

# State of the Nation: opportunities and challenges facing industry in considering the UK as a destination for research and clinical trials

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8 October 2026



# Who we are

- ◆ The Association of the British Pharmaceutical Industry (ABPI) exists to make the UK the best place in the world to research, develop and access medicines and vaccines to improve patient care.
- ◆ We represent companies of all sizes that invest in making and discovering medicines and vaccines to enhance and save the lives of millions of people around the world.
- ◆ In England, Scotland, Wales and Northern Ireland, we work in partnership with governments and the NHS so that patients can get new treatments faster and the NHS can plan how much it spends on medicines. Every day, our members partner with healthcare professionals, academics and patient organisations to find new solutions to unmet health needs.

[abpi.org.uk](https://abpi.org.uk)



# UK Pharmaceutical Investment Competitiveness Report 2026

benchmarks the UK's attractiveness as a destination for investment



**£9.3bn**

invested in UK R&D  
each year by  
pharmaceutical  
industry



**£2bn**

of new investment  
committed in the  
past year by  
pharmaceutical  
industry



**125,000**

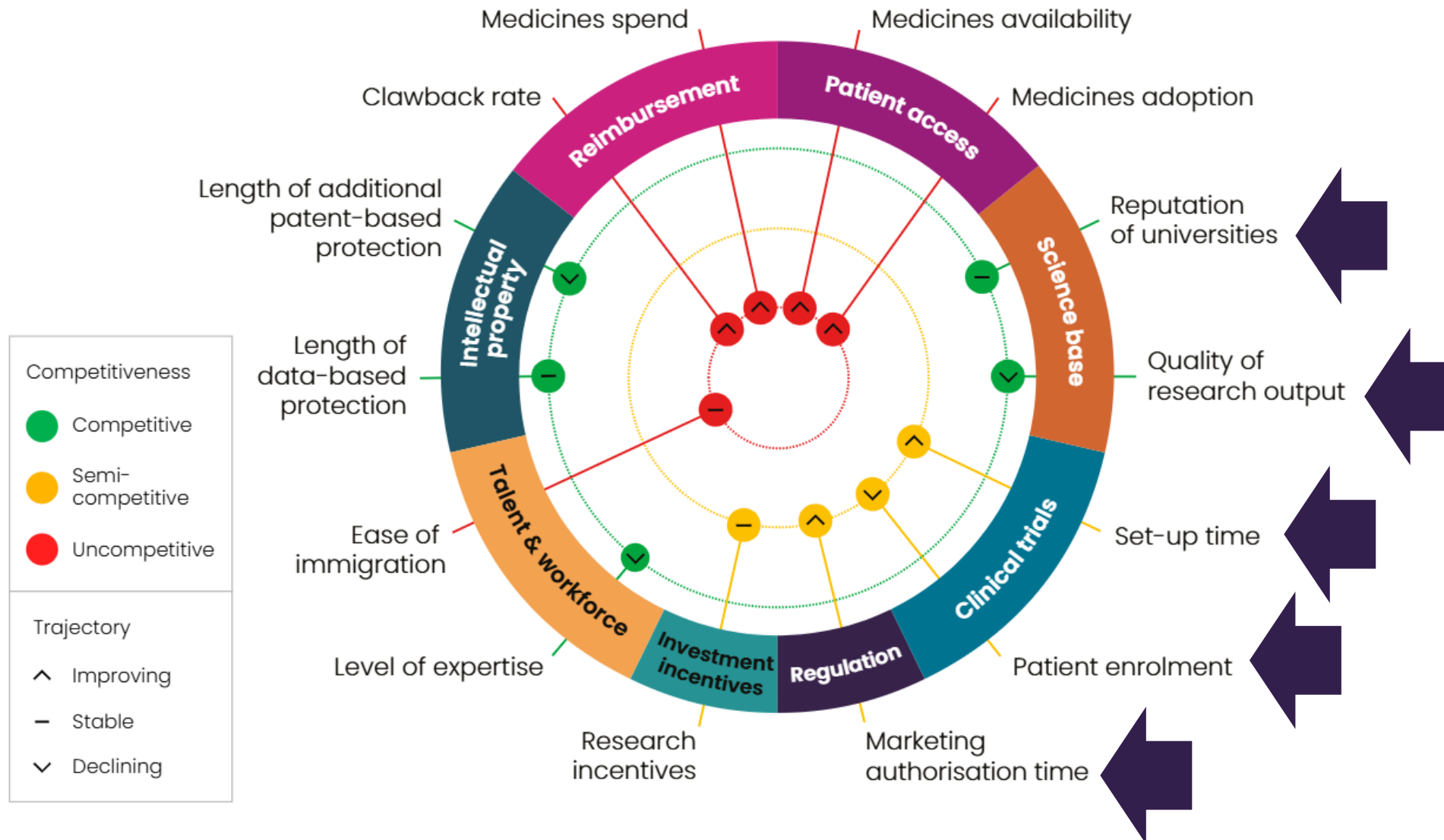
jobs supported  
across the UK today



**£20.4bn**

direct gross value  
added to the  
economy

# UK competitiveness in key investment drivers



# Science base

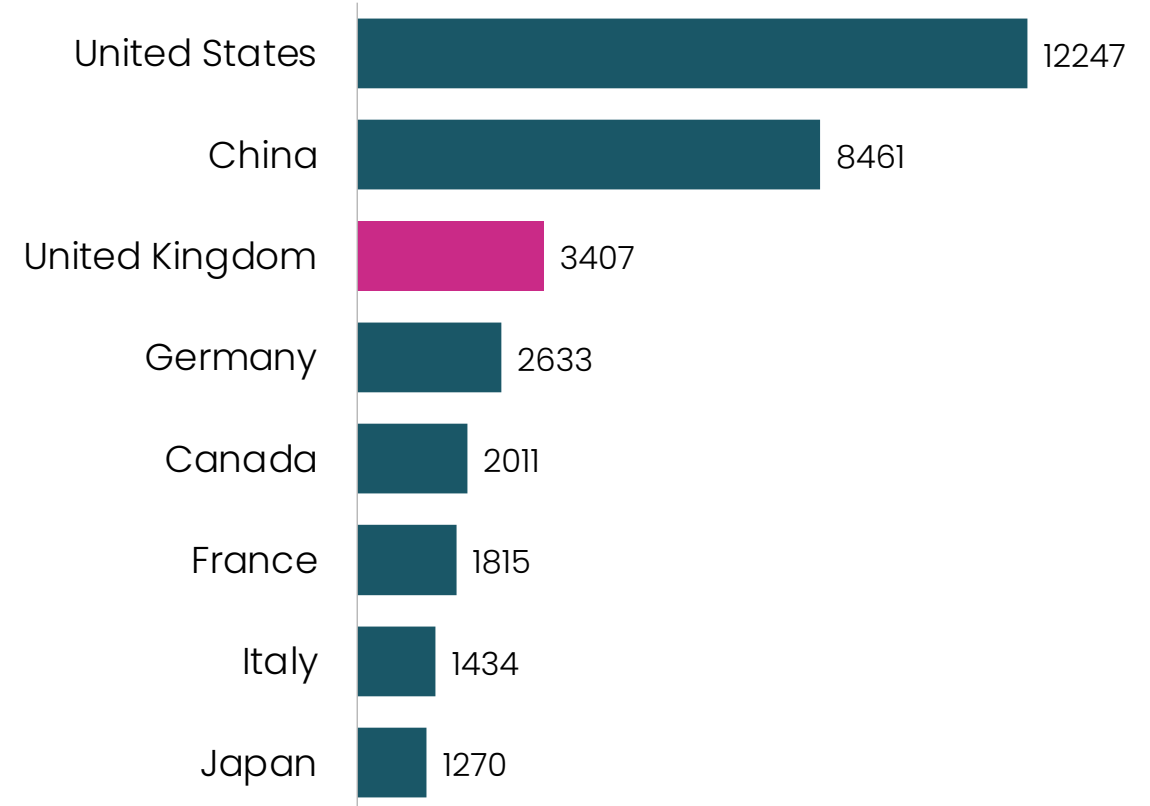
The UK ranks in the top three for 7 of 9 pre-clinical research metrics, more than any other area:

- 16 of the world's top 100 universities for life sciences
- Largest government budget for health R&D in Europe, and an exceptionally strong research charity ecosystem
- First in Europe for the number of biotechs and for venture capital raised

## £50m

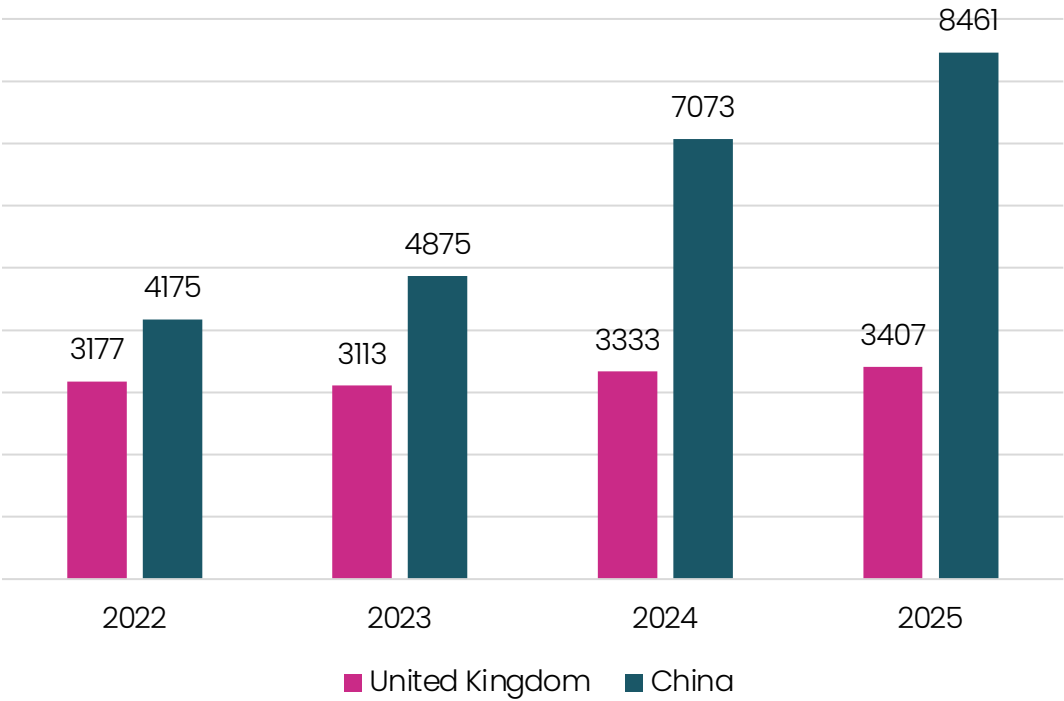
Government investment in a Pre-clinical Translational Models Hub and a UK Centre for the Validation of Alternative Methods. This is a positive example of the UK investing in novel capabilities that will differentiate science base and investor offer

### Nature Index (health sciences)

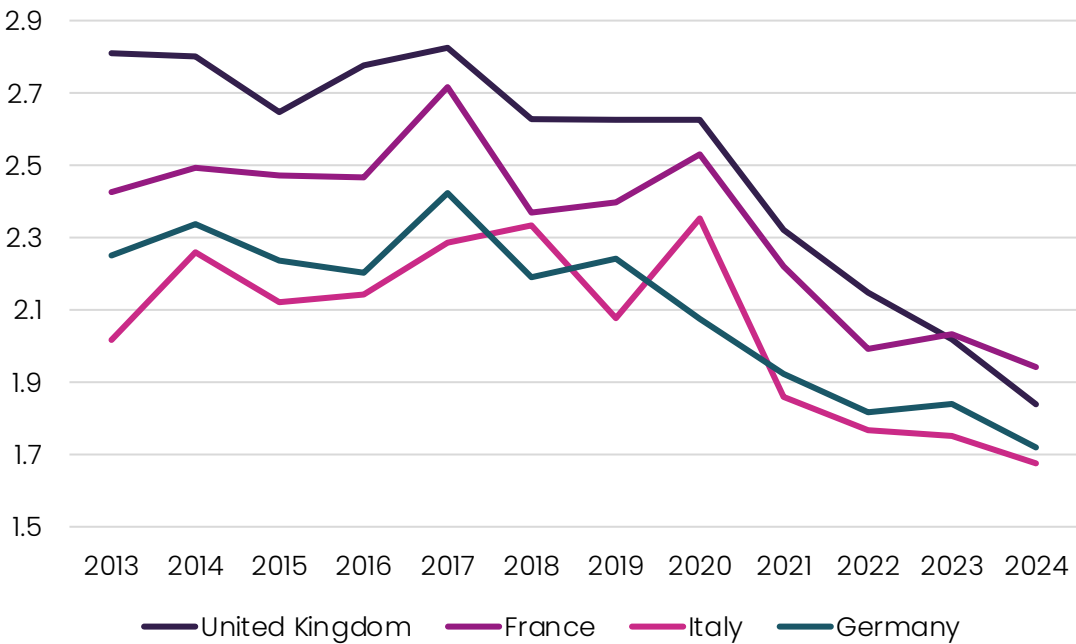


But the UK’s competitors are closing the gap. The competitiveness of a science base reflects investment decisions made years earlier. Early signs of falling performance should therefore be acted on sooner rather than later.

Nature Index (health sciences)



Global share of most highly cited (top 1%) medical publications (%)

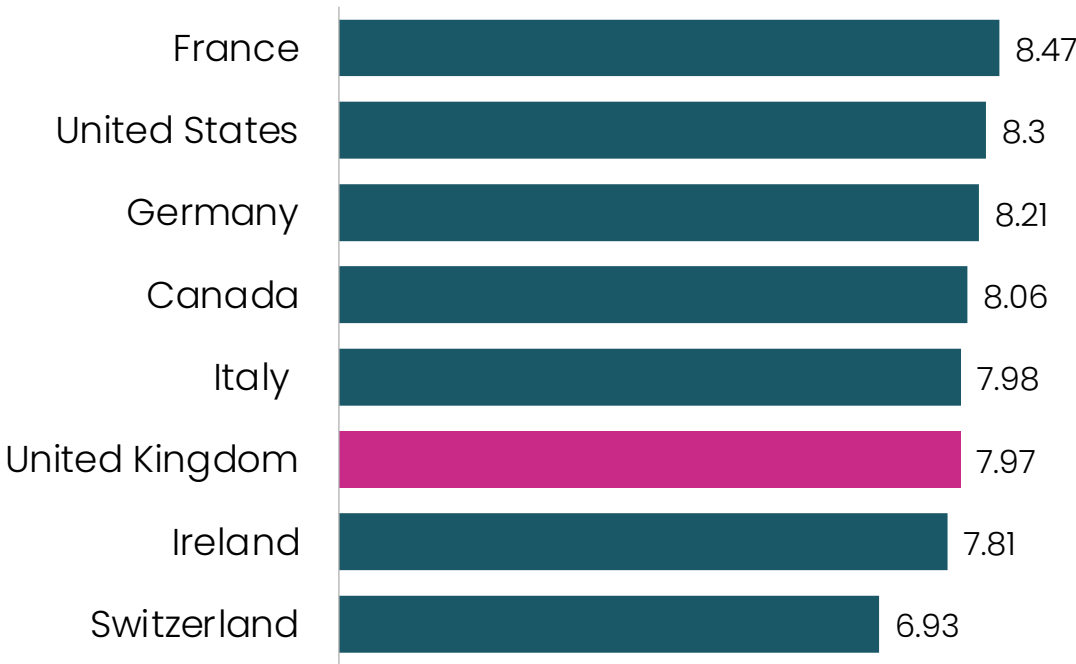


Source: Nature; OLS (SciVal)

# Domestic talent

The share of UK students graduating in natural sciences, mathematics or statistics fell between 2020 and 2023, pushing the UK's rank from 1st to 6th. In contrast, US graduate output grew steadily between 2015 (7 per cent) and 2023 (8.3 per cent), pushing its rank up to 2nd, due to growing demand from STEM sectors like the pharmaceutical industry.

**Graduates with degrees in natural sciences, mathematics or statistics (%)**



**Graduates with degrees in natural sciences, mathematics or statistics (%)**



Source: UNESCO, latest available year (2023).

# UK clinical trials environment

# Number of pharmaceutical industry interventional clinical trials initiated in 2024, by country, by phase, compared with global rankings in 2023

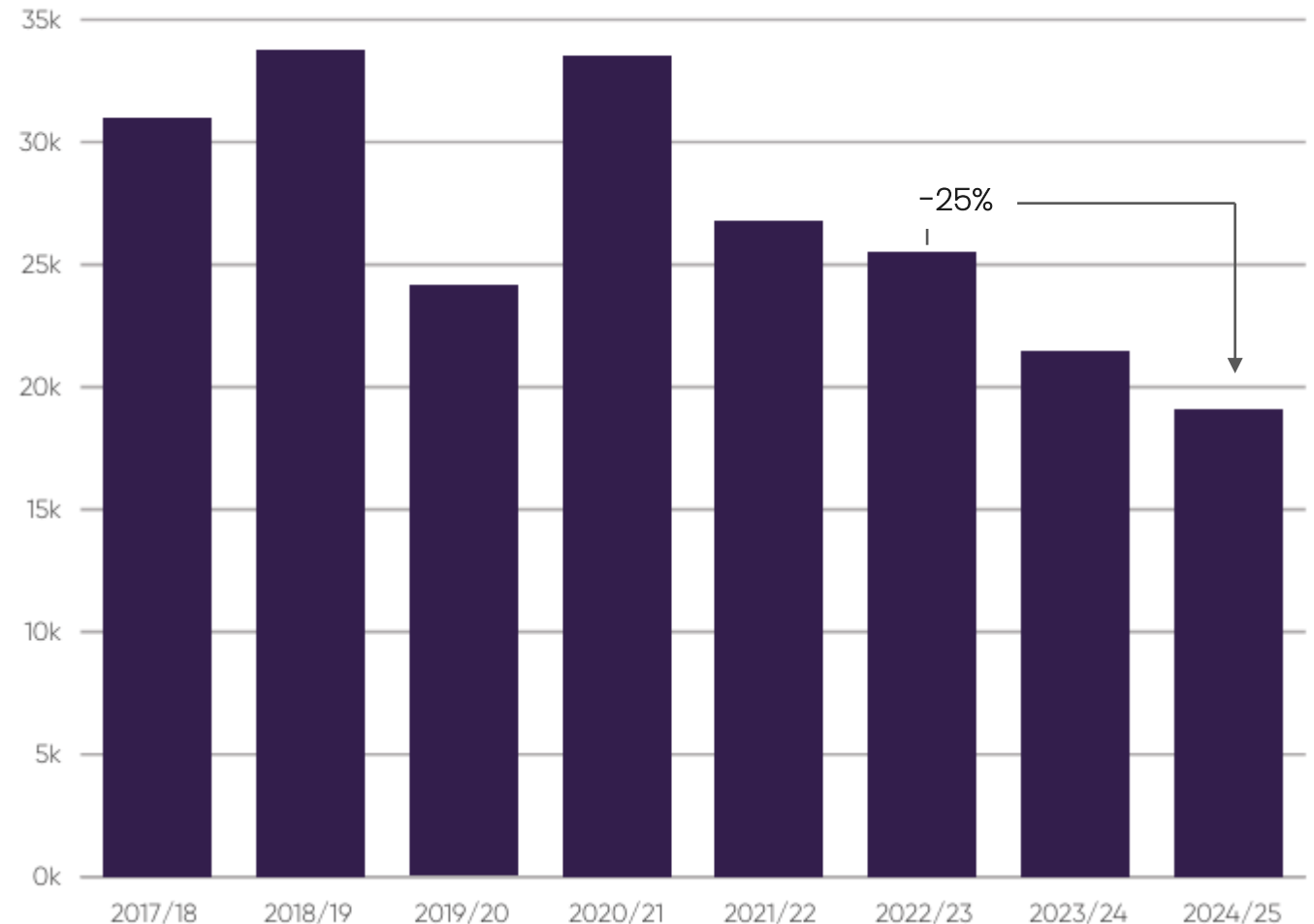
| Rank | Country        | Phase I   | Country        | Phase II   | Country        | Phase III  |
|------|----------------|-----------|----------------|------------|----------------|------------|
| 1    | China (↑1)     | 868       | USA            | 867        | China (↑1)     | 494        |
| 2    | USA (↓1)       | 596       | China          | 751        | USA (↓1)       | 489        |
| 3    | Australia      | 228       | Spain          | 261        | Spain          | 312        |
| 4    | Spain (↑3)     | 100       | <b>UK</b>      | <b>222</b> | Germany (↑2)   | 272        |
| 5    | Japan (↓1)     | 97        | Germany        | 209        | Italy (↑2)     | 268        |
| 6    | <b>UK (↓1)</b> | <b>94</b> | France         | 204        | <b>UK (↑2)</b> | <b>262</b> |
| 7    | Germany (↑1)   | 87        | Italy          | 191        | France (↑2)    | 261        |
| 8    | Canada (↓2)    | 72        | Australia (↑1) | 184        | Canada (↓3)    | 254        |
| 9    | France         | 69        | Canada (↓1)    | 172        | Poland (↑1)    | 248        |
| 10   | Italy (↑2)     | 47        | Japan (↓3)     | 171        | Japan (↓6)     | 247        |

# UK commercial trial recruitment declined for the last four years

- ◆ Patient recruitment into commercial trials fell for a fourth year running, to 19,092 in 2024/25.
- ◆ Just 3.4% of NHS interventional trial participants in 2024/25 were in industry interventional trials, down from 10.3% in 2017/18.
- ◆ Slow set-up, workforce challenges and low site recruitment targets still mean too few UK patients take part.

Figure 2: Number of participants recruited to interventional industry studies in the UK per year from 2017/18 to 2024/25.

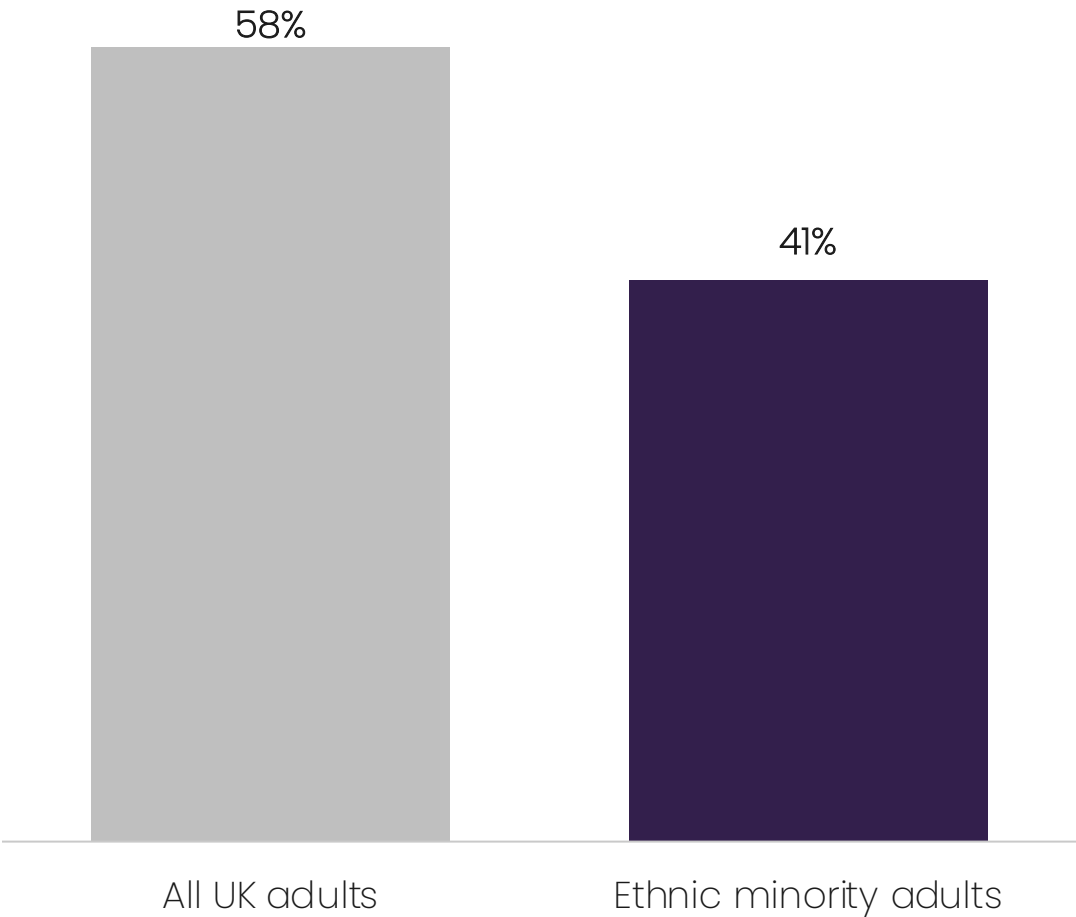
Data source: NIHR RDN, NRS, HCRW, NICRN and NICTN.



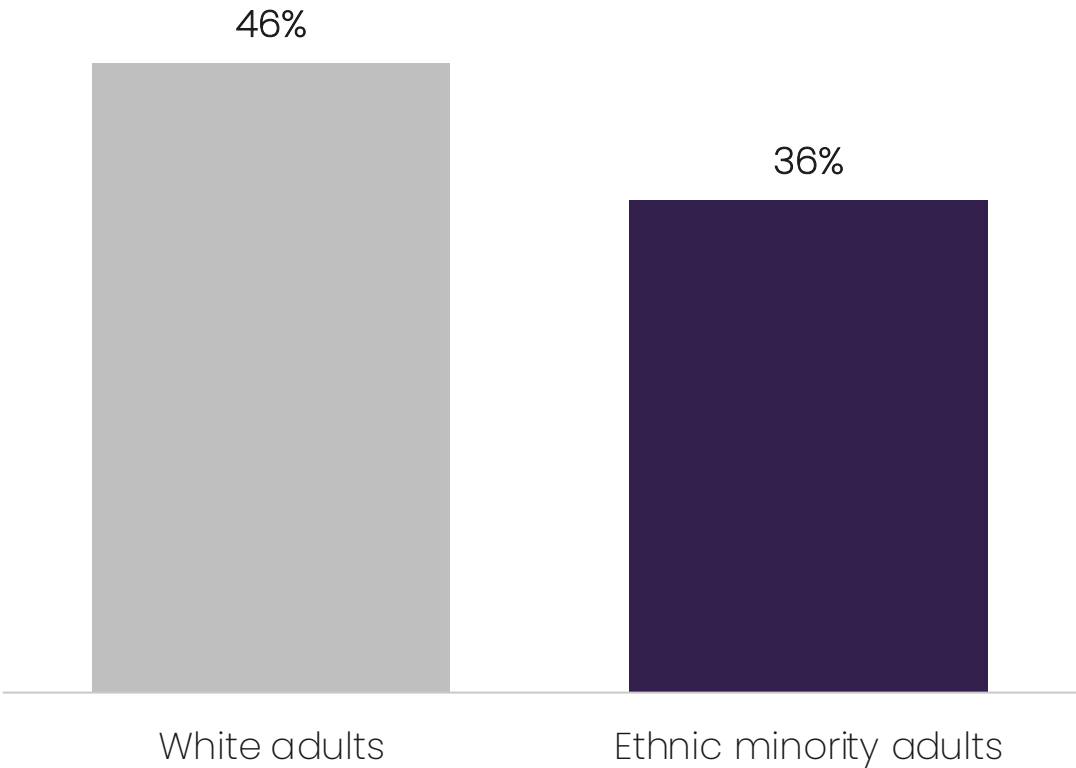
# Ethnic minority adults are far less likely to take part, even once invited



Willingness to join a clinical trial



Participation once invited to a trial



Source: Ipsos, Diversity and Clinical Trials in the UK, Feb 2024 (cited in ABPI/AMRC, Jun 2025)

# Clinical trials

Clinical research is the most time-intensive and costly part of R&D, and one of the most globally mobile forms of investment. The ability to set up and deliver trials to time and target has a large bearing on sentiment.

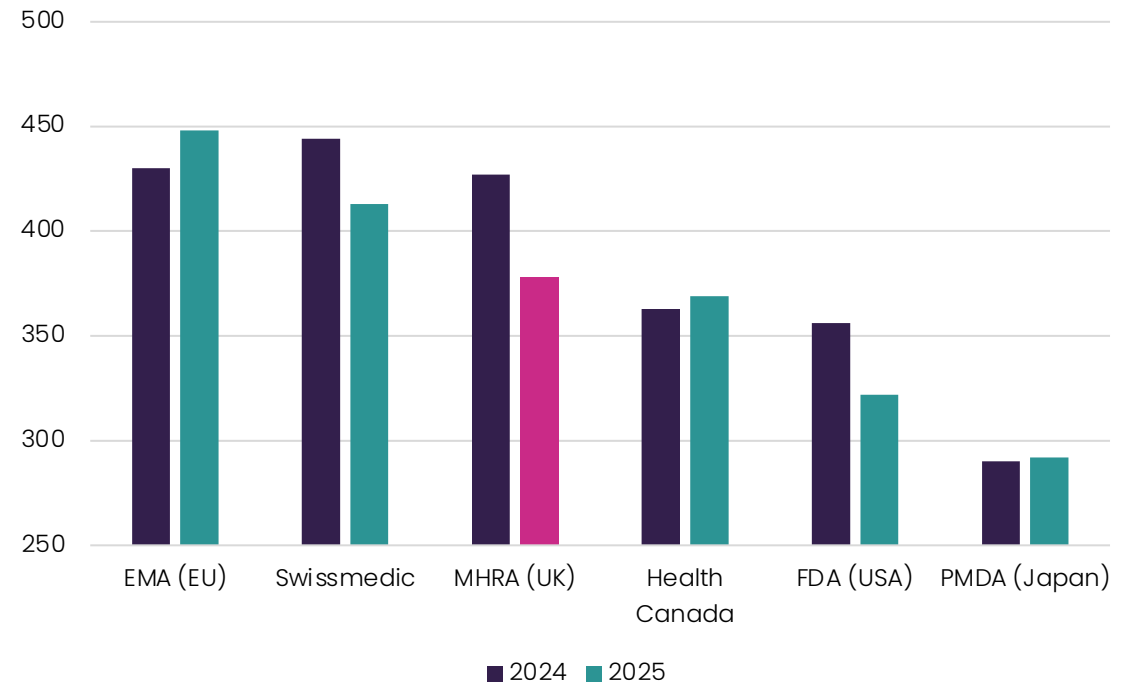
## Significant commitments

- Target for study set-up (150 days) set
- UK-wide improvements to how industry trials are costed and contracted

## Performance against target

**98%** of applications approved within 60 days  
**58%** of first sites opened to recruitment within 60 days  
**44%** first participant of first site within 30 days  
**25%** fall in patient recruitment, 2022/23 and 2024/25

Median marketing authorisation approval timeline (days)



# Health data: the unrealised advantage

If industry could readily access the high-quality longitudinal health data recorded by the NHS through safe and secure mechanisms, the UK would hold a unique advantage:

## **Pre-clinical research**

Clinical samples such as blood and tissue are critical enablers of discovery science. The UK has world-renowned collections including UK Biobank, but is held back by poor discoverability, inconsistent collection, storage and access practices, and limited standardisation of data governance.

## **Clinical research**

Good health data enables efficient set-up and delivery: population data supports feasibility assessment, and patient records support representative recruitment. The UK's offer falls short on unreliable site feasibility, inaccurate screening and fragmented approaches to NHS data.

## **Headquarters and affiliates**

Real-world evidence increasingly supports regulatory submissions, health technology assessment and managed access. The UK's RWE offer is held back by fragmented access routes across the four nations, protracted approvals, unresolved commercial terms and an immature Secure Data Environment network.

£600m of government and Wellcome investment is creating the Health Data Research Service. Leadership and strategy are now in place. Follow-through will decide whether it overcomes the barriers that defeated past efforts.

# Industry investment in UK clinical trials infrastructure and workforce

# Voluntary Pricing Access and Growth Investment Programme

- World-first Life Sciences Investment Programme funded by industry as part of the VPAG deal
- Up to £400m to strengthen UK competitiveness in health and life sciences and drive innovation-led growth through investments in all 4 UK nations over 5 years
  - ~75% to expedite delivery of **commercial pharmaceutical clinical trials** in the UK
  - ~20% to support UK **manufacturing** innovation ecosystem
  - ~5% for innovative **health technology assessment** approaches

## Commercial Research Delivery Centres (CRDCs)

### 21 CRDCs

- NHS Lothian CRDC
- NHS Greater Glasgow and Clyde CRDC
- NHS Tayside CRDC
- NHS Grampian CRDC
- NHS Wales CRDC
- NHS Northern Ireland CRDC
- NIHR Cheshire and Merseyside CRDC
- NIHR Blackpool CRDC
- NIHR Bradford and West Yorkshire CRDC
- NIHR Central and North West Midlands CRDC
- NIHR Cornwall and Isles of Scilly CRDC
- NIHR Greater Manchester CRDC
- NIHR Leicestershire and Northamptonshire CRDC
- NIHR London North West CRDC
- NIHR Newcastle CRDC
- NIHR North East London CRDC
- NIHR North Midlands CRDC
- NIHR Sheffield Children's CRDC
- NIHR South London CRDC
- NIHR Sussex CRDC
- NIHR Wessex CRDC

CRDC UK  
NETWORK



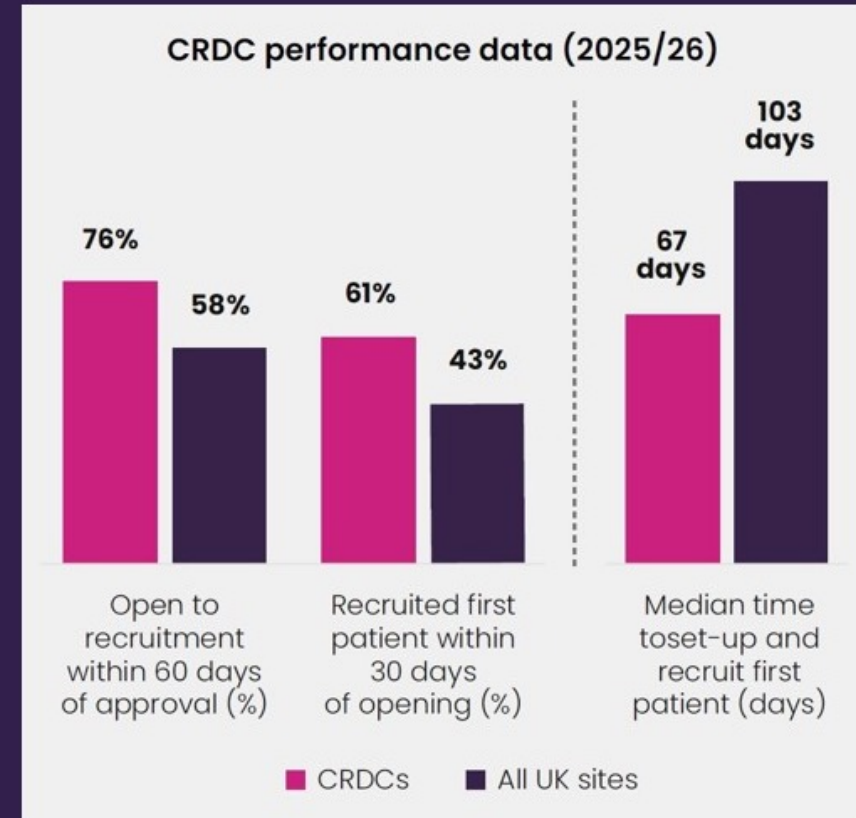
### 14 CRDCs (Primary Care)

- NIHR Greater Cambridge and Suffolk PC-CRDC
- NIHR North London PC-CRDC
- NIHR South Gloucestershire PC-CRDC
- NIHR Dorset PC-CRDC
- NIHR Breckland and Norfolk Region PC-CRDC
- NIHR Cambridgeshire and Hertfordshire PC-CRDC
- NIHR Lancashire PC-CRDC
- NIHR Cornwall and Devon PC-CRDC
- NIHR North Somerset PC-CRDC
- NIHR Greater Manchester PC-CRDC
- NIHR Cheshire and Merseyside PC-CRDC
- NIHR Thames Valley and Hampshire PC-CRDC
- NIHR Nottinghamshire PC-CRDC
- NIHR Tees Valley PC-CRDC

# Commercial Research Delivery Centres outperformed their host Trusts and the wider UK on every measure for 2025/26

76% of Commercial Research Delivery Centres' (CRDCs) studies opened within 60 days of approval against 58% across all UK sites, and their median time to first patient is 67 days against 103.

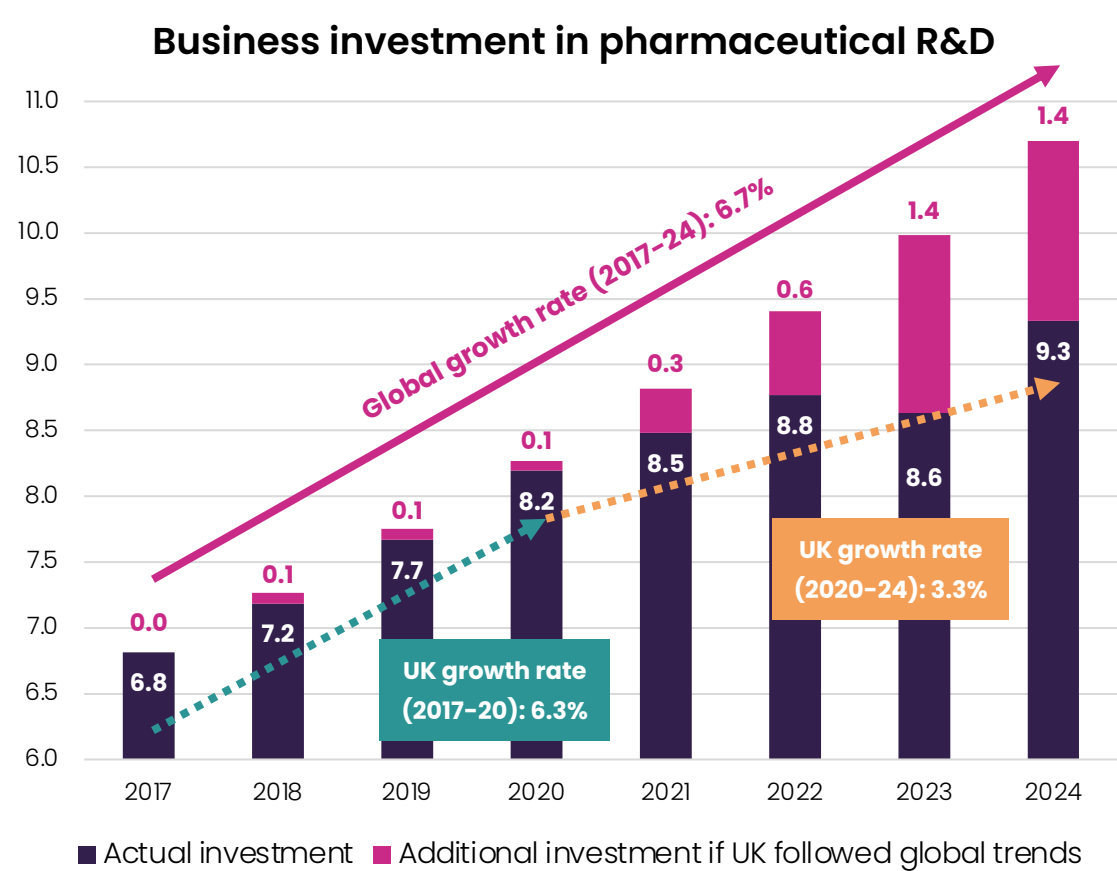
## How do the new Commercial Research Delivery Centres perform?



While there is variability between sites, the UK network of CRDCs is outperforming the wider health system in study set-up.

# Conclusion

# Green shoots are emerging for industry investment



## £2 billion

Inward investment committed into the UK by the global industry since September 2025

## £167.2 million

Pharmaceutical foreign direct investment in the first half of 2026, double the £88.8m recorded across all of 2025

## £3.8 billion

Estimated opportunity cost of pharmaceutical R&D investment the UK has forgone by lagging global trends

# Now is not the time for complacency

A thriving pharmaceutical industry could add tens of thousands of high-value jobs and billions of pounds of economic activity across every part of the UK by 2035. Capturing that prize is far from guaranteed.

## 81,300

**new jobs by 2035**

If the pharmaceutical industry's investment and growth accelerate

## 200,000

**total workforce by 2035**

Up from more than 125,000 jobs today, a 64 per cent increase in headcount

## £33 billion

**direct GVA per year by 2035**

Up from £20 billion today, spread across all UK nations and regions

## Conclusion – The UK is starting to rebuild investor confidence

### **The UK has retained its competitive strengths**

The science base, domestic talent, and intellectual property (IP) policy framework remain globally competitive.

But competitor countries are closing the gap. The UK must enhance these advantages.

### **The UK is making progress to address competitive weaknesses**

Policy commitments are starting to tackle narrow access, slow adoption, and underinvestment in innovative medicines.

Restoring UK competitiveness requires reliable, long-term delivery from government.

### **The UK can boost inward investment by developing new strengths**

The UK's health data, clinical trial, & regulatory offers could become globally leading.

But this opportunity will not last forever, as competitors are rapidly improving their offers.



## Thank you

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