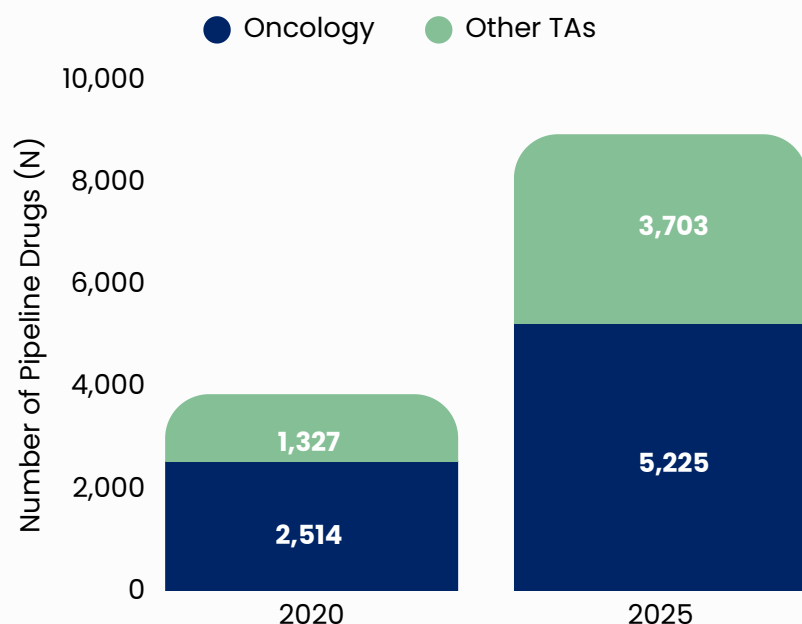


China's Rapid Pipeline Expansion Is Driving Diversification Beyond Oncology

Active pipeline innovator drugs · China-HQ companies · All development stages · 2020–2025

ACTIVE PIPELINE DRUGS BY THERAPY AREA

The number of drugs in the pipeline are increasing – oncology drugs are still dominating

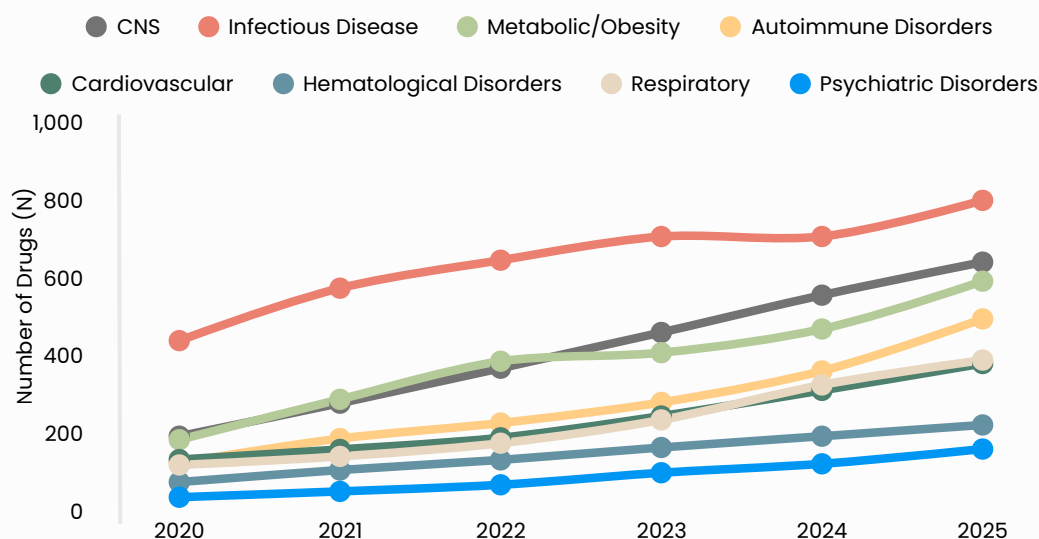


132% growth in total China-origin drug pipeline from 2020–2025, reaching 8,928 active drugs in 2025

2X growth in oncology drugs in the pipeline (which are dominating 58% of the pipeline in 2025)

3X Almost triple the growth in non-oncology pipeline drugs from 2020–2025

The number of Non-oncology drugs are also increasing in the pipeline



Infectious disease leads non-oncology pipeline growth, nearly doubling from 442 to 803 drugs between 2020–2025.

Psychiatric disorders and autoimmune conditions recorded the fastest growth, with pipeline drugs increasing **4.2x and 3.9x**, respectively, from 2020–2025.

All other TAs include: psychiatric, autoimmune, central nervous system (CNS), respiratory, metabolic/obesity, hematological, cardiovascular, and infectious disease