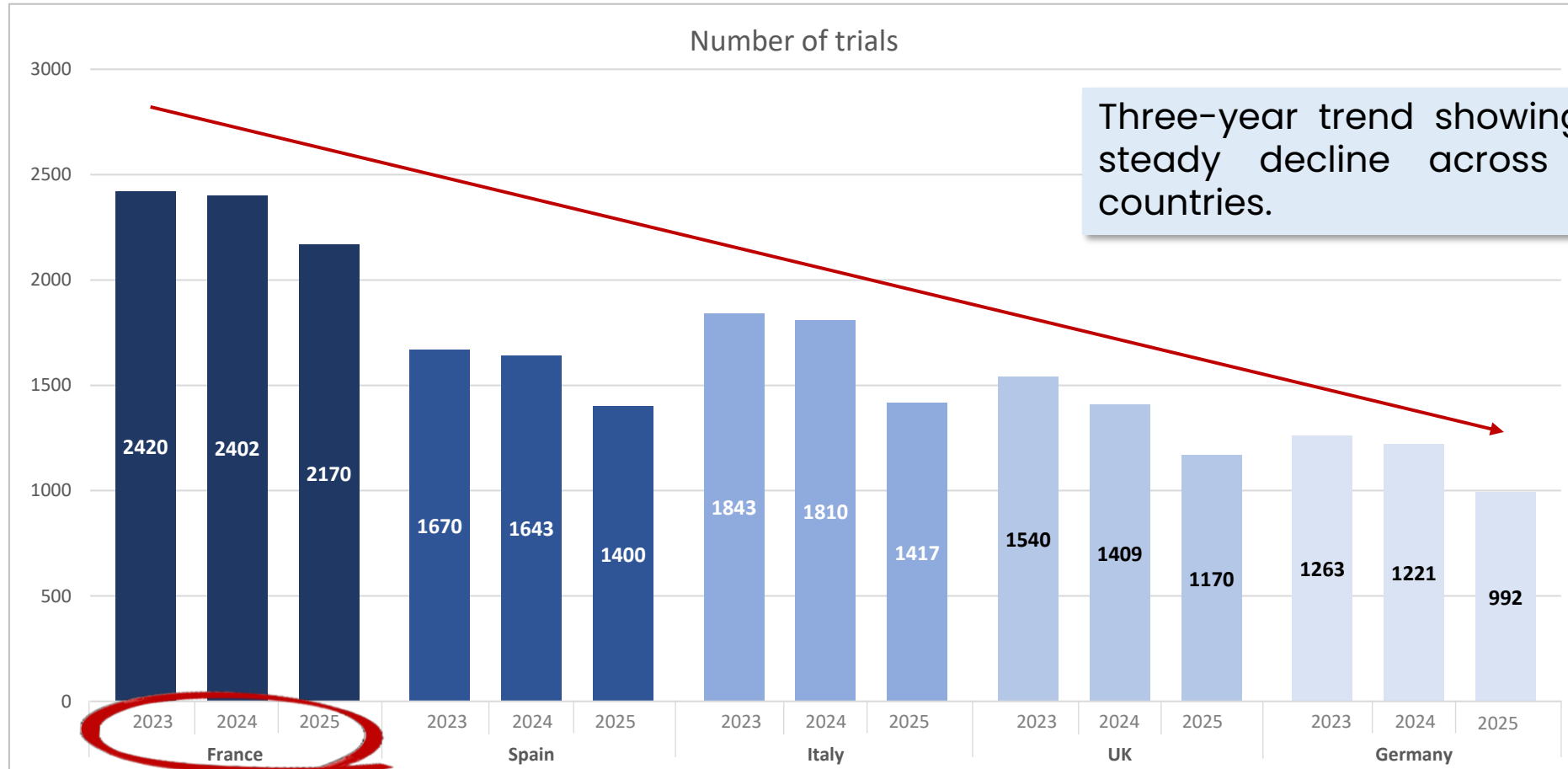
France maintains its top position in Europe across all study types (interventional and observational), all products (drugs, medical devices), or non-product studies (epidemiology), and all sponsorships (private or academic).



Source: clinicaltrials.gov (extracted on March 16, 2026)

Note: 2025 figures are not adjusted for late reporting and are therefore under-reported; cross-country 2025 values should be interpreted by rank, not in absolute terms.

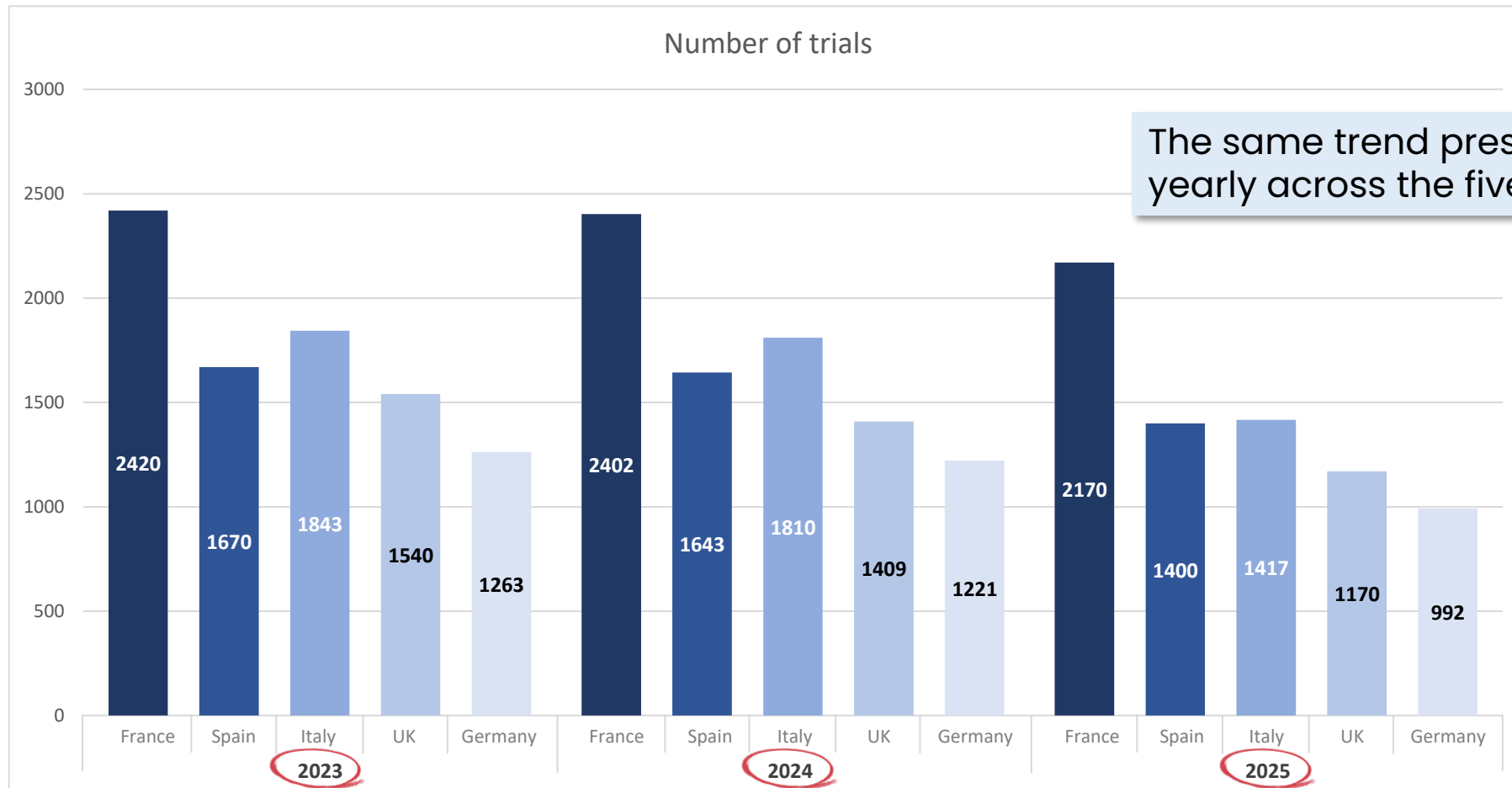
TOP 5 European countries - clinical research



Source: clinicaltrials.gov (extracted on March 16, 2026)

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TOP 5 European countries - clinical research

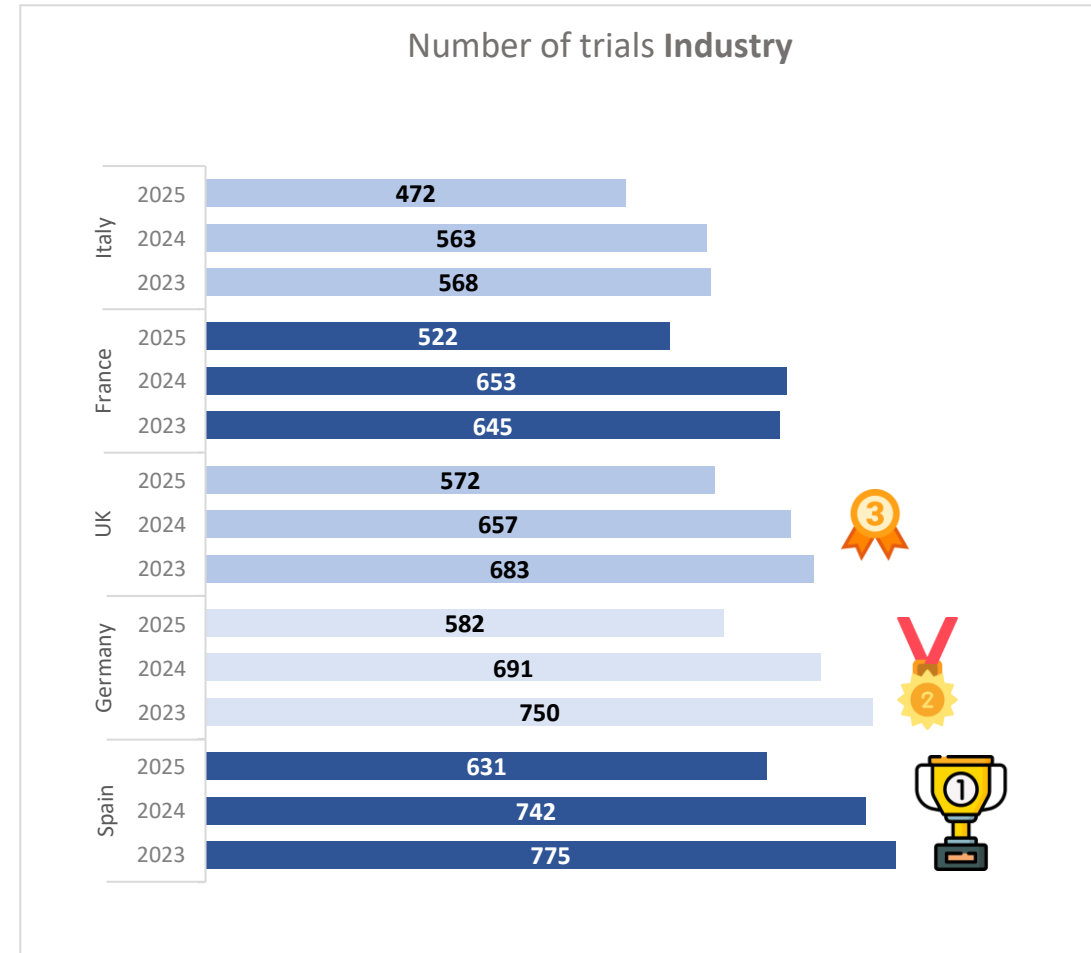


Source: clinicaltrials.gov (extracted on March 16, 2026)

Note: 2025 figures are not adjusted for late reporting and are therefore under-reported; cross-country 2025 values should be interpreted by rank, not in absolute terms.

TOP 5 European countries – industrial clinical research

For industry-sponsored studies, Spain holds the top spot three years in a row, followed by Germany and UK.

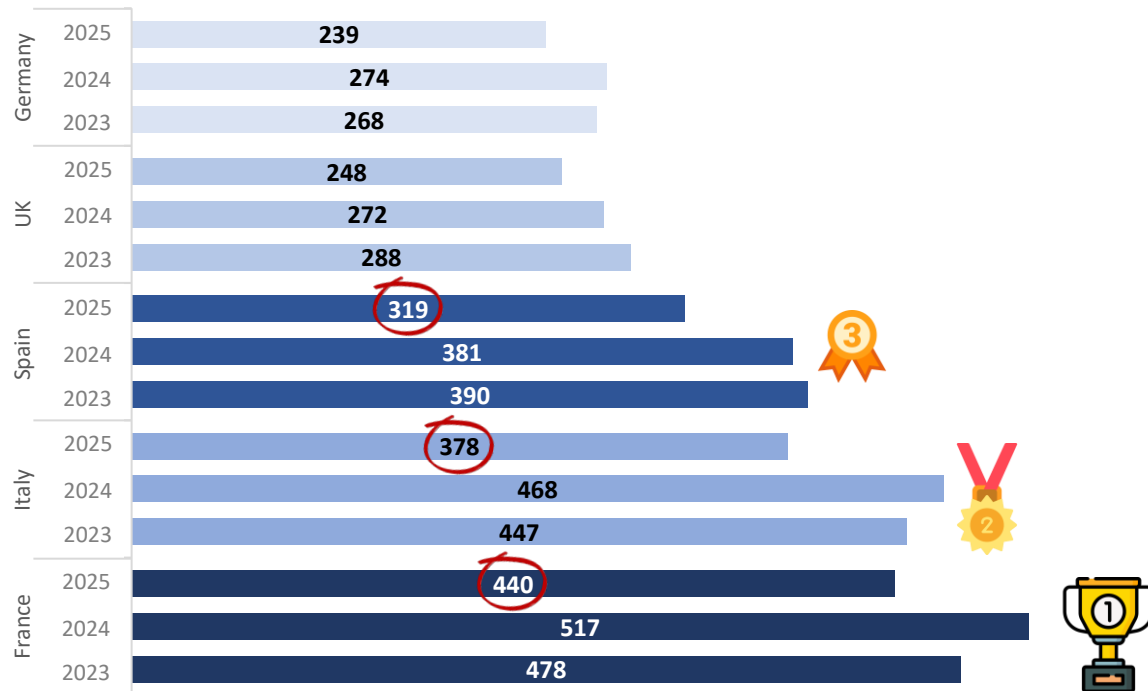


Note: 2025 figures are not adjusted for late reporting and are therefore under-reported; cross-country 2025 values should be interpreted by rank, not in absolute terms.

Source: clinicaltrials.gov (extracted on March 16, 2026)

Oncology spotlight 2023–2025

Clinical studies in Oncology (all phases)



Source: clinicaltrials.gov (extracted on March 16, 2026)

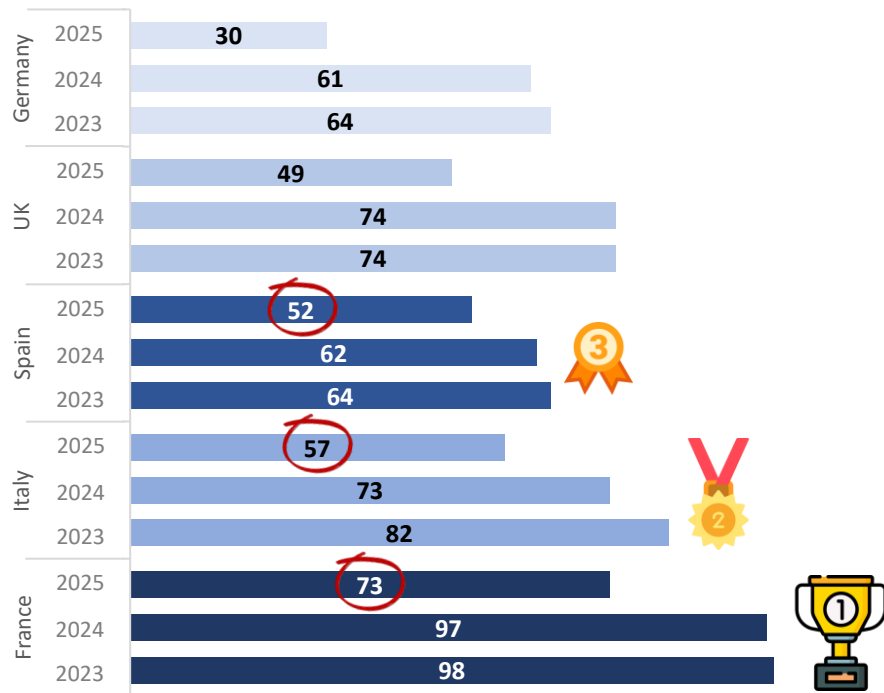
Note: 2025 figures are not adjusted for late reporting and are therefore under-reported; cross-country 2025 values should be interpreted by rank, not in absolute terms.

- France remains the **leader** in **oncology** across all study types, products, and sponsors.
- This position was **reaffirmed in 2025**, marking six consecutive years at the top.



Rare diseases spotlight 2023–2025

Rare Diseases clinical studies (all phases)



Source: clinicaltrials.gov (extracted on March 16, 2026)

- France remains highly active in initiating research across all categories for **rare diseases** and maintains its **leading** position in 2025.
- A decline in research activity was observed across all European countries in 2025.



Note: 2025 figures are not adjusted for late reporting and are therefore under-reported; cross-country 2025 values should be interpreted by rank, not in absolute terms.

Conclusions 1/2



- In 2025, **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 (MD) studies in 2025** 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 2025, 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, The ranking has remained stable over the three years: Spain leads the way, ahead of Germany, the United Kingdom and France. In 2024 , **Germany** experienced a **relatively sharper decline** than its neighbours, narrowing its lead, but it retains its second place; France remains in fourth place, close behind the United Kingdom.

Spain has consolidated its position as the European leader in this segment, against a backdrop of clinical trial launches shifting from Northern and Western Europe to Southern Europe, particularly Spain, Portugal and Greece.

- For industrial promotion and intra-European competition, the most effective lever in the short term lies in initiatives ensuring faster trial implementation: **shorter authorization delays, quicker opening of sites and faster patient enrolment**. These are the measures best placed to restore France to its former standing – and this needs to be made known. In this regard, the **Fast-track initiative and the Unique Contract** are positive steps and deserve to be expanded.
- More broadly, competitiveness is not determined by the regulatory framework alone: it also depends on **operational conditions** – code of conduct, interoperability, the development of the European Health Data Space (EHDS) – and on simple and favourable access to fundings, **particularly for start-ups**, in order to support the development of our industry and patients' access to innovative therapies. In this regard, AFCROs, through its European representative EUCROF, plays a leading role in discussions with the EMA and European authorities.

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